

**Central America and the Caribbean Region**

**Data Collection Survey on  
Development Cooperation With/Post  
COVID-19 Society in Central  
America and the Caribbean Region**

**Country Report**

**February 2022**

**Japan International Cooperation Agency  
(JICA)**

**Nippon Koei Co., Ltd.  
Koei Research & Consulting Inc.  
Nippon Koei LAC Co., Ltd.**

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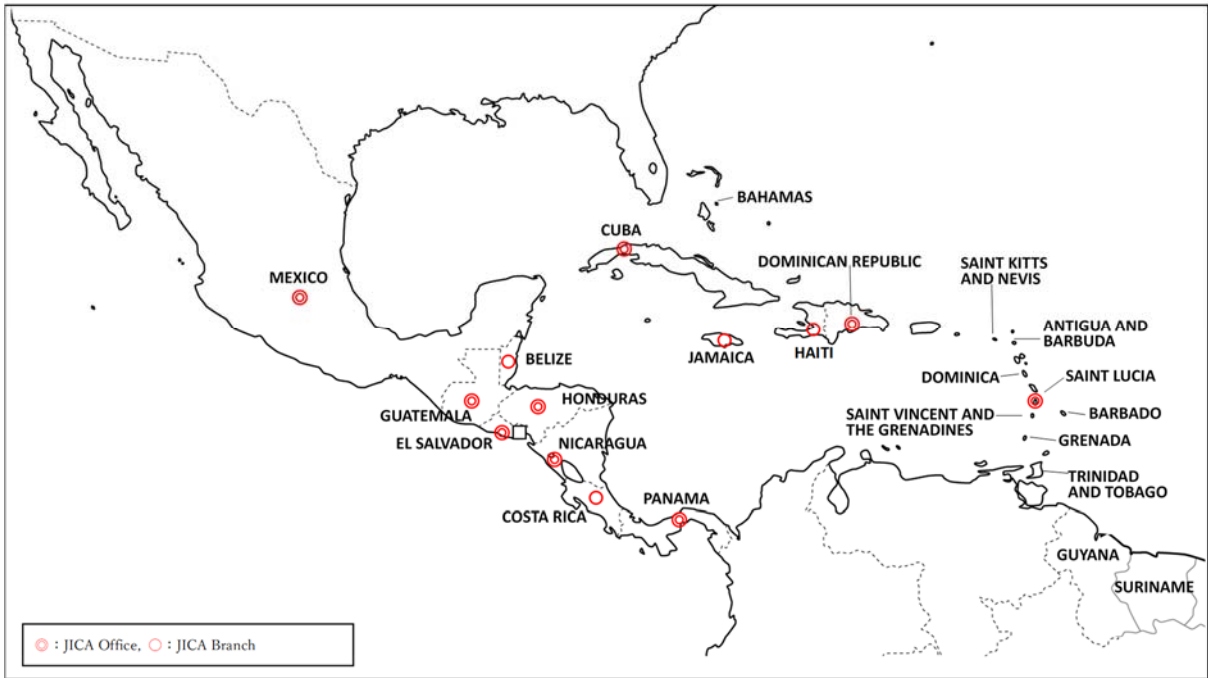
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**Location map**

# 1. Antigua and Barbuda

## 1.1 Country overview

### 1.1.1 Basic information

Antigua and Barbuda (English: Antigua and Barbuda) is a nation consisting of Antigua, Barbuda, and Redonda, located in the Lesser Antilles in the eastern Caribbean Sea. French Guadeloupe to the south, British Montserrat to the southwest, Saint Kitts and Nevis to the west, and French Saint Barthelmy to the northwest across the sea. Dangerous reefs are scattered around Antigua and Barbuda, and it has long been a difficult place in the sea, and it is said that nearly 150 ships have been wrecked since 1695. The capital is St. John's. It is a member of the Commonwealth of Nations and a member of the Commonwealth of Nations. The United States builds a military base in 1941. It joined the West Indies Federation in 1958. After the dismantling of the Commonwealth in 1962, it reached 1967 and gained autonomy. In 1972, the sugar industry was stopped because it could not compete with neighboring countries. The separatists on Barbuda, who wanted to retain British territory, were opposed to independence, but in 1981 they became independent as a member of the Commonwealth Kingdom. The main industry is tourism. In recent years, the online casino business has become one of the main sources of income, but in 2003, when the United States became illegal, it filed a complaint with the WTO for violating the agreement. In the agriculture, forestry and fisheries industry, in addition to sugarcane cultivation, livestock farming centered on sheep and goats is popular. Only the food processing industry and various assembly processing industries can be seen in the industry. There are no mineral resources. There is the head office of Slysoft, a well-known IT company.

### 1.1.2 General circumstances

|             |  |                 |  |
|-------------|--|-----------------|--|
| 1 area      | 440 square kilometers (almost the same as Tanegashima) | 2 Population    | 96,000 (2018 World Bank)   |
| 3 Capital   | St. John's   | 4 ethnic groups | African (87.3%), mixed race (4.7%), Hispanic (2.7%), Caucasian (1.6%), others (3.6%) |
| 5 languages | English (official language), Antigua Creole            | 6 religion      | Christianity (Church of England, Protestantism, Catholicism, etc.), etc.             |

Source: Ministry of Foreign Affairs HP Antigua and Barbuda Country Basic Data

### 1.1.3 Economic overview

|                          |   |                              |  |
|--------------------------|---|------------------------------|--|
| 1 Major industry         | Tourism, construction, light industry (clothing, alcohol, home appliances, etc.)  | 2 GNI<br>3 GNI / person      | US \$ 1.53 billion (World Bank 2018)<br>US \$ 21,380 (2019, WDI) |
| 4 Economic growth rate   | 7.38% (2018, World Bank)  | 5 Unemployment rate          | 8.7%   |
| 6 Price increase rate    | 1.2% (2018), 1.58% (2019 estimate) (IMF)  |                              |  |
| 7 Total trade amount     | Export: US \$ 87 million (2018 WTO)<br>Import: US \$ 501 million (2018 WTO)   |                              |  |
| 8 Major trade items      | Exports: scrap iron, alcoholic beverages (distilled liquor), transportation equipment, groceries<br>Imports: Transport machinery, sweetened beverages, groceries  |                              |  |
| 9 Major trading partners | Exports: USA, UAE, EU, Dominica, St. Martin (2018, WTO)<br>Imports: USA, Japan, EU, Trinidad and Tobago, China  |                              |  |
| 10 currencies            | Eastern Caribbean Dollar (EC \$)  | 11 Foreign currency reserves | na   |
| 12 National budget       | USD384,127,880 (2019)   | 13 External debt balance     | na   |
| 14 Economic overview     | With the tourism and service industries, which account for less than 50% of GDP, as the backbone of the economy, the promotion of offshore business and the introduction of an economic citizenship program in which foreign investors obtain citizenship through financial contributions, etc. We are trying to diversify industrial and government revenues. Although it is classified as a high-income country with a per capita income of about \$ 16,000, it is vulnerable to natural disasters such as hurricanes, and the tourism industry, which is a major industry, is easily affected by trends in the world economy. It has an economic structure that is easily affected.<br>The economic situation deteriorated due to the terrorist attacks on the United States in 2001, the security |                              |  |



|  |   |
|--|---|
|  | <p>incident in the country in 2008, and the decline in the tourism industry caused by the global financial crisis. In 2010, it received financial reconstruction support from the IMF. Since 2014, it has achieved economic growth of about 4% to 7.3% (2018), except in 2017, which was driven by the strong tourism industry and was damaged by Hurricane Irma.</p> <p>The financial situation remains severe, and the ratio of public debt has remained below 80% of GDP since 2009, which has become a serious issue.</p> |
|--|---|

Source: Ministry of Foreign Affairs HP Antigua and Barbuda Country Basic Data

## 1.1.4 Country-specific development cooperation policy

### (1) Government of Japan Development Cooperation Policy by Country

**Table 1-1 Overview of Japan's ODA to Antigua and Barbuda**

|   |  |
|---|--|
| 1. 1. Overview  |  |
| Japan's economic cooperation with Antigua and Barbuda began with the acceptance of trainees in 1987, and in 2006 a technical cooperation agreement was signed. Japan is currently implementing technical cooperation and grant-in-aid for aid in the fields of disaster prevention / environment and fisheries as one of the major donor countries.   |  |
| 2. 2. Aim of development cooperation  |  |
| There are many island nations in the Caribbean region where the Caribbean Community (Calicom) member countries including Antigua and Barbuda are located, and natural disasters such as hurricanes, earthquakes, and tsunamis occur frequently, and marine biological resources are sustainable. It has something in common with Japan in that it promotes its use. In addition to being vulnerable to climate change and natural disasters, Calicom member countries are based on industries that have a small population and economy and are susceptible to external factors such as agriculture, fisheries, and tourism. All 14 countries are included in the list of small island developing states published by the United Nations Secretariat. In order to overcome the vulnerabilities peculiar to small island developing states in the Calicom countries, it is necessary to cooperate by utilizing Japan's technology and knowledge in addition to deepening bilateral relations and socio-economics of each country. It is important from the viewpoint of financial stability and sustainable growth of the entire region.                    |  |
| 3. 3. Basic policy  |  |
| In the Development Cooperation Charter, even if the per capita income is at a certain level, for countries with special vulnerabilities such as small island developing states, necessary cooperation will be provided according to the actual development needs and burden capacity of each country. For the Caribbean Community (Calicom) member countries, the first is based on the Japan-Calicom Joint Ministerial Statement adopted at the 4th Japan-Calicom Foreign Ministers' Meeting held in November 2014. In order to "cooperate for sustainable development including overcoming vulnerabilities peculiar to small island developing states", we will develop cooperation that makes use of Japan's technology and knowledge. In accordance with these policies, Antigua and Barbuda will be supported to overcome the vulnerabilities peculiar to small island developing states by supporting environmentally friendly sustainable social development and disaster prevention efforts. We also reaffirmed that we will cooperate in accordance with this policy at the 5th Japan-Calicom Foreign Ministers' Meeting held in September 2016. |  |
| 4. Priority areas   |  |
| (1) Disaster prevention / environment: While strengthening the ability to respond to frequent hurricanes and natural disasters such as floods, small island developing states in the fields of conversion to renewable energy, promotion of energy conservation, waste management, water resource management, etc. Provide the support necessary to overcome the vulnerabilities peculiar to developing countries. Also pay attention to sharing knowledge with other Calicom member countries.   |  |
| (2) Fisheries: In line with Japan's shared goal of sustainable use of marine biological resources, we will continue to cooperate for the sustainable development and management of the fishery industry for industrial diversification.   |  |

Source: Ministry of Foreign Affairs HP Antigua and Barbuda Country Data Collection 2017

**Table 1-2 National Development Cooperation Policy for Antigua and Barbuda (September 2016)**

|                                       |  |
|---------------------------------------|--|
| 3. 3. Priority field (medium goal)    |  |
| (1) Disaster prevention / environment | We are frequently hit by natural disasters such as hurricanes and floods, and we will provide support in the fields of disaster prevention and climate change countermeasures, which are urgent issues. Cooperate to promote the introduction of renewable energy and energy conservation. In addition, we will provide support that contributes to solving chronic water shortages that affect the tourism industry, which is a major industry. |
| (2) Fisheries                         | For industrial diversification, we will cooperate for the sustainable development and management of the fishery with the aim of increasing employment, increasing income, food security and strengthening access to overseas markets by the fishery.   |
| (3) Others                            | Waste management is particularly important for small island nations whose main industry is the tourism industry, and promotes the 3Rs (reduction of waste generation, reuse of resources and products, and recycling). And the issue is how to properly manage the disposal site.  |

Source: Survey Team

## (2) Survey on COVID-19 by development partners

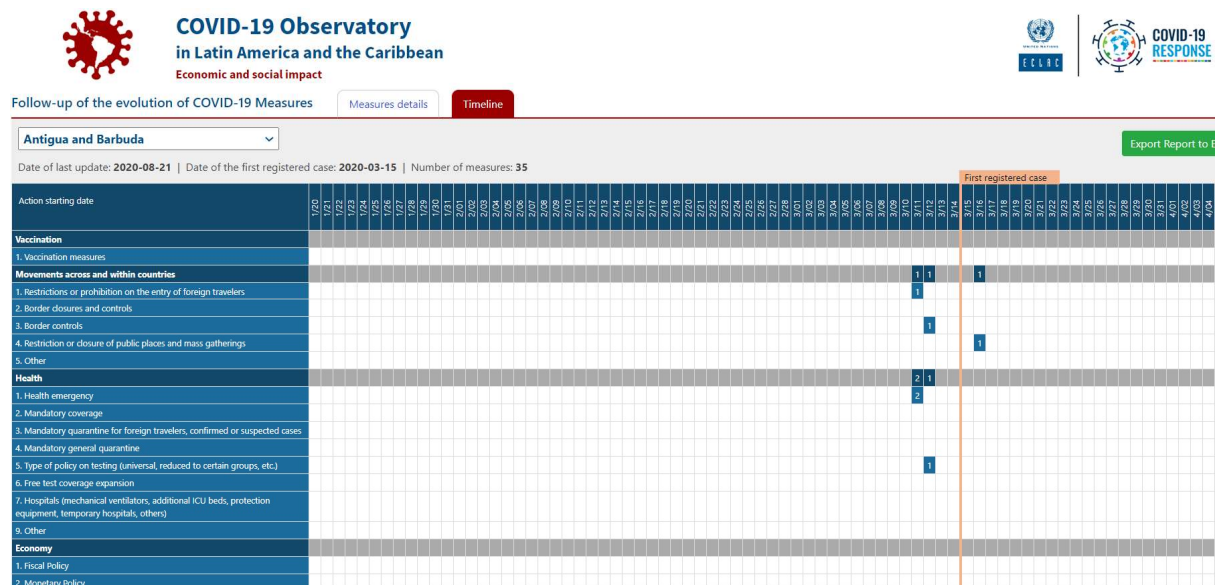
We extracted sector names and specific quantitative figures that have a large impact on the country-specific analysis described in various reports of development partners. Reports from the World Bank, OECD, BCIE, SICA, and the Ministry of Economy, Trade and Industry of Japan suggest the importance of introducing digitalization and innovation (Fintech, Aggrotech, Autotech, etc.), and incorporate the survey results of these development partners. I arranged it accordingly.

World Bank: "Growth and Revitalization" 2021 Semi-Annual Economic Report (March 2021)

- ✓ OECD: COVID-19 in LAC, Regional socio-economic implications and policy priorities (December 2020)
- ✓ BCIE: Impacto Económico del COVID-19 (April 2020)
- ✓ SICA: Estimación del Impacto Económico del COVID-19 en Centroamérica y República Dominicana (April 2020)
- ✓ Ministry of Economy, Trade and Industry of Japan: "The ideal way of economic and industrial policy based on the influence of the new corona virus" (June 2020), Accelerating digitalization and onlineization, gig economy, innovation in the transition period to a new daily life 1) Medical care / health, 2) Digital: Infrastructure development premised on the arrival of a digital society, 3) Green: Response to climate change problems, Energy security, 4) Emphasizes resilience.

### 1.1.5 Policies for COVID-19 measures taken by governments of each country

Various policies for COVID-19 taken by the government are described on the ECLAC homepage "COVID-19 Observatory" by country, time series, and field, and can be analyzed.



Source: <https://cepalstat-prod.cepal.org/forms/covid-countrysheet/index.html?country=ATG>

In this survey, the 10 policies implemented in Antigua and Barbuda posted on this website were classified by sector as much as possible.

#### 1) Infection spread and alleviation of aggravation and death

No material was available.

## 2) Support for affected industries and people

**Table 1-3 Support for Affected Industries and People (Antigua and Barbuda)**

| Various policies taken by the government (COVID-19 Observatory for LAC) |  |    |  |
|---|--|----|--|
| Socioeconomic policy  |  | 2  |  |
| Health care & nutrition   |  | 1  |  |
| Education   |  | 0  |  |
| Agriculture & rural development   |  | 0  |  |
| Private sector  |  | 2  |  |
| Environment & disaster prevention                                       |  | 0  |  |
| Governance and social security  |  | 3  |  |
| DX and innovation   |  | 0  |  |
| Infrastructure & energy   |  | 0  |  |
| Tourism Tourism   |  | 0  |  |
| PPP   |  | 0  |  |
| Others (b)  |  | 2  |  |
| total   |  | 10 |  |

Source: Survey Team

## 3) Arrangement of various policies for COVID-19 taken by the government

COVID-19 Observatory for Latin America and Caribbean (ECLAC) organized by governments

**Table 1-4 Government-directed COVID-19 Policy Categories (Antigua and Barbuda)**

### Follow-up of the evolution of COVID-19 Measures

| Vaccination   | Economy  | Social protection   |
|---|--|---|
| 1. Vaccination measures   | 1. Fiscal Policy   | 1. Cash transfers (new transfers, increase in existing transfers, expansion of cash transfers to new recipients, early disbursement of transfers) |
| <b>Movements across and within countries</b>  | 2. Monetary Policy   | 2. Food transfers / In-kind transfers   |
| 1. Restrictions or prohibition on the entry of foreign travelers  | 3. Business policy   | 3. Guarantee of basic services  |
| 2. Border closures and controls   | 4. Restriction of economic activity (including shops and shopping centers)                             | <b>Education / schools</b>  |
| 3. Border controls  | 5. Price and quantity controls   | 1. Suspension of classes  |
| 4. Restriction or closure of public places and mass gatherings  | 6. Economic Stimulus (includes aggregate value of fiscal measures and separately of credit guarantees) | 2. Provision of tools for distance learning (online platforms, TV, radio, distance-learning materials)  |
| 5. Other  | 7. Regulation of the personal hygiene and cleaning products market                                     | 3. Maintenance of school feeding programme (indicating under which modalities)  |
| <b>Health</b>   | 8. Debt relief and suspension of credit payments (individuals, microentrepreneurs)                     | <b>Gender</b>   |
| 1. Health emergency   | 9. Other   | 1. Gender-based violence against women  |
| 2. Mandatory coverage   | <b>Labor</b>   | 2. Care economy   |
| 3. Mandatory quarantine for foreign travelers, confirmed or suspected cases                                   | 1. Labor Protection  | 3. Employment and income generation   |
| 4. Mandatory general quarantine   | 2. Elective work leave   | 4. Benefits, transfers and other social protection measures   |
| 5. Type of policy on testing (universal, reduced to certain groups, etc.)                                     | 3. Reduction of working hours  | 5. Women's participation in the digital era   |
| 6. Free test coverage expansion   | 4. Prohibition of dismissal from work  | 6. Other  |
| 7. Hospitals (mechanical ventilators, additional ICU beds, protection equipment, temporary hospitals, others) | 5. Other   |   |

Source: Survey Team

## 1.2 Macroeconomic analysis and selection of priority countries

### 1.2.1 Macroeconomic analysis

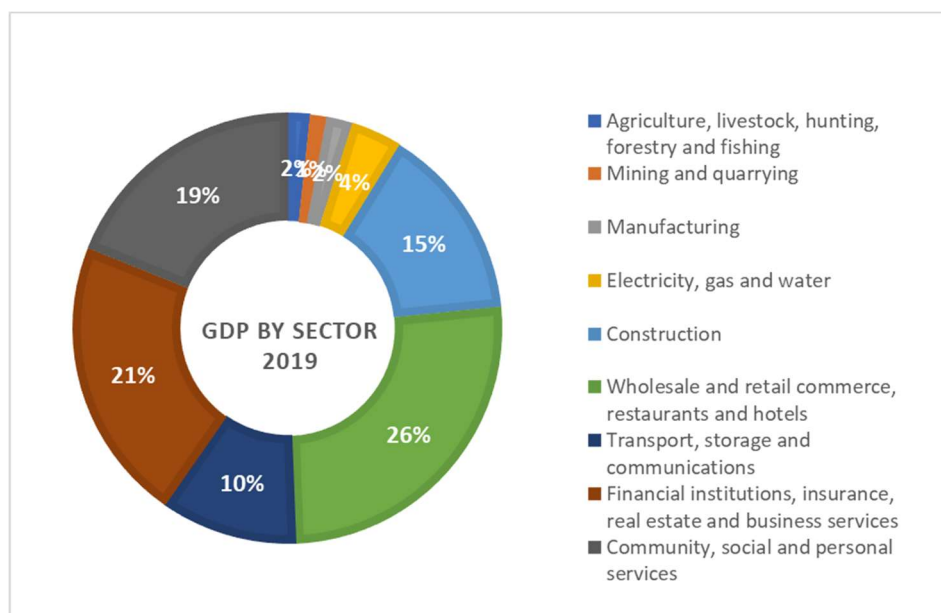
#### (1) Industrial composition

**Table 1-5 Industrial Composition (Antigua and Barbuda)**

Table: GDP by sector (En millones de dólares del Caribe Oriental a precios constantes de 2006)

|  | 2011    | 2012    | 2013    | 2014    | 2015    | 2016    | 2017    | 2018    | 2019a/  | 2020 b/ |
|--|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Agriculture, livestock, hunting, forestry and fishing                | 47.3    | 48.0    | 51.7    | 43.0    | 44.1    | 45.7    | 52.6    | 53.1    | 53.7    | 53.9    |
| Mining and quarrying   | 19.3    | 20.5    | 28.8    | 30.1    | 26.8    | 29.8    | 34.1    | 39.5    | 41.2    | 38.1    |
| Manufacturing  | 58.4    | 50.3    | 58.2    | 60.5    | 61.4    | 65.3    | 63.7    | 67.8    | 63.8    | 58.7    |
| Electricity, gas and water   | 106.3   | 104.8   | 102.7   | 100.8   | 105.9   | 106.6   | 107.6   | 108.1   | 125.5   | 112.4   |
| Construction   | 194.0   | 213.5   | 219.5   | 235.1   | 244.3   | 291.3   | 349.9   | 447.9   | 474.4   | 374.9   |
| Wholesale and retail commerce, restaurants and hotels                | 683.4   | 712.3   | 704.2   | 738.1   | 754.1   | 784.6   | 776.8   | 814.0   | 841.6   | 535.0   |
| Transport, storage and communications                                | 274.8   | 272.1   | 267.1   | 265.9   | 288.1   | 296.2   | 299.4   | 324.3   | 332.8   | 251.1   |
| Financial institutions, insurance, real estate and business services | 556.1   | 554.9   | 554.4   | 571.3   | 616.0   | 623.6   | 649.9   | 676.8   | 693.3   | 697.2   |
| Community, social and personal services                              | 453.1   | 477.8   | 491.1   | 521.2   | 516.8   | 553.6   | 560.6   | 591.1   | 613.3   | 583.1   |
| Total  | 2,392.6 | 2,454.2 | 2,477.7 | 2,565.9 | 2,657.4 | 2,796.6 | 2,894.7 | 3,122.7 | 3,239.4 | 2,704.3 |

Source: ECLAC



Source: Survey Team

## (2) Trends in major economic indicators

**Table 1-6 Trends in Major Economic Indicator (Antigua and Barbuda)**

Table 1 ANTIGUA AND BARBUDA: MAIN ECONOMIC INDICATORS (Annual growth rates)

|  | 2011   | 2012   | 2013   | 2014   | 2015   | 2016   | 2017   | 2018   | 2019a/ | 2020 b/ |
|--|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------|
| Gross domestic product (Annual growth rates c/)                                      | -2.0   | 3.4    | -0.6   | 3.8    | 3.8    | 5.5    | 3.1    | 7.4    | 3.4    | -18.3   |
| Per capita gross domestic product (Annual growth rates c/)                           | -3.3   | 2.1    | -1.8   | 2.6    | 2.7    | 4.4    | 2.2    | 6.4    | 2.5    | -19.1   |
| Gross domestic product, by sector (Annual growth rates c/)                           |        |        |        |        |        |        |        |        |        |         |
| Agriculture, livestock, hunting, forestry and fishing                                | 13.6   | 1.5    | 7.7    | -17.0  | 2.6    | 3.7    | 15.0   | 1.1    | 2.7    | 0.4%    |
| Mining and quarrying   | -19.3  | 6.3    | 40.4   | 4.7    | -11.1  | 11.4   | 14.3   | 16.0   | 3.0    | -7.5%   |
| Manufacturing  | 2.8    | -13.9  | 15.7   | 3.9    | 1.5    | 6.4    | -2.4   | 6.4    | -10.0  | -8.0%   |
| Electricity, gas and water   | 8.0    | -1.4   | -2.0   | -1.8   | 5.0    | 0.7    | 1.0    | 0.5    | 10.6   | -10.4%  |
| Construction   | -24.4  | 10.1   | 2.8    | 7.1    | 3.9    | 19.2   | 20.1   | 28.0   | 17.0   | -21.0%  |
| Wholesale and retail commerce, restaurants and hotels                                | -1.9   | 4.2    | -1.1   | 4.8    | 2.2    | 4.0    | -1.0   | 4.8    | 7.3    | -36.4%  |
| Transport, storage and communications  | 0.2    | -1.0   | -1.9   | -0.4   | 8.4    | 2.8    | 1.1    | 8.3    | 5.4    | -24.6%  |
| Financial institutions, insurance, real estate and business services                 | 2.1    | -0.2   | -0.1   | 3.1    | 7.8    | 1.2    | 4.2    | 4.1    | 1.6    | 0.6%    |
| Community, social and personal services  | 0.7    | 5.5    | 2.8    | 6.1    | -0.9   | 7.1    | 1.3    | 5.4    | 3.3    | -4.9%   |
| Balance of Payments (Millions of dollars)  |        |        |        |        |        |        |        |        |        |         |
| Current account balance  | -117.4 | -179.4 | -180.0 | 3.3    | 29.3   | -34.9  | -115.0 | -219.6 | -105.9 | -176.0  |
| Goods balance  | -374.3 | -433.3 | -439.6 | -433.6 | -358.5 | -393.1 | -456.7 | -568.2 | -575.5 | -406.2  |
| Exports, f.o.b.  | 56.2   | 59.0   | 63.5   | 98.7   | 67.6   | 50.1   | 37.2   | 37.8   | 40.3   | 17.5    |
| Imports, f.o.b.  | 430.4  | 492.3  | 503.1  | 532.4  | 426.1  | 443.2  | 493.9  | 606.0  | 615.8  | 423.7   |
| Services trade balance   | 270.7  | 274.6  | 264.4  | 536.7  | 522.7  | 513.0  | 480.4  | 485.4  | 627.7  |         |
| Income balance   | -39.5  | -51.1  | -30.9  | -60.8  | -84.2  | -97.1  | -78.7  | -78.0  | -101.5 |         |
| Net current transfers  | 25.7   | 30.3   | 26.2   | -39.0  | -50.7  | -57.7  | -59.9  | -58.9  | -56.5  |         |
| Capital and financial balance (Millions of dollars)                                  |        |        |        |        |        |        |        |        |        |         |
| Net foreign direct investment d/   | 65.2   | 133.1  | 94.7   | 39.9   | 99.9   | 59.4   | 143.9  | 193.3  | 153.8  |         |
| Other capital movements d/   | 62.8   | 57.6   | 127.7  | 51.2   | -70.6  | -50.2  | -45.4  | 41.5   | -17.9  |         |
| Foreign remittance from abroad for 2019 and 2020                                     | 88.4   | 139.5  | 191.5  | 30.4   | -54.9  | -87.9  | 19.8   | 156.8  | 34.4   |         |
| Microfinance dispatched and the sectors that received microfinance for 2019 and 2020 |        |        |        |        |        |        |        |        |        |         |

Source: Economic Survey of Latin America and the Caribbean 2020: Main conditioning factors of fiscal and monetary policies in the post-COVID-19 era

### 1.2.2 Impact analysis and identification of key sectors

#### (1) Impact assessment results for each sector by AHP analytic hierarchy process based on economic indicators

**Table 1-7 Results of Sector Impact Analysis by COVID-19 (Antigua and Barbuda)**

| ECLAC category   | Changes around COVID-19 | Trends before COVID-19 | Total GDP ratio of the sector | comprehensive evaluation |   |
|--|-------------------------|------------------------|-------------------------------|--------------------------|---|
| Importance (weight)  | 0.4590                  | 0.0660                 | 0.0750                        |                          |   |
| Agriculture, livestock, hunting, forestry and fishing                | 2                       | 6                      | 2                             | 0.033                    | 8 |
| Mining and quarrying   | 4                       | 8                      | 1                             | 0.054                    | 6 |
| Manufacturing  | 5                       | 1                      | 3                             | 0.057                    | 5 |
| Electricity, gas and water   | 6                       | 2                      | 4                             | 0.071                    | 4 |
| Construction   | 7                       | 9                      | 6                             | 0.095                    | 2 |
| Wholesale and retail commerce, restaurants and hotels                | 9                       | 4                      | 9                             | 0.113                    | 1 |
| Transport, storage and communications                                | 8                       | 3                      | 5                             | 0.094                    | 3 |
| Financial institutions, insurance, real estate and business services | 1                       | 5                      | 8                             | 0.031                    | 9 |
| Community, social and personal services                              | 3                       | 7                      | 7                             | 0.053                    | 7 |

Source: Survey Team

#### 1) ECLAC Sector Classification Amendments to the Sector Classification

In line with the method described in the main volume, the Sector Classification is divided into the Vertical Sector and the Cross-Cutting Sector, the ECLAC classification sector is allocated to the Vertical Sector Classification, and the evaluation of various policies related to COVID-19 taken by the government along with the results of the partner survey and the indicators of the national development

cooperation policy, the ranking of priority sectors are calculated using the four indicators, which are described in the table below.

**Table 1-8 Ranking of Priority Sectors (Antigua and Barbuda)**

|                                   | Economic Indicator Analysis | Government Policy on COVID-19 | Survey on COVID-19 by Development Partners | Country Development Cooperation Policy | Base Case |   | Priority |
|-----------------------------------|-----------------------------|-------------------------------|--|--|-----------|---|----------|
| Importance (weight)               | 0.6000                      | 0.2000                        | 0.1000                                     | 0.1000                                 |           |   |          |
| Social and Economic Policy        | 0.0000                      | 0.0400                        | 0.0000                                     | 0.0000                                 | 0.0400    |   | ○        |
| Health and Nutrition              | 0.0298                      | 0.0200                        | 0.0000                                     | 0.0000                                 | 0.0498    | 5 |          |
| Education                         | 0.0204                      | 0.0000                        | 0.0000                                     | 0.0000                                 | 0.0204    | 6 |          |
| Agriculture and Rural Development | 0.0582                      | 0.0000                        | 0.0125                                     | 0.0167                                 | 0.0873    | 4 |          |
| Manufacturing                     | 0.1578                      | 0.0400                        | 0.0125                                     | 0.0167                                 | 0.2269    | 2 | ○        |
| Environment/ Disaster Management  | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0333                                 | 0.0333    |   | ○        |
| Governance and Security           | 0.0000                      | 0.0600                        | 0.0000                                     | 0.0000                                 | 0.0600    |   | ○        |
| DX Innovation                     | 0.0000                      | 0.0000                        | 0.0375                                     | 0.0000                                 | 0.0375    |   | ○        |
| Infrastructure and Every          | 0.2619                      | 0.0000                        | 0.0125                                     | 0.0167                                 | 0.2911    | 1 | ○        |
| Tourism                           | 0.0719                      | 0.0000                        | 0.0250                                     | 0.0167                                 | 0.1136    | 3 | ○        |
| Public-Private Partnership        | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0000                                 | 0.0000    |   | ○        |

Source: Survey Team

## (2) Sensitivity analysis

### 1) Analysis case settings

Based on the above methodology, the following case settings were made.

**Table 1-9 Sensitivity Analysis Case-based Weighting Settings (Antigua and Barbuda)**

|  | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|--|-----------|------------------------|------------------------|------------------------|
| Economic indicator analysis  | 0.6       | 0.6                    | 0.5                    | 0.5                    |
| Investigation and arrangement of various policies for COVID-19 taken by the government | 0.2       | 0.1                    | 0.1                    | 0.1                    |
| Development partner survey results   | 0.1       | 0.2                    | 0.2                    | 0.3                    |
| Country-specific development cooperation policy  | 0.1       | 0.1                    | 0.2                    | 0.1                    |

Source: Survey Team

## 2) Summary of sensitivity analysis

Sensitivity analysis did not show much change, which was close to the result of the base case.

**Table 1-10 Summary of Sensitivity Analysis Results (Antigua and Barbuda)**

|                                   | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|-----------------------------------|-----------|------------------------|------------------------|------------------------|
| Social and economic policy        |           |                        |                        |                        |
| Health care / nutrition           | 5         | 5                      | 5                      | 5                      |
| education                         | 6         | 6                      | 6                      | 6                      |
| Agriculture / rural development   | 4         | 4                      | 4                      | 4                      |
| Manufacturing industry            | 2         | 2                      | 2                      | 2                      |
| Environment / disaster prevention |           |                        |                        |                        |
| Governance and citizen security   |           |                        |                        |                        |
| DX / Innovation                   |           |                        |                        |                        |
| Infrastructure and Energy         | 1         | 1                      | 1                      | 1                      |
| sightseeing                       | 3         | 3                      | 3                      | 3                      |
| Public-private partnership        |           |                        |                        |                        |

Source: Survey Team

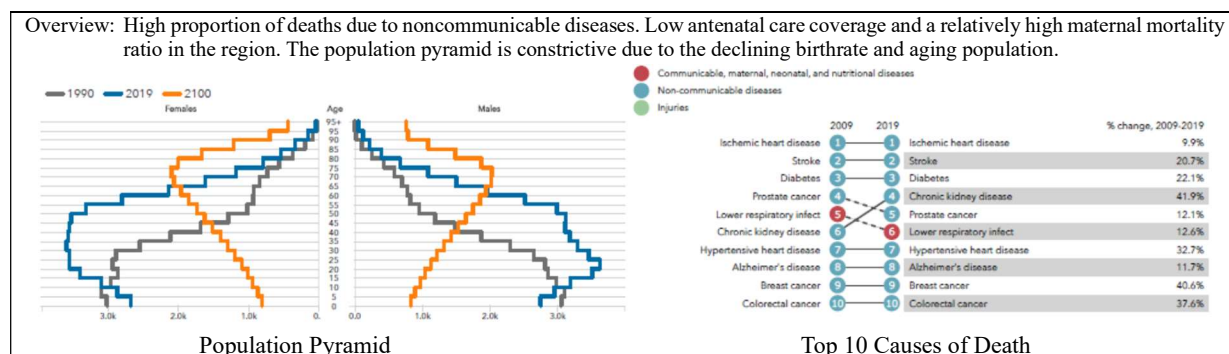
### **(3) Selection of priority sectors by country**

From the above results, 1) social / economic policy, 2) manufacturing industry, 3) environment / disaster prevention, 4) governance / citizen security, 5) DX / innovation, 6) infrastructure / energy, 7) tourism, 8) public-private partnership are selected as priority sectors.



## 1.3 Country-specific information by sector

### 1.3.1 Health care / nutrition



| Demography                                      |   |   |   |   |                                   |                                       |                               |
|---|---|---|---|---|-----------------------------------|---------------------------------------|-------------------------------|
| Population                                      | Urban population (%)                      | Urban population growth (%)             | Life Expectancy (years)                     |   |                                   | Population ≥ 65 (%)                   |                               |
| 96,286  | 24.51                                     | 0.48                                    | Male  | Female  | Both                              |                                       |                               |
|   |   |   | 77.98                                       | 75.72   | 76.89                             | 8.80                                  |                               |
| Maternal, Newborn and Child Health              |   |   |   |   |                                   |                                       |                               |
| Total fertility rate                            | Neonatal mortality (per 1,000 livebirths) | Under 5mortality (per 1,000 livebirths) | Maternal mortality (per 100,000 livebirths) | Antenatal care ≥ 4 (%)                          | Immunization (1yr)                |                                       |                               |
| 1.99  | 3.80                                      | 6.90                                    | 42  | 83  | DTP (%)                           | MCV1 (%)                              |                               |
|   |   |   |   |   | 95                                | 96                                    |                               |
| Nutrition                                       |   |   |   | Health Finance                                  |                                   |                                       |                               |
| Under 5 Children                                |   | Adult overweight (%)                    |   | Current health expenditure per capita (USD PPP) |                                   | Current health expenditure to GDP (%) | Out-of-pocket expenditure (%) |
| Stunting (%)                                    | Overweight (%)                            | Male                                    | Female                                      |   |                                   |                                       |                               |
| -   | -   | 29                                      | 30  | 1,071   |                                   | 5.23                                  | 15                            |
| Health Service Provision (per 1,000 population) |   |   |   | COVID-19 related Indicators as of January 2022  |                                   |                                       |                               |
| Hospital beds                                   | Doctors                                   | Nurses                                  | Total confirmed cases (per million)         | Total death (per million)                       | Total number of tests (per 1,000) | People completed vaccination (%)      |                               |
| 15  | 3.80                                      | 3                                       | 58,149.66                                   | 1,225.59  | -                                 | 60.24                                 |                               |

Source: Graphs=Institute for Health Metrics and Evaluation, County Profile; Demography, Total fertility rate, Neonatal mortality, under-5 mortality, Health finance= World Development Indicators, the World Bank (Accessed on Aug 2021); Maternal mortality= UNICEF (Sep 2019); Antenatal care, Immunization, Nutrition, Health service provision,= OECD/The World Bank (2020), Health at a Glance: Latin America and the Caribbean 2020; COVID-19 related indicators= Our World in Data (Accessed on Jan 2022)

| Health                                  |  |
|---|--|
| Leadership/ Governance                  | Responsible Agency: Ministry of Health, Wellness and the Environment, Centralized <a href="https://health.gov.ag/">https://health.gov.ag/</a> (A top page was under construction as of 5 Nov 2021.)<br>Multisectoral approaches are implemented for HIV/AIDS, mental health, environmental health, health promotion, nutrition, and anti-violence programs, but need to enhancement for community level collaboration.<br>Major Relevant Policies: Antigua and Barbuda commitments to the Sustainable Development Goals 2030 |
| Service Providing System                | The public sector covers the primary to tertiary level. The private sector, including returnees who have gained experience abroad, is also growing. Primary facilities located on every 3.2km, 25 units in total. Private clinics and laboratories operated by experienced health personnel who returned from abroad. The Eastern Caribbean Regional Cancer Center is operated under PPP.  |
| Health Finance                          | National health insurance  |
| Human Resource for Health               | Well qualified doctors<br>Both doctors and nurses tend to work in the Unites States.   |
| IT/ Digital Health                      | National health information system for both clinical and health promotion services<br>Telemedicine is provided at the Mount St. John Medical Center (a national referral hospital, <a href="https://www.msjmc.org/services">https://www.msjmc.org/services</a> )   |
| Drugs/ Medical Equipment                | The government procures for public sector.<br>No drug price control  |
| Priority                                | Noncommunicable diseases (diabetes, cardiovascular diseases, stroke), mental health, aging   |
| Communicable Disease Emergency Response | To enhance core capacity of the International Health Regulation (IHR), the Quarantine Law was revised, and a radiation emergency medical management system has been developed.   |
| Major Development Partners              | PAHO/WHO, DIFD, UNAIDS, USAID  |
| Nutrition                               |  |
| Institutional Arrangement               | National Council on Food and Nutrition Security (Multisectoral Platform)<br>Zero Hunger 2030 multisectoral initiative has been implemented in collaboration with FAO, other government agencies, NGOs, foundations, and civil societies.   |
| Major Relevant Policies                 | Antigua and Barbuda Food and Nutrition Security Policy, 2012   |
| Human Resource                          | Nutrition related degrees: No<br>Nutrition related subjects in pre-service education: Yes<br>Number of nutrition related professionals: 7.0 per 100,000 population   |

Source: Survey Team with reference to WHO Country Cooperation Strategy for Antigua and Barbuda at a glance, May 2018, Institute for Health Metrics and Evaluation, County Profile, PAHO, Health Systems and Services Profile Antigua and Barbuda, 2010, WHO, Global atlas of medical devices, 2017, and WHO, Nutrition Landscape Information System (NLIS)



### 1.3.2 Education

| Overview  |   |  |              |                 |                 |                 |      |              |               |              |              |
|---|---|--|--------------|-----------------|-----------------|-----------------|------|--------------|---------------|--------------|--------------|
| Number of children  | <table border="1"> <thead> <tr> <th>Education level</th> <th>Preschool</th> <th>primary</th> <th>Lower secondary</th> <th>Upper secondary</th> </tr> </thead> <tbody> <tr> <td>2018</td> <td>2,050 people</td> <td>10,123 people</td> <td>4,855 people</td> <td>3,001 people</td> </tr> </tbody> </table> | Education level  | Preschool    | primary         | Lower secondary | Upper secondary | 2018 | 2,050 people | 10,123 people | 4,855 people | 3,001 people |
|   | Education level   | Preschool  | primary      | Lower secondary | Upper secondary |                 |      |              |               |              |              |
| 2018  | 2,050 people  | 10,123 people  | 4,855 people | 3,001 people    |                 |                 |      |              |               |              |              |
| Source: Institute for Statistics (UIS), UNESCO Bureau of Statistics |   |  |              |                 |                 |                 |      |              |               |              |              |
| Government organization   | Ministry of Education, Science and Technology   |  |              |                 |                 |                 |      |              |               |              |              |
| Education indicator   | Net school enrollment rate (2018): Primary education 99.3%, lower secondary 98.6%, upper secondary 87.2%<br>Primary education completion rate (2018) 96.2%, out-of-school children rate (2018) 0.7%   |  |              |                 |                 |                 |      |              |               |              |              |
| Impact of COVID-19  |   |  |              |                 |                 |                 |      |              |               |              |              |
| School closure / reopening  | From March 11, 2020 to February 2, 2021, 78 days were completely closed and 91 days were partially closed. As of October 19, 2021, remote learning is offered for preschool and primary education, and face-to-face lessons are held for secondary education.   |  |              |                 |                 |                 |      |              |               |              |              |
| COVID-19 measures   | Applying "Education Sector Measures / Strategies" formulated by the Organization of Eastern Caribbean States (OECS)<br>The Ministry of Education, Science and Technology notified all educational institutions of COVID-19 guidance and safety protocols on March 13, 2020.                               |  |              |                 |                 |                 |      |              |               |              |              |
| Distance education  | Implementation status   | Introducing a learning virtual platform of a private company, opening an internet blog that children and students can access at each school, and distributing printed teaching materials to children and students who cannot access the internet. Used Moodle for higher education and Google Classroom for secondary education. |              |                 |                 |                 |      |              |               |              |              |
|   | Access  | Internet connected school rate is about 90-100%  |              |                 |                 |                 |      |              |               |              |              |
|   | Teacher training  | N / A  |              |                 |                 |                 |      |              |               |              |              |
| School hygiene  | Infection control measures  | Applying UNICEF's "Guide to Safe School Reopening"   |              |                 |                 |                 |      |              |               |              |              |
|   | Facility maintenance  | Approximately 100% of schools have basic water, hand-washing facilities, and toilets (WHO, UNICEF)   |              |                 |                 |                 |      |              |               |              |              |
| School lunch / nutrition  | 50% reduction during school closure   |  |              |                 |                 |                 |      |              |               |              |              |
| Countermeasures for vulnerable people                               | N / A   |  |              |                 |                 |                 |      |              |               |              |              |
| Support for donors, etc.  | N/A   |  |              |                 |                 |                 |      |              |               |              |              |

Source: Survey Team

### 1.3.3 Agriculture / rural development

|   |   |          |          |          |          |         |
|---|---|----------|----------|----------|----------|---------|
| Urban / rural population ratio                | 24.6% / 75.4% (FAOSTAT 2018)  |          |          |          |          |         |
| Agricultural land area                        | 9,000 ha (FAOSTAT 2019) 1)  |          |          |          |          |         |
| Agricultural sector employment                | 3.9% of total employment (CARICOM 1991) 2)  |          |          |          |          |         |
| Agricultural GDP                              | 2.1% of total GDP (World Bank 2020)   |          |          |          |          |         |
| Of the agricultural sector Value added amount | 26,368.86 \$ 1,000 (including forestry) (World Bank 2020) 3) * Statistical figures include forestry   |          |          |          |          |         |
| Agricultural sector expenditure ratio         | Ratio of agricultural fiscal expenditure to national budget (%) 4)  |          |          |          |          |         |
|   | 2018  | 2019     | 2020     |          |          |         |
|   | 0.79  | 0.62     | 2.00     |          |          |         |
| Agricultural sector import / export balance   | Trade Balance (USD1,000 FAOSTAT) 5)   |          |          |          |          |         |
|   |   | 2015     | 2016     | 2017     | 2018     | 2019    |
|   | export  | 1,476    | 1,158    | 4,015    | 5,041    | 3,531   |
|   | Import  | 120,318  | 107,820  | 138,192  | 148,955  | 143,850 |
| Balance of payments                           | -118,842  | -106,662 | -134,177 | -143,914 | -140,319 |         |
| Agricultural development Policy / plan /      | Until the 1960s, Antigua and Barbuda's agriculture was a large-scale sugarcane production, and along with molasses and rum obtained from it, it was an important sector of the country, accounting for 40% of GDP 6). Since then, the GDP contribution has been 1.5-2% since the 1980s due to the |          |          |          |          |         |

|                    |  |
|--------------------|--|
| strategy           | <p>shrinking international market, the severe drought and lack of irrigation facilities to counter it, the impact of catastrophic hurricanes, and the shift of the labor market to the tourism sector. It has declined to 7). In recent years, food import dependence has reached 79%, and the importance of the agricultural sector is recognized from the perspective of food security 8). The government has formulated the "National Food Security Policy (2012)" 9) as a measure, which is the "Agricultural Action Plan (2012-2022)" 10) of the Organization of Eastern Caribbean States (OECS), the Caribbean Community (CARICOM). )S "Regional Food Security Plan 2011-2025" 11) and "CARICOM Agricultural Policy" 12).</p> <p>In addition, the national "Medium-Term Development Strategy 2016-2020" 13) aims to join the ranks of developed countries within 15-20 years, and provides strategies and action guidelines for each sector. In the agricultural sector, "improvement of irrigation water", "reduction of imports of agricultural products, strengthening of marketing and distribution for export", "introduction of the latest technology in each process of production, harvesting and storage", "solar thermal energy" "Usage", "Dissemination services and research for agricultural and livestock productivity improvement technology", "Seed production research project", "Improvement of access to funds to promote new business", "Vulnerability mitigation program against climate change and disaster risk" Five guidelines are provided, including "development" and "expansion and improvement of agricultural product processing including simple processed foods such as juice, jam and jelly".</p> <p>The Caribbean Agricultural Research and Development Institute (CARDI), of which Antigua and Barbuda is a member, is a research and development institute that aims to improve the competitiveness and sustainability of the regional agricultural sector in 1974 by the 12 member countries of CARICOM. Was established in. To transform the agricultural sector into a modernized, competitive, innovative and resilient one, CARDI has created a five-year roadmap, Strategic Plan 2018-2022 (14). CARDI divides its member countries into three groups based on the economic structure of each country, and Antigua and Barbuda is the third group. This group is an OECS country and R &amp; D is heavily dependent on CARDI. Countries with high food security risks need to increase their food production as much as possible. On the other hand, many farmers are small and have problems due to the large number of steep terrain. The biggest threat to these smallholders is weather problems such as drought and excessive rainfall, which need to be addressed.</p>  |
| Impact of COVID-19 | <p>Due to the high dependence on food imports8), COVID-19 has a negative impact on the food supply chain. According to the United Nations World Food Program, COVID-19 Food Security and Livelihood Impact Survey in the Caribbean 202115), one in four respondents said, "Mainly lack of economic (income) means. Rising food prices have made it difficult to access the market. " According to the results of "Market Fixed-Point Observation Survey February 2021, June 2020", access shortages have decreased from 30% to 24%, and the problem of food price increases has decreased from 72% to 61%, showing an improving trend. On the other hand, there is also an increase in "decrease in food intake and food stockpile" and "ratio of households engaged in kitchen gardens", indicating that the food situation is severe. For agricultural and fishermen, 37% of respondents "faced a decline in sales compared to the same period last year", 66% "have difficulty selling products" and 69% "marketing capacity and storage" Due to the lack of equipment, some of the products have to be discarded. " In addition to COVID-19, a drought has also occurred, which has been double-hit 26).</p>   |
| Source / reference | <ol style="list-style-type: none"> <li>1) FAOSTAT-Land, Input and Sustainability-Land Use-Area-Agriculture (<a href="https://www.fao.org/faostat/en/#data/RL">https://www.fao.org/faostat/en/#data/RL</a>)</li> <li>2) (<a href="http://statistics.caricom.org/Files/Publications/LABOUR%20FORCE/ANTIGUA%20AND%20BARBUDA.pdf">http://statistics.caricom.org/Files/Publications/LABOUR%20FORCE/ANTIGUA%20AND%20BARBUDA.pdf</a>)</li> <li>3) Agriculture, forestry, and fishing, value added (constant 2015 US \$) --Latin America &amp; Caribbean (<a href="https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart">https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart</a>)</li> <li>4) FAOSTAT-Government Expenditure-Share of Total Expenditure-Central Government (<a href="https://www.fao.org/faostat/en/#data/IG">https://www.fao.org/faostat/en/#data/IG</a>)</li> <li>5) FAOSTAT-Trade-Crops and livestock products-Import / Export Value-Agricultural Products (<a href="https://www.fao.org/faostat/en/#data/TCL">https://www.fao.org/faostat/en/#data/TCL</a>)</li> <li>6) COUNTRY EXPERIENCE IN LAND ISSUES ANTIGUA &amp; BARBUDA (<a href="https://pdf.usaid.gov/pdf_docs/Pnadc119.pdf">https://pdf.usaid.gov/pdf_docs/Pnadc119.pdf</a>)</li> <li>7) Agriculture, forestry, and fishing, value added (% of GDP) --Antigua and Barbuda (<a href="https://data.worldbank.org/indicator/NV.AGR.TOTL.ZS?locations=AG">https://data.worldbank.org/indicator/NV.AGR.TOTL.ZS?locations=AG</a>)</li> <li>8) Voluntary National Review (VNR) 2021 (<a href="https://sustainabledevelopment.un.org/content/documents/279502021_VNR_Report_Antigua_and_Barbuda.pdf">https://sustainabledevelopment.un.org/content/documents/279502021_VNR_Report_Antigua_and_Barbuda.pdf</a>)</li> <li>9) ANTIGUA AND BARBUDA FOOD AND NUTRITION SECURITY POLICY 2012 (<a href="http://extwprlegs1.fao.org/docs/pdf/ant158521.pdf">http://extwprlegs1.fao.org/docs/pdf/ant158521.pdf</a>)</li> <li>10) OECS Regional Plan of Action for Agriculture (<a href="https://www.oecs.org/en/our-work/knowledge/library/revised-oecs-regional-plan-of-action-for-agriculture-2012-2022/download">https://www.oecs.org/en/our-work/knowledge/library/revised-oecs-regional-plan-of-action-for-agriculture-2012-2022/download</a>)</li> <li>11) REGIONAL FOOD AND NUTRITION SECURITY ACTION PLAN (<a href="https://issuu.com/caricomorg/docs/caricomregionalfoodandnutritionsecu">https://issuu.com/caricomorg/docs/caricomregionalfoodandnutritionsecu</a>)</li> <li>12) CARICOM Agriculture Policy (<a href="https://oldsite.caricom.org/the-common-agriculture-policy#:~:text=The%20Agricultural%20sector%20in%20CARICOM,the%20Revised%20Treaty%20of%20Chagaramas.&amp;text=t%20secks%20to%20increase%20agricultural,increase%20employment%3B%20and%20reduce%20poverty.">https://oldsite.caricom.org/the-common-agriculture-policy#:~:text=The%20Agricultural%20sector%20in%20CARICOM,the%20Revised%20Treaty%20of%20Chagaramas.&amp;text=t%20secks%20to%20increase%20agricultural,increase%20employment%3B%20and%20reduce%20poverty.</a>)</li> <li>13) Medium-Term Development Strategy 2016-2020 (<a href="https://www.oneplanetnetwork.org/sites/default/files/antigua_barbuda_medium_term_development_strategy.pdf">https://www.oneplanetnetwork.org/sites/default/files/antigua_barbuda_medium_term_development_strategy.pdf</a>)</li> <li>14) CARDI Strategic Plan 2018-2022 (<a href="http://www.cardi.org/wp-content/uploads/downloads/2018/05/CARDI-Strategic-Plan-2018-to-2022-Final.pdf">http://www.cardi.org/wp-content/uploads/downloads/2018/05/CARDI-Strategic-Plan-2018-to-2022-Final.pdf</a>)</li> <li>15) Caribbean COVID-19 Food Security &amp; Livelihoods Impact Survey ANTIGUA AND BARBUDA Summary Report June 2021 (<a href="https://docs.wfp.org/api/documents/WFP-0000129479/download/">https://docs.wfp.org/api/documents/WFP-0000129479/download/</a>)</li> </ol> |

### 1.3.4 Private sector

Antigua and Barbuda is a country with a small economy (19th) but high GDP per capita (5th). The minimum wage is also high (4th), while the unemployment rate is relatively high. Since there is

little data available, it is difficult to understand trends.

|              | Index                      | Value  | Ranking                 | Year | Source  |
|--------------|----------------------------|--------|-------------------------|------|---|
| Productivity | GDP per capita (USD)       | 14,450 | 5 (Among 22 countries)  | 2020 | World Bank  |
|              | GDP per worker (USD)       | —      | — (Among 18 countries)  | —    | —   |
| Employment   | Minimum wage (USD / month) | 486    | 4 (Among 23 countries)  | 2019 | ILO   |
|              | Unemployment rate          | 8.7    | 14 (Among 22 countries) | 2018 | Ministry of Finance and Corporate Governance of Antigua and Barbuda |
|              | Female unemployment rate   | 9.9    | 12 (Among 22 countries) | 2018 | Ministry of Finance and Corporate Governance of Antigua and Barbuda |
|              | Youth unemployment rate    | 25.7   | 16 (Among 22 countries) | 2018 | Ministry of Finance and Corporate Governance of Antigua and Barbuda |
|              | Underemployment rate       | —      | — (Among 18 countries)  | —    | —   |
|              | Informal worker rate       | —      | — (Among 12 countries)  | —    | —   |

Source: Described in the table



Source: World Bank, ILO, The Global Economy, etc.

### 1.3.5 Environment / disaster prevention

|                     | item   | data  | remarks                           |
|---------------------|--|---|-----------------------------------|
| Environment         | Environmental agency                                     | Department of Environment Antigua and Barbuda, Ministry of Health, Wellness & The Environment |                                   |
|                     | Waste-related organizations                              | National Solid Waste Management Authority, Ministry of Health, Wellness & The Environment     |                                   |
|                     | Environmental Budget (USD)                               | 2019: 1,405,215<br>2020: 1,644,184<br>2021: 1,586,725<br>Three-year average: 1,545,374        | Average: 15th out of 23 countries |
|                     | Environmental budget per capita (2019-2021 average, USD) | 103.0   | 1st out of 23 countries           |
|                     | Budget ratio to national budget (2019)                   | 0.37%   | 9th out of 23 countries           |
|                     | Donor support status                                     | 1   | As of May 2021                    |
|                     | Renewable energy power generation (GWh) (2019)           | 13  | IRENA, 2021                       |
|                     | Geothermal power generation capacity (MWe)               | 2020: 0<br>2025 Forecast: 0   | WGC, 2020                         |
| Disaster prevention | Disaster prevention organization                         | The National Office of Disaster Services (NODS)   |                                   |
|                     | Donor support status                                     | 3 cases   | As of May 2021                    |
|                     | Number of natural disasters (2010-2020)                  | Major disasters: floods, storms   | (Statistical data not available)  |
|                     | Number of victims (persons) per 100,000 population       | -----   | (Statistical data not available)  |

Source: Survey Team

### 1.3.6 Governance and citizen security

| Item   | Overview  |
|--|---|
| Political system                                 | Parliamentary democracy under the constitutional monarchy belonging to the Commonwealth of Nations  |
| Election system                                  | Free and regular elections are held. The monarch is hereditary. The governor-general is appointed by the monarch based on the advice of the prime minister. After the legislative elections, the head of a majority party or coalition government is appointed by the governor as prime minister. |
| Legislative system                               | Bicameral parliament  |
| Most recent / next legislative election          | Senate: March 26, 2018<br>House of Representatives: March 21, 2018 (Next time scheduled for March 26, 2023)   |
| Judicial system<br>Appointment and term of judge | The Supreme Court Justice is appointed by the Queen of England. Other judges are appointed by the Judicial Justice Commission.  |
| Political stability                              | Stable for the past 10 years  |
| “Worldwide Governance Indicators”                | Overall, above the regional average. However, in recent years, the level of "government effectiveness" and the level of "control of corruption" have deteriorated sharply.  |

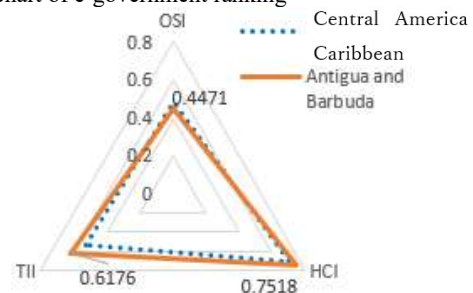
| Indicator   | Country                     | Year | Percentile Rank (0 to 100) |
|---|-----------------------------|------|----------------------------|
| Voice and Accountability                              | * Latin America & Caribbean | 2010 | ~55                        |
|   |                             | 2019 | ~55                        |
|   |                             | 2020 | ~55                        |
|   | Antigua and Barbuda         | 2010 | ~55                        |
|   |                             | 2019 | ~55                        |
|   |                             | 2020 | ~55                        |
| Political Stability and Absence of Violence/Terrorism | * Latin America & Caribbean | 2010 | ~55                        |
|   |                             | 2019 | ~55                        |
|   |                             | 2020 | ~55                        |
|   | Antigua and Barbuda         | 2010 | ~55                        |
|   |                             | 2019 | ~55                        |
|   |                             | 2020 | ~55                        |
| Government Effectiveness                              | * Latin America & Caribbean | 2010 | ~55                        |
|   |                             | 2019 | ~55                        |
|   |                             | 2020 | ~55                        |
|   | Antigua and Barbuda         | 2010 | ~55                        |
|   |                             | 2019 | ~55                        |
|   |                             | 2020 | ~55                        |
| Regulatory Quality                                    | * Latin America & Caribbean | 2010 | ~55                        |
|   |                             | 2019 | ~55                        |
|   |                             | 2020 | ~55                        |
|   | Antigua and Barbuda         | 2010 | ~55                        |
|   |                             | 2019 | ~55                        |
|   |                             | 2020 | ~55                        |
| Rule of Law   | * Latin America & Caribbean | 2010 | ~55                        |
|   |                             | 2019 | ~55                        |
|   |                             | 2020 | ~55                        |
|   | Antigua and Barbuda         | 2010 | ~55                        |
|   |                             | 2019 | ~55                        |
|   |                             | 2020 | ~55                        |
| Control of Corruption                                 | * Latin America & Caribbean | 2010 | ~55                        |
|   |                             | 2019 | ~55                        |
|   |                             | 2020 | ~55                        |
|   | Antigua and Barbuda         | 2010 | ~55                        |
|   |                             | 2019 | ~55                        |
|   |                             | 2020 | ~55                        |

|                                   |  |
|-----------------------------------|--|
| Global freedom status             | 85/100 points (citizen rights: 33/40 points, political rights: 52/60 points)<br>Classified as "free country" (Freedom House 2021)  |
| Corruption Perception Index (CPI) | No data. Government corruption remains a concern, with criticism that anti-corruption laws are being enforced unequally (Freedom House 2021).  |
| E-government development index    | Average level in the Caribbean region. It seems that no national ID has been issued, but a social security card has been issued.   |
| Rule of law                       | Criminals are generally punished according to the law.   |
| Citizen Security                  | Good compared to other Caribbean countries. The main crimes are organized crime and drug trafficking gangsters. The homicide rate is also lower than the Caribbean average, but higher than the world average. The homicide rate before and during COVID-19 is 3 / 100,000 in 2019 and 9 / 100,000 in 2020 (IDB 2021). |

Source: Survey Team

### 1.3.7 DX / Innovation

|                                 |   |                                     |
|---------------------------------|---|-------------------------------------|
| Basic indicators and statistics | E-government ranking <sup>1)</sup> : 98th         | Radar chart of e-government ranking |
|                                 | Mobile connection index <sup>2)</sup> :-          |                                     |
|                                 | Network Infrastructure Index:-                    |                                     |
|                                 | Internet user rate 76.0                           |                                     |
|                                 | Mobile connection rate 196.7                      |                                     |
|                                 | Fixed broadband rate 9.4                          |                                     |
|                                 | Increasing rate of Internet users 0.8 (2021/2020) |                                     |



**Communication network**

The state-owned Antigua Public Interest Business Authority (APUA) provides the foundation for the country's telecommunications infrastructure, but since 1997's decision to liberalize the telecommunications sector<sup>3)</sup>, FLOW (formerly brand name LIME, C & W), Digicel. Intensifying competition among the three companies has promoted both expansion of mobile phone services and feasible pricing, and the mobile penetration rate (number of subscribers / population) <sup>4)</sup> in 2017 was 180.4% in Latin America. And significant progress compared to 111.8% in the Caribbean.

On the other hand, the fixed broadband penetration rate is <sup>4)</sup> 8.8% and the mobile broadband penetration rate is 47.1%, which are significantly lower than the average penetration rate in the region <sup>4)</sup> 19.9% (fixed) and 89.5% (mobile), which is geographically an island country. And it is largely due to financial constraints <sup>5)</sup>. However, mobile broadband is expected to grow in the future as almost all populations are covered by LTE-based services. The LTE market was introduced in 2014 with an investment of \$ 37 million as part of FLOW's (then LIME) strategy to provide service upgrades, from 1992 to 20 when 2G was introduced. More than a year has passed.

As part of the liberalization of the telecommunications sector, at the end of 2012, the Government declared a partnership in telecommunications with the East Caribbean Telecommunications Bureau (ECTEL) <sup>6)</sup>, an external agency that oversees many other Caribbean telecommunications sectors. Signed. As a result, Antigua and Barbuda has gained an observer status within ECTEL and is making efforts to bring the country closer to the more liberalized telecommunications sector.

#### National Strategy for Digital Transformation

Antigua and Barbuda Medium-Term Strategic Development Plan <sup>7)</sup> (2016-2020) sets seven priorities as a national development policy. 1) Appropriate infrastructure, 2) Strong tourism industry as an economic anchor, 3) Greening, low density, high-end tourist destinations 4) Optimal use of marine space, 5) Export of non-tourism services, 6) Energy costs Reducing and improving energy safety, 7) better access to the right residential environment, the importance of ICT development to fulfill these priorities is recognized, especially for utilities such as electricity, water and telecommunications. It is an indispensable tool for improving the efficiency of delivery.

The national ICT regulator is the Ministry of Information, Broadcasting, Telecommunications and Information Technology <sup>8)</sup> (MIBTIT), which is responsible for policy and billing in this sector. In August 2016, public consultation<sup>10)</sup> was launched for a new telecommunications bill <sup>9)</sup> aimed at optimizing regulations, including consumer protection measures, to rebuild the telecommunications industry and liberalize the sector. , The annual bill is being discussed repeatedly.

#### Characteristic efforts

The Connect Antigua and Barbuda Initiative <sup>11)</sup> (CABI) was launched in 2006 with the aim of providing ICT access to all citizens and supporting the development of the country. Furthermore, the government has set out an ICT policy<sup>12)</sup> in education and is strengthening the use of ICT in education. CABI has been particularly focused on improving educational ICT accessibility for over a decade. Its main initiative is Early Childhood Education Technology (TECE) <sup>13)</sup>, which aims to provide public and private kindergartens with computers, broadband Internet access, required software, and ICT training for staff, as well as communication, education, and empowerment. There are two technologies for (TCEE) <sup>14)</sup>, and we are in the process of establishing a community access center (CAC) <sup>15)</sup> that provides free ICT lessons and instruction manuals nationwide.

#### source

1. E-Gov-Index: a composite indicator that consists of three indexes (Online Service Index, Telecommunication Infrastructure Index and Human Capital Index), which are equally weighted. It ranges from 0 to 1, with 1 being the most developed.
2. Mobile Connectivity Index: an input index developed by GSMA to measure the performance against the four key enablers of mobile internet adoption – infrastructure, affordability, consumer readiness and content. (<https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2016/06/Mobile-Connectivity-Launch-Report.pdf>)
3. Elementos destacados de los compromisos y las exenciones en la esfera de las telecomunicaciones básicas [https://www.wto.org/spanish/tratop\\_s/serv\\_s/telecom\\_s/telecom\\_highlights\\_commit\\_exempt\\_s.htm](https://www.wto.org/spanish/tratop_s/serv_s/telecom_s/telecom_highlights_commit_exempt_s.htm)
4. Measuring the Information Society Report Volume 2. ICT Country Profiles [https://www.itu.int/en/ITU-D/LDCs/Documents/2017/Country%20Profiles/Country%20Profile\\_Antigua%20and%20Barbuda.pdf](https://www.itu.int/en/ITU-D/LDCs/Documents/2017/Country%20Profiles/Country%20Profile_Antigua%20and%20Barbuda.pdf)
5. satellite-internet-in-antigua-barbuda <https://www.bcsatellite.net/satellite-internet-in-antigua-barbuda/>
6. ECTEL: Eastern Caribbean Telecommunications Authority <https://www.ectel.int/>
7. Medium-Term Development Strategy 2016 to 2020 [https://www.oneplanetnetwork.org/sites/default/files/antigua\\_barbuda\\_medium\\_term\\_development\\_strategy.pdf](https://www.oneplanetnetwork.org/sites/default/files/antigua_barbuda_medium_term_development_strategy.pdf)
8. Ministry of Information, Broadcasting, Telecommunications & Information Technology [https://ab.gov.ag/detail\\_page.php?page=23](https://ab.gov.ag/detail_page.php?page=23)
9. TELECOMMUNICATIONS BILL 2016 <http://legalaffairs.gov.ag/pdf/bills/TELECOMMUNICATIONS-BILL-2016-DRAFT-9-7th-November-2016.pdf>
10. Restructuring of the Telecommunications Industry [https://ab.gov.ag/notice\\_page.php?page=50](https://ab.gov.ag/notice_page.php?page=50)
11. Connect Antigua and Barbuda Initiative (CABI) [http://blacktiemagazine.com/society\\_2011\\_june/Antigua\\_high%20level\\_Visit.htm](http://blacktiemagazine.com/society_2011_june/Antigua_high%20level_Visit.htm)
12. ICT Policy in Education 2013 [https://planipolis.iiep.unesco.org/sites/default/files/ressources/antigua\\_ict-in-education-policy\\_2013.pdf](https://planipolis.iiep.unesco.org/sites/default/files/ressources/antigua_ict-in-education-policy_2013.pdf)
13. Technology for Early Childhood Education <https://education.gov.ag/departments/5e4af22efdddf70cd0d7fc39>
14. Technology for Communication, Education & Empowerment [https://issuu.com/antiguabarbuda0/docs/technology\\_for\\_communication\\_education\\_and\\_empowe](https://issuu.com/antiguabarbuda0/docs/technology_for_communication_education_and_empowe)
15. Community Computer Access Centers <https://www.connectantigua.com/antigua-and-barbuda/government-agencies/community-computer-access-centres>

### 1.3.8 Infrastructure and Energy

| Transport                                 |   |
|---|---|
| Overview                                  | Inland transportation is mainly by car.<br>The main public transportation is buses and taxis. There are domestic air routes between the islands.  |
| Leadership governance                     | Ministry of Public Utilities, Civil Aviation and Energy<br>Antigua and Barbuda Transport Board (ABTB)   |
| Major development partners                | No information  |
| Energy and electricity                    |   |
| Overview                                  | 49% of energy is consumed in the transportation sector.<br>The supply of both primary and electricity energy relies heavily on imported fossil fuels, with the exception of photovoltaics, which account for only 7% of electricity supply. |
| Carbon neutral national plan              | 2011 National Energy Policy<br>Renewable energy generation target: 15% by 2030  |
| Leadership governance and utility company | Ministry of Public Utilities, Civil Aviation and Energy<br>Antigua Public Utilities Authority (APUA)  |



|                            |             |
|----------------------------|-------------|
| Major development partners | UNDP / IADB |
|----------------------------|-------------|

Source: JICA Study Team with reference to various websites of the government organization and international organization (WB / IEA / IRENA / US DOE).

### 1.3.9 Tourism

The tourism sector of Antigua and Barbuda has the highest percentage of total employment among the 23 countries surveyed

|  |  |   |
|--|--|---|
| Number of international tourist arrivals (2019) <sup>1</sup> |  | 301,000   |
| International Tourism Receipts (2019) <sup>2</sup>           |  | USD 776 million   |
| Tourism Competitiveness Ranking (2019) <sup>3</sup>          |  | N / A   |
| Tourism Dependency Index (2019)                              |  | 55.1 (5th out of 166 countries)   |
| Government of Japan policy                                   | Number of JICA projects in the last 10 years   | none  |
|  | References to the Country Assistance Policy  | none  |
|  | Interest in pilot projects   | N / A   |
| Tourism industry vulnerability                               | Contribution of Travel & Tourism to GDP (2019)   | 42.7% (2nd out of 23 countries)   |
|  | Contribution of Travel & Tourism to employment (2019)  | 90.7% (1st out of 23 countries)   |
|  | Ratio of international spending (2019)   | 93% (3rd out of 23 countries)   |
|  | Top 3 countries of origin of visitors (2019) <sup>4</sup>  | USA (41.05%)<br>UK (25.53%)<br>Canada (12.37%)  |
| Importance of tourism  | Ratio of the budget amount of tourism-related ministries to the national budget amount (2019)            | 2.6% (6th out of 16 countries)<br>National budget: XCD 1,038,183,459<br>Budget of tourism-related ministries: XCD 27,300,000  |
|  | Whether or not it is mentioned as a priority sector in the National Economic and Social Development Plan | Yes<br>Plan name: Medium-Term Development Strategy 2016 to 2020<br>Reference example: As one of the Seven Flagship Priorities 2. Strong Tourism Industry as an Economic Anchor (p. 6) |
|  | Existence of effective national tourism policies / strategies / plans                                    | none  |
| Impact of COVID-19   | Changes in the contribution of Travel & Tourism to GDP (2019 → 2020)                                     | -53.0% (17th out of 23 countries)   |
|  | Changes in the contribution of Travel & Tourism to employment (2019 → 2020)                              | -25.1% (17th out of 23 countries)   |
| Number of government support measures for the tourism sector |  | N / A   |

Source: Survey Team

### 1.3.10 Public-private partnership

|  | item   | Contents    |
|--|--|-------------|
| No. of JICA Public-Private Partnership Projects (After 2012) | Cooperation preparatory survey (overseas investment and financing) (former PPP infrastructure project)           | 0 cases     |
|  | Overseas investment and loan   | 0 cases     |
|  | SME Partnership Promotion Survey (support for Small-sized Enterprise)  | 0 cases     |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for small- and medium- sized enterprise) | 0 cases     |
|  | SDGs Business Verification Survey with Private Sector (support for small- and medium- sized enterprise)          | 0 cases     |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for large enterprise)                    | 0 cases     |
|  | SDGs Business Verification Survey with Private Sector (support for large enterprise)                             | 0 cases     |
| Total number of Japanese private companies entering          | Total number of business locations   | 0 companies |
|  | Overseas branches of Japanese companies,   | 0           |

<sup>1</sup>“World Tourism Barometer”, Volume 18, Issue 7, Madrid, World Tourism Organization (UNWTO), 2020

<sup>2</sup>Ibid.

<sup>3</sup>“The Travel & Tourism Competitiveness Report 2019”, Geneva, World Economic Forum (WEF), 2019

<sup>4</sup>World Tourism Organization (2020), Yearbook of Tourism Statistics dataset [Electronic], UNWTO, Madrid, data updated on 17/11/2020

|                             |  |             |
|-----------------------------|--|-------------|
| the market<br>(2019 survey) | Local corporations wholly owned by Japanese companies and their branches                                       | 0 companies |
|                             | Branch offices wholly owned by Japanese companies and their branches   | 0 companies |
|                             | joint ventures (local corporations in which Japanese companies have a direct or indirect stake of 10% or more) | 0 companies |
|                             | joint ventures (Branch offices in which Japanese companies have a direct or indirect stake of 10% or more)     | 0 companies |
|                             | companies established overseas by Japanese nationals (in which Japanese nationals have a stake of 10% or more) | 0 companies |
|                             | Unknown classification   | 0 companies |
|                             | Number of Japanese residents<br>(2020 survey)  | Total       |
| Long-term residents         |  | 0 people    |
| Permanent resident          |  | 5 people    |
| Business Environment        | Doing Business 2020 Rank   | 113th place |
| PPP Project                 | Existence of PPP law scheme  | ×           |
|                             | PPP project with Japanese companies  | 0 cases     |





Gathering information about the PPP system

| N°  | Task Item   | Inquiries/comments/status<br>Title of submitted file   | Source/URL  |
|-----|---|--|---|
| 1   | <b>PRIORITY 4_PPP Sector</b>  |  |   |
| 1.1 | PPP Projects in selective countries<br>PPP rules and regulations in Central America and Caribbean Countries |  | All below can be useful   |
| A   | PPP laws and Regulations<br>if there is any, when, and how  | There is no PPP law  | <a href="https://pppknowledgelab.org/countries/antigua-and-barbuda">https://pppknowledgelab.org/countries/antigua-and-barbuda</a> |
| B   | PPP Unit Organization<br>if there is any, how structured  | There is no PPP Unit Organization  | <a href="https://pppknowledgelab.org/countries/antigua-and-barbuda">https://pppknowledgelab.org/countries/antigua-and-barbuda</a> |
| C   | PPP sectors<br>in what sectors are the PPPs allowed   | -  |   |
| D   | Proposal Types (Solicited or Unsolicited)<br>unsolicited  | -  |   |
| E   | PPP Forms<br>BOT,BTO,DB,,,what form are allowed   | -  |   |
| F   | PPP types<br>Availability payment, service purchase   | -  |   |
| G   | PPP Project Trends<br>how much PPP projects in the last 10 years  | -  |   |
| H   | Participation of Japanese firms in PPP Projects<br>if any (check news source)                               | -  |   |
|     | Any notable points for each country<br>if any   | The search was carried out on different official websites but it was not possible to find more information |   |

Source: Survey Team

## 2. Bahamas

### 2.1 Country overview

#### 2.1.1 Basic information

The Bahamas (English: Commonwealth of The Bahamas), commonly known as the Bahamas, is a nation that owns the Bahamas in the West Indies. It belongs to the Anglosphere, is a member of the Commonwealth of Nations, and is a constitutional monarchy that is a member of the Commonwealth of Nations. It is an island country, with the Florida Peninsula of the United States in the northwest, Cuba in the southwest, and Haiti in the southeast across the sea. The capital is Nassau, New Providence Island. Tourism and financial industries such as tax havens are central to the economy. Many tourists enjoy casinos, including the capital Nassau. In September 2016, the name of the company and individual who had established a paper company in the Bahamas was released by the release of the Bahamas document, which attracted attention. Since it is a former British territory, cars drive on the left side as in Japan, but geographically many cars are imported from the United States and many left-hand drive cars can be seen. The predominant theory is that the country name, the Bahamas, was changed from the Spanish word Baja mar (the sea where the water level dropped, the ebb tide).

#### 2.1.2 General circumstances

|             |   |                 |   |
|-------------|---|-----------------|---|
| 1 area      | 13,880 square kilometers (consisting of more than 700 small islands, almost the same as Fukushima Prefecture) | 2 Population    | 389,000 people (2019 World Bank)                                    |
| 3 Capital   | Nassau  | 4 ethnic groups | African (90.6%), European Caucasian (4.7%), mixed race (2.1%), etc. |
| 5 languages | English (official language)   | 6 religion      | Christianity (Protestant, Anglican Church, Catholic, etc.), etc.    |

Source: Ministry of Foreign Affairs HP Bahamas Country Basic Data

#### 2.1.3 Economic overview

|                          |  |                              |  |
|--------------------------|--|------------------------------|--|
| 1 Major industry         | Tourism and finance  | 2 GNI<br>3 GNI / person      | US \$ 123.08 billion (World Bank 2019)<br>US \$ 37,350 (2019, WDI) |
| 4 Economic growth rate   | 0.8% (2019 World Bank)   | 5 Unemployment rate          | 10.4% (2019 World Bank (Source ILO))                               |
| 6 Price increase rate    | 1.637% (2019 estimate IMF),  |                              |  |
| 7 Total trade amount     | Exports: US \$ 630 million (2018 WTO)<br>Import: US \$ 3,560 million (2018 WTO)  |                              |  |
| 8 Major trade items      | Export: Chemical products, industrial products, crude salt, crayfish, polystyrene products<br>Imports: Minerals / fuels, industrial products, transportation equipment, food   |                              |  |
| 9 Major trading partners | Exports: US, EU, Canada, South Africa (2015 WTO)<br>Imports: USA, EU, Dominican Republic, Japan  |                              |  |
| 10 currencies            | Bahamian dollar (BSD)  | 11 Foreign currency reserves | na   |
| 12 National budget       | USD1,814,028,016 (2019)  | 13 External debt balance     | na   |
| 14 Economic overview     | <p>(1) The Bahamas' economy has achieved stable growth, supported by the development of the tourism sector, which takes advantage of the terrain and climate. The government is working to promote the agricultural sector, manufacturing sector, financial sector, etc. due to the need for economic diversification, but there is still no change in the economic structure that is overly dependent on the tourism sector (the GDP contribution rate of the tourism sector is about about. 50%). The United States accounts for more than 80% of tourists and is easily affected by the US economy.</p> <p>(2) After the Lehman shock, the budget deficit expanded, and the debt-to-GDP ratio increased from about 37% in 2008 to about 75% in 2016.</p> <p>(3) Since Bahama has adopted a tax haven policy that exempts income tax, corporate tax, etc. in order to attract foreign companies and financial institutions, foreign banks and multinational companies have set up offices. , One of the most registered countries in the world in terms of the number of registered vessels. On the other hand, it depends on import duties and royalties for its financial income, and although it is not a member of the WTO, it is currently applying for membership.</p> |                              |  |

Source: Ministry of Foreign Affairs HP Bahamas Country Basic Data

## 2.1.4 Country-specific development cooperation policy

### (1) Government of Japan Development Cooperation Policy by Country

**Table 2-1 Overview of Japan's ODA to the Bahamas**

|   |  |
|---|--|
| <b>1. 1. Overview</b>   |  |
| Japan's economic cooperation with the Bahamas began in 1985 with the acceptance of trainees in the fields of public works, telecommunications / broadcasting, commercial trade, etc. as technical cooperation. The Bahamas has a high income level and graduated from the OECD / DAC's list of recipient countries / regions in 1996, so financial cooperation was difficult. We are cooperating with.  |  |
| <b>2. 2. Aim of development cooperation</b>   |  |
| There are many island nations in the Caribbean region where the members of the Caribbean Community (Calicom) including the Bahamas are located, and natural disasters such as hurricanes, earthquakes, and tsunamis occur frequently, and the sustainable use of marine biological resources is promoted. It has something in common with Japan in terms of promotion. In addition to being vulnerable to climate change and natural disasters, Calicom member countries are based on industries that have a small population and economy and are susceptible to external factors such as agriculture, fisheries, and tourism. All 14 countries are included in the list of small island developing states published by the United Nations Secretariat. In order to overcome the vulnerabilities peculiar to small island developing states in the Calicom countries, it is necessary to cooperate by utilizing Japan's technology and knowledge in addition to deepening bilateral relations and socio-economics of each country. It is important from the viewpoint of financial stability and sustainable growth of the entire region. |  |
| <b>3. 3. Basic policy</b>   |  |
| In the Development Cooperation Charter, even if the per capita income is at a certain level, for countries with special vulnerabilities such as small island developing states, necessary cooperation will be provided according to the actual development needs and burden capacity of each country. For the Caribbean Community (Calicom) member countries, the first pillar "Small Island Developing States Development" is based on the Japan-Calicom Joint Ministerial Statement adopted at the 4th Japan-Calicom Foreign Ministers' Meeting held in November 2014. We will develop cooperation that makes use of Japanese technology and knowledge for "cooperation for sustainable development including overcoming vulnerabilities peculiar to the country". The Bahamas, who have graduated from the OECD / DAC list of recipient countries / regions, will also be provided with the necessary cooperation based on the results of the survey on the need for assistance. We also reaffirmed that we will cooperate in accordance with this policy at the 5th Japan-Calicom Foreign Ministers' Meeting held in September 2016.  |  |
| <b>4. Priority areas</b>  |  |
| Disaster prevention / environment: Bahamas, a small island country, is vulnerable to natural disasters such as hurricanes and floods, and overcoming vulnerability to natural disasters, including the effects of climate change, is an important issue in terms of both adaptation and mitigation. Promote measures. In addition to managing waste for the sustainable development of the urban environment, we will promote energy conservation and conversion to renewable energy in order to reduce greenhouse gases and prevent natural disasters in response to rising sea levels. Provide support.   |  |

Source: Ministry of Foreign Affairs HP Bahamas Country Data Collection 2017

**Table 2-2 National Development Cooperation Policy for the Bahamas (September 2016)**

|   |  |
|---|--|
| <b>3. 3. Priority field (medium goal)</b> |  |
| (1) Disaster prevention / environment     | Overcoming vulnerability to natural disasters, including the effects of climate change, is an important issue, and measures will be promoted in terms of both adaptation and mitigation. We will support the promotion of energy conservation and the conversion to renewable energy for waste management, greenhouse gas reduction and natural disaster countermeasures for the sustainable development of the urban environment. |
| (2) Others                                | Bahama has a tourism and service industry as its main industry, and has an economic structure that is vulnerable to external factors such as the world economy and natural disasters. Natural disaster countermeasures and sustainable development of the urban environment are important issues. ...  |

Source: Survey Team

### (2) Survey on COVID-19 by development partners

We extracted sector names and specific quantitative figures that have a large impact on the country-specific analysis described in various reports of development partners. Reports from the World Bank, OECD, BCIE, SICA, and the Ministry of Economy, Trade and Industry of Japan suggest the importance of introducing digitalization and innovation (Fintech, Aggrotech, Autotech, etc.), and incorporate the survey results of these development partners. I arranged it accordingly.

World Bank: "Growth and Revitalization" 2021 Semi-Annual Economic Report (March 2021)

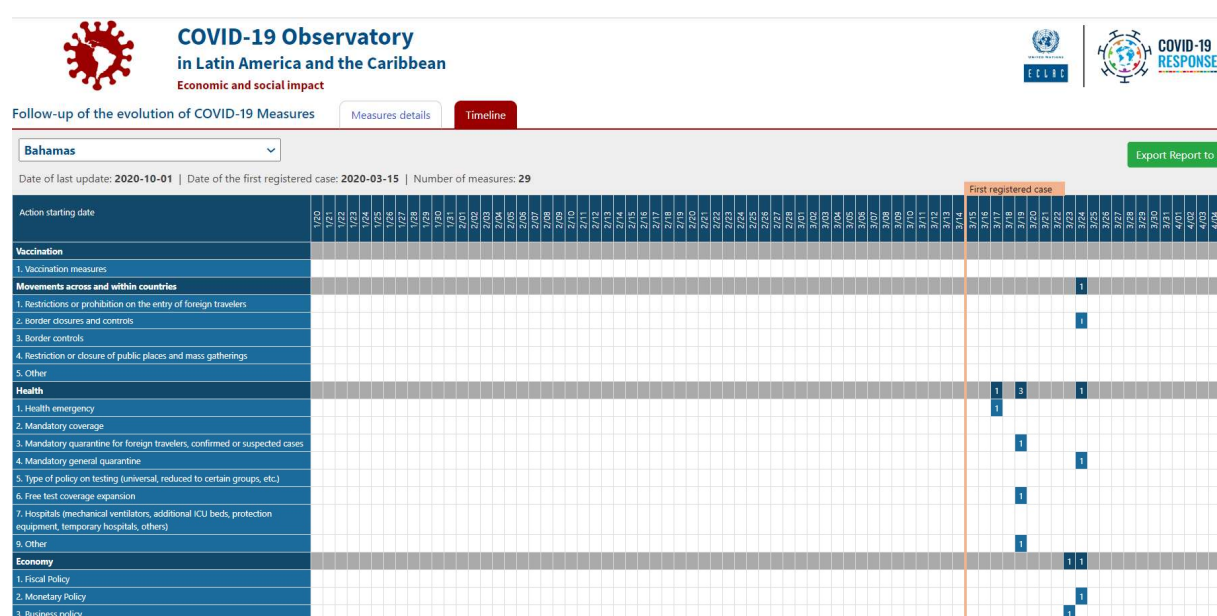
- ✓ OECD: COVID-19 in LAC, Regional socio-economic implications and policy priorities

(December 2020)

- ✓ BCIE: Impacto Económico del COVID-19 (April 2020)
- ✓ SICA: Estimación del Impacto Económico del COVID-19 en Centroamérica y República Dominicana (April 2020)
- ✓ Ministry of Economy, Trade and Industry of Japan: "Economic and Industrial Policy Based on the Impact of the New Corona Virus" (June 2020), Accelerating Digitization and Onlineization, Gig Economy, Innovation in the Transition to a New Everyday Life 1) Medical care / health, 2) Digital: Infrastructure development premised on the arrival of a digital society, 3) Green: Response to climate change problems, Energy security, 4) Emphasizes resilience.

## 2.1.5 Policies for COVID-19 measures taken by governments of each country

Various policies for COVID-19 taken by the government are described on the ECLAC homepage "COVID-19 Observatory" by country, time series, and field, and can be analyzed.



Source: <https://cepalstat-prod.cepal.org/forms/covid-countrysheet/index.html?table=2&country=BHS>

In this survey, the 16 policies implemented in the Bahamas posted on this website were classified by sector as much as possible.

### 1) Infection spread and alleviation of aggravation and death

No material was available.

### 2) Support for affected industries and people

**Table 2-3 Support for affected industries and people (Bahamas)**

| Various policies taken by the government (COVID-19 Observatory for LAC) |   |  |  |
|---|---|--|--|
| Socioeconomic policy  | 5 |  |  |
| Health care & nutrition   | 6 |  |  |
| Education   | 0 |  |  |
| Agriculture & rural development   | 0 |  |  |
| Private sector  | 4 |  |  |
| Environment & disaster prevention                                       | 0 |  |  |
| Governance and social security  | 0 |  |  |
| DX and innovation   | 0 |  |  |
| Infrastructure & energy   | 0 |  |  |
| Tourism Tourism   | 0 |  |  |
| PPP   | 0 |  |  |

|            |  |    |  |  |
|------------|--|----|--|--|
| Others (b) |  | 1  |  |  |
| total      |  | 16 |  |  |

Source: Survey Team

### 3) Arrangement of various policies for COVID-19 taken by the government

COVID-19 Observatory for Latin America and Caribbean (ECLAC) organized by governments

**Table 2-4 Government-directed COVID-19 Policy Categories (Bahamas)**

#### Follow-up of the evolution of COVID-19 Measures

| Vaccination   | Economy  | Social protection   |
|---|--|---|
| 1. Vaccination measures   | 1. Fiscal Policy   | 1. Cash transfers (new transfers, increase in existing transfers, expansion of cash transfers to new recipients, early disbursement of transfers) |
| <b>Movements across and within countries</b>  | 2. Monetary Policy   | 2. Food transfers / In-kind transfers   |
| 1. Restrictions or prohibition on the entry of foreign travelers  | 3. Business policy   | 3. Guarantee of basic services  |
| 2. Border closures and controls   | 4. Restriction of economic activity (including shops and shopping centers)                             | <b>Education / schools</b>  |
| 3. Border controls  | 5. Price and quantity controls   | 1. Suspension of classes  |
| 4. Restriction or closure of public places and mass gatherings  | 6. Economic Stimulus (includes aggregate value of fiscal measures and separately of credit guarantees) | 2. Provision of tools for distance learning (online platforms, TV, radio, distance-learning materials)  |
| 5. Other  | 7. Regulation of the personal hygiene and cleaning products market                                     | 3. Maintenance of school feeding programme (indicating under which modalities)  |
| <b>Health</b>   | 8. Debt relief and suspension of credit payments (individuals, microentrepreneurs)                     | <b>Gender</b>   |
| 1. Health emergency   | 9. Other   | 1. Gender-based violence against women  |
| 2. Mandatory coverage   | <b>Labor</b>   | 2. Care economy   |
| 3. Mandatory quarantine for foreign travelers, confirmed or suspected cases                                   | 1. Labor Protection  | 3. Employment and income generation   |
| 4. Mandatory general quarantine   | 2. Elective work leave   | 4. Benefits, transfers and other social protection measures   |
| 5. Type of policy on testing (universal, reduced to certain groups, etc.)                                     | 3. Reduction of working hours  | 5. Women's participation in the digital era   |
| 6. Free test coverage expansion   | 4. Prohibition of dismissal from work  | 6. Other  |
| 7. Hospitals (mechanical ventilators, additional ICU beds, protection equipment, temporary hospitals, others) | 5. Other   |   |

Source: Survey Team

## 2.2 Macroeconomic analysis and selection of priority countries

### 2.2.1 Macroeconomic analysis

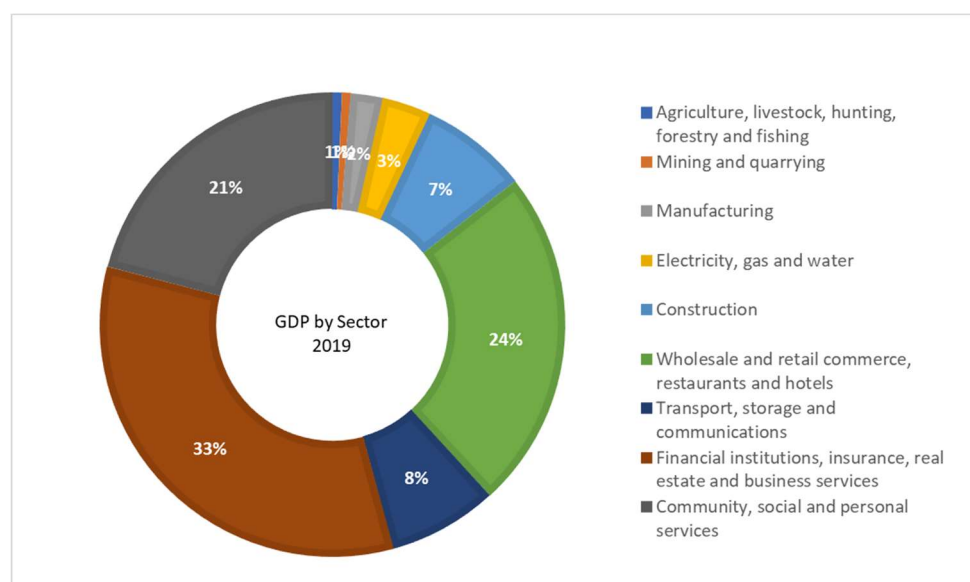
#### (1) Industrial composition

**Table 2-5 Industrial Composition (Bahamas)**

Table: Gross domestic product, by sector (Millones de dólares de Bahamas a precios constantes de 2012)

|  | 2011  | 2012  | 2013  | 2014  | 2015   | 2016   | 2017  | 2018   | 2019a/ | 2020 b/ |
|--|-------|-------|-------|-------|--------|--------|-------|--------|--------|---------|
| Agriculture, livestock, hunting, forestry and fishing                | 170   | 115   | 94    | 88    | 89     | 93     | 88    | 98     | 70     |         |
| Mining and quarrying   | 90    | 58    | 79    | 111   | 71     | 30     | 22    | 60     | 62     |         |
| Manufacturing  | 295   | 316   | 278   | 296   | 260    | 361    | 355   | 300    | 240    |         |
| Electricity, gas and water   | 178   | 229   | 270   | 282   | 258    | 353    | 354   | 441    | 361    |         |
| Construction   | 670   | 795   | 736   | 753   | 530    | 558    | 645   | 579    | 790    |         |
| Wholesale and retail commerce, restaurants and hotels                | 1,926 | 2,280 | 2,144 | 2,198 | 2,451  | 2,518  | 2,207 | 2,503  | 2,518  |         |
| Transport, storage and communications                                | 583   | 814   | 952   | 1,068 | 1,062  | 994    | 894   | 892    | 809    |         |
| Financial institutions, insurance, real estate and business services | 2,348 | 3,235 | 3,135 | 3,166 | 3,410  | 3,341  | 3,350 | 3,383  | 3,522  |         |
| Community, social and personal services                              | 1,491 | 1,920 | 1,874 | 1,900 | 1,957  | 2,014  | 2,067 | 2,017  | 2,220  |         |
| Total  | 7,752 | 9,762 | 9,563 | 9,861 | 10,086 | 10,261 | 9,982 | 10,272 | 10,591 | 0       |

Source: ECLAC



Source: Survey Team

## (2) Trends in major economic indicators

**Table 2-6 Trends in Major Economic Indicator (Bahamas)**

Table 1 BAHAMAS: MAIN ECONOMIC INDICATORS (Annual growth rates)

|  | 2011     | 2012     | 2013     | 2014     | 2015     | 2016     | 2017     | 2018     | 2019a/   | 2020 b/  |
|--|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|
| Gross domestic product (Annual growth rates c/)                                      | 0.6      | 0.0      | -3.0     | 0.7      | 0.6      | 0.4      | 0.1      | 1.6      | 1.2      | -14.5    |
| Per capita gross domestic product (Annual growth rates c/)                           | -0.7     | 2.0      | -3.9     | -0.2     | -0.4     | -0.5     | -0.9     | 0.5      | 0.2      | -15.5    |
| Gross domestic product, by sector (Annual growth rates c/)                           |          |          |          |          |          |          |          |          |          |          |
| Agriculture, livestock, hunting, forestry and fishing                                | -7.9     | 4.0      | -18.6    | -6.0     | 0.7      | 5.2      | -5.3     | 11.1     | ...      | ...      |
| Mining and quarrying   | -17.2    | -14.7    | 37.8     | 40.2     | -36.0    | -57.7    | -27.6    | 173.9    | ...      | ...      |
| Manufacturing  | 0.3      | 13.4     | -11.9    | 6.3      | -12.2    | 39.0     | -1.6     | -15.6    | ...      | ...      |
| Electricity, gas and water   | 10.6     | -5.0     | 18.3     | 4.3      | -8.5     | 36.7     | 0.3      | 24.7     | ...      | ...      |
| Construction   | 9.4      | 13.2     | -7.4     | 2.3      | -29.7    | 5.3      | 15.6     | -10.2    | ...      | ...      |
| Wholesale and retail commerce, restaurants and hotels                                | -3.1     | 5.5      | -6.0     | 2.5      | 11.5     | 2.7      | -12.3    | 13.4     | ...      | ...      |
| Transport, storage and communications  | 8.9      | 3.7      | 17.1     | 12.1     | -0.6     | -6.4     | -10.0    | -0.2     | ...      | ...      |
| Financial institutions, insurance, real estate and business services                 | 2.8      | -3.4     | -3.1     | 1.0      | 7.7      | -2.0     | 0.3      | 1.0      | ...      | ...      |
| Community, social and personal services  | 1.1      | -0.5     | -2.4     | 1.4      | 3.0      | 2.9      | 2.6      | -2.5     | ...      | ...      |
| Balance of Payments (Millions of dollars)  |          |          |          |          |          |          |          |          |          |          |
| Current account balance  | -1,192.8 | -1,504.7 | -1,516.2 | -2,192.5 | -1,610.6 | -710.7   | -1,509.2 | -1,487.5 | 83.7     | -1,977.0 |
| Goods balance  | -2,132.2 | -2,401.5 | -2,211.0 | -2,510.3 | -2,433.5 | -2,150.2 | -2,538.4 | -2,675.1 | -2,312.8 | -1,741.4 |
| Exports, f.o.b.  | 833.5    | 984.0    | 954.9    | 833.9    | 520.5    | 481.4    | 570.6    | 641.7    | 653.7    | 410.6    |
| Imports, f.o.b.  | 2,965.7  | 3,385.5  | 3,165.9  | 3,344.2  | 2,954.0  | 2,631.6  | 3,109.0  | 3,316.8  | 2,966.5  | 2,152.0  |
| Services trade balance   | 1,201.2  | 1,153.9  | 894.8    | 689.0    | 1,280.5  | 1,564.3  | 1,445.1  | 1,938.3  | 2,097.6  | ...      |
| Income balance   | -225.6   | -267.6   | -221.1   | -378.0   | -363.3   | -439.9   | -360.7   | -682.2   | -547.3   | ...      |
| Net current transfers  | -36.2    | 10.5     | 21.1     | 6.7      | -94.3    | 315.1    | -55.2    | -68.6    | 846.2    | ...      |
| Capital and financial balance (Millions of dollars)                                  |          |          |          |          |          |          |          |          |          |          |
| Net foreign direct investment d/   | 668.6    | 530.2    | 687.5    | 475.0    | 526.1    | 390.4    | 304.6    | 491.4    | 264.6    | ...      |
| Other capital movements d/   | 548.6    | 899.7    | 760.3    | 1,763.7  | 1,108.3  | 412.5    | 1,717.9  | 775.3    | 213.7    | ...      |
| Foreign remittance from abroad for 2019 and 2020                                     | 991.6    | 1,162.3  | 1,226.7  | 1,860.7  | 1,271.0  | 363.0    | 1,661.8  | 584.5    | -69.0    | ...      |
| Microfinance dispatched and the sectors that received microfinance for 2019 and 2020 | ...      | ...      | ...      | ...      | ...      | ...      | ...      | ...      | ...      | ...      |

Source: Economic Survey of Latin America and the Caribbean 2020: Main conditioning factors of fiscal and monetary policies in the post-COVID-19 era

### 2.2.2 Impact analysis and identification of key sectors

#### (1) Impact assessment results for each sector by AHP analytic hierarchy process based on economic indicators

**Table 2-7 Results of Sector Impact Analysis by COVID-19 (Bahamas)**

| ECLAC category   | Changes around COVID-19 | Trends before COVID-19 | Total GDP ratio of the sector | comprehensive evaluation |   |
|--|-------------------------|------------------------|-------------------------------|--------------------------|---|
| Importance (weight)  | 0.4590                  | 0.0660                 | 0.0750                        |                          |   |
| Agriculture, livestock, hunting, forestry and fishing                |                         | 1                      | 2                             | 0.0048                   | 3 |
| Mining and quarrying   |                         | 9                      | 1                             | 0.015                    | 9 |
| Manufacturing  |                         | 6                      | 3                             | 0.014                    | 8 |
| Electricity, gas and water   |                         | 8                      | 4                             | 0.018                    | 7 |
| Construction   |                         | 2                      | 5                             | 0.0113                   | 2 |
| Wholesale and retail commerce, restaurants and hotels                | 8                       | 5                      | 8                             | 0.237                    | 1 |
| Transport, storage and communications                                | 9                       | 7                      | 6                             | 0.2633                   | 6 |
| Financial institutions, insurance, real estate and business services |                         | 3                      | 9                             | 0.019                    | 4 |
| Community, social and personal services                              |                         | 4                      | 7                             | 0.0175                   | 5 |

Source: Survey Team

#### 1) ECLAC Sector Classification Amendments to the Sector Classification

In line with the method described in the main volume, the Sector Classification is divided into the Vertical Sector and the Cross-Cutting Sector, the ECLAC classification sector is allocated to the Vertical Sector Classification, and the evaluation of various policies related to COVID-19 taken by the government along with the results of the partner survey and the indicators of the national development



cooperation policy, the ranking of priority sectors are calculated using the four indicators, which are described in the table below.

**Table 2-8 Ranking of Priority Sectors (Bahamas)**

|                                   | Economic Indicator Analysis | Government Policy on COVID-19 | Survey on COVID-19 by Development Partners | Country Development Cooperation Policy | Base Case |   | Priority |
|-----------------------------------|-----------------------------|-------------------------------|--|--|-----------|---|----------|
| Importance (weight)               | 0.6000                      | 0.2000                        | 0.1000                                     | 0.1000                                 |           |   |          |
| Social and Economic Policy        | 0.0000                      | 0.0625                        | 0.0000                                     | 0.0000                                 | 0.0625    |   | ○        |
| Health and Nutrition              | 0.0387                      | 0.0750                        | 0.0125                                     | 0.0000                                 | 0.1262    | 3 | ○        |
| Education                         | 0.0319                      | 0.0000                        | 0.0000                                     | 0.0000                                 | 0.0319    | 6 |          |
| Agriculture and Rural Development | 0.0965                      | 0.0000                        | 0.0000                                     | 0.0000                                 | 0.0965    | 5 |          |
| Manufacturing                     | 0.1388                      | 0.0500                        | 0.0125                                     | 0.0333                                 | 0.2346    | 2 | ○        |
| Environment/ Disaster Management  | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0333                                 | 0.0333    |   | ○        |
| Governance and Security           | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0000                                 | 0.0000    |   | ○        |
| DX Innovation                     | 0.0000                      | 0.0000                        | 0.0375                                     | 0.0000                                 | 0.0375    |   | ○        |
| Infrastructure and Every          | 0.2415                      | 0.0000                        | 0.0125                                     | 0.0000                                 | 0.2540    | 1 | ○        |
| Tourism                           | 0.0526                      | 0.0000                        | 0.0250                                     | 0.0333                                 | 0.1110    | 4 |          |
| Public-Private Partnership        | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0000                                 | 0.0000    |   | ○        |

Source: Survey Team

## (2) Sensitivity analysis

### 1) Analysis case settings

Based on the above methodology, the following case settings were made.

**Table 2-9 Sensitivity Analysis Case-based Weighting Settings (Bahama)**

|  | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|--|-----------|------------------------|------------------------|------------------------|
| Economic indicator analysis  | 0.6       | 0.6                    | 0.5                    | 0.5                    |
| Investigation and arrangement of various policies for COVID-19 taken by the government | 0.2       | 0.1                    | 0.1                    | 0.1                    |
| Development partner survey results   | 0.1       | 0.2                    | 0.2                    | 0.3                    |
| Country-specific development cooperation policy  | 0.1       | 0.1                    | 0.2                    | 0.1                    |

Source: Survey Team

### 2) Summary of sensitivity analysis

The results of each sensitivity analysis are as summarized below. Sensitivity analysis did not show much change, which was close to the result of the base case.



**Table 2-10 Summary of Sensitivity Analysis Results (Bahamas)**

|                                   | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|-----------------------------------|-----------|------------------------|------------------------|------------------------|
| Social and economic policy        |           |                        |                        |                        |
| Health care / nutrition           | 3         | 4                      | 4                      | 4                      |
| education                         | 6         | 6                      | 6                      | 6                      |
| Agriculture / rural development   | 5         | 5                      | 5                      | 5                      |
| Manufacturing industry            | 2         | 2                      | 1                      | 2                      |
| Environment / disaster prevention |           |                        |                        |                        |
| Governance and citizen security   |           |                        |                        |                        |
| DX / Innovation                   |           |                        |                        |                        |
| Infrastructure and Energy         | 1         | 1                      | 2                      | 1                      |
| sightseeing                       | 4         | 3                      | 3                      | 3                      |
| Public-private partnership        |           |                        |                        |                        |

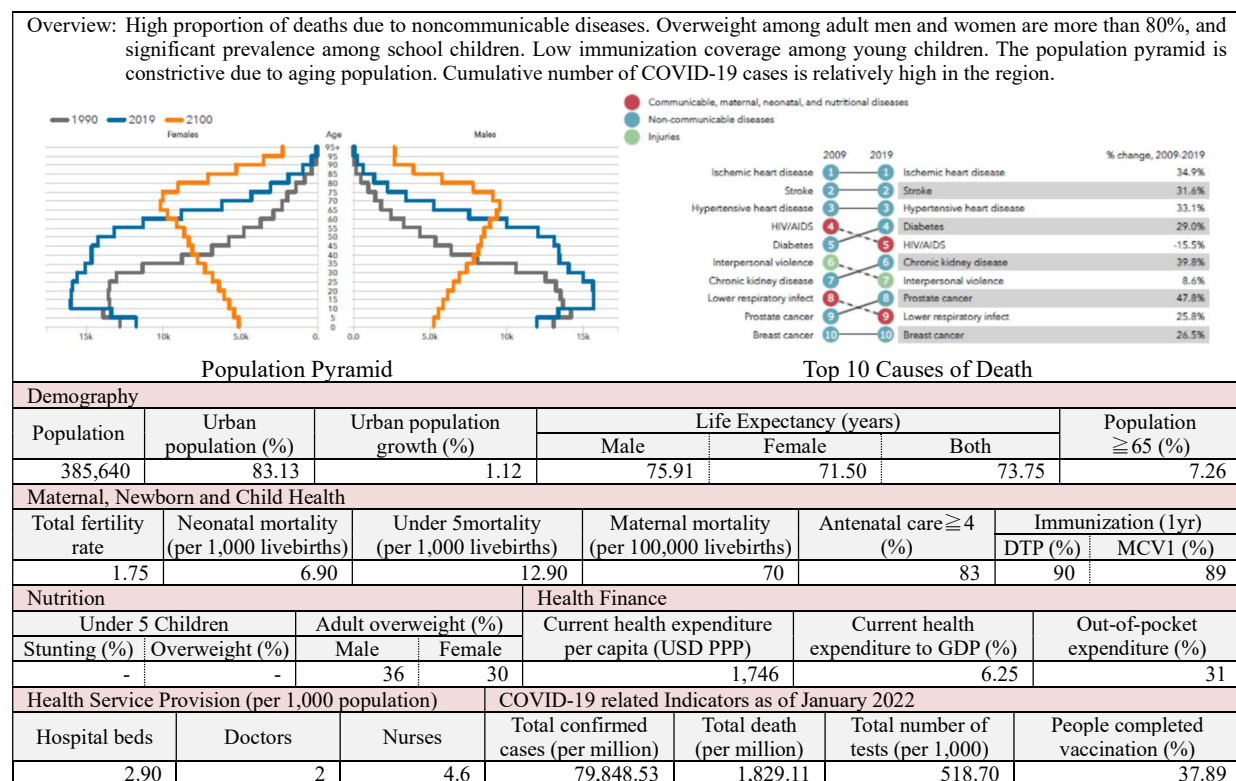
Source: Survey Team

### **(3) Selection of priority sectors by country**

From the above results, 1) social / economic policy, 2) manufacturing industry, 3) environment / disaster prevention, 4) governance / citizen security, 5) DX / innovation, 6) infrastructure / energy, 7) tourism, 8) public-private partnership are selected as priority sectors.

## 2.3 Country-specific information by sector

### 2.3.1 Health care / nutrition



Source: Graphs=Institute for Health Metrics and Evaluation, County Profile; Demography, Total fertility rate, Neonatal mortality, under-5 mortality, Health finance= World Development Indicators, the World Bank (Accessed on Aug 2021); Maternal mortality= UNICEF (Sep 2019); Antenatal care, Immunization, Nutrition, Health service provision,= OECD/The World Bank (2020), Health at a Glance: Latin America and the Caribbean 2020; COVID-19 related indicators= Our World in Data (Accessed on Jan 2022)

| Health                                  |  |
|---|--|
| Leadership/ Governance                  | Responsible Agency: Ministry of Health, Centralized<br><a href="http://www.bahamas.gov.bs/health">http://www.bahamas.gov.bs/health</a><br>Under the Health in All Policies, the Prime Minister's office leads inter-sectoral collaboration for health development.<br>Major Relevant Policies: Initiatives/ Programs seem to focus on childcare, school health and health life-style<br>National Health Service Strategic Plan 2010-2020 |
| Service Providing System                | The public hospital bureau has authority over the public sector, and the referral system, headed by a well-developed national referral hospital, is functioning. This is considered to be one of the most successful models in the region. The private sector is also expanding.   |
| Health Finance                          | National Health Insurance was established in 2016, but still low coverage. Financial sources still rely on government budget, OOP and private sector.<br>National health insurance, but low coverage<br>The poor and patients of the selected illness could receive free medication excluding drugs and overseas treatment.  |
| Human Resource for Health               | Doctors and nurses are educated in Europe and the United States.   |
| IT/ Digital Health                      | Well-developed health information management system. The National Health Insurance (NIH) Authority introduced e-health record in 2019 (eClinicalWorks, US).  |
| Drugs/ Medical Equipment                | Advanced medical equipment has been introduced to respond the needs of the people.   |
| Priority                                | Noncommunicable diseases (diabetes and ischemic health diseases), trauma caused by violence, HIV/AIDS  |
| Communicable Disease Emergency Response | Necessary action and responses are undertaken along with IHR including disaster and health emergency preparedness.   |
| Major Development Partners              | PAHO/WHO, PEPFAR (The U.S. President's Emergency Plan for AIDS Relief), etc.<br>Under Healthy Bahamas Coalition established by the Ministry of Health, public, private, and civil society sectors, as well as international organizations maintain good collaboration for some health issues such as noncommunicable disease prevention and control.   |

|                           |   |
|---------------------------|---|
| Nutrition                 |   |
| Institutional Arrangement | Nutrition Unit of the Ministry of Health<br>The Ministry of Health in collaboration with FAO is developing food, and nutrition security policy. |
| Major Relevant Policies   | No information  |
| Human Resource            | No information  |

Source: Survey Team with reference to WHO Country Cooperation Strategy for Bahamas at a glance, May 2018, Institute for Health Metrics and Evaluation, County Profile, The Borgen Project, 9 Facts About Health Care in The Bahamas, WHO, Global atlas of medical devices, 2017, NIH Website (<https://www.nhibahamas.gov.bs/nhi-launch-ehr/>), and WHO, Nutrition Landscape Information System (NLIS)

## 2.3.2 Education

|   |   |  |               |                 |                 |
|---|---|--|---------------|-----------------|-----------------|
| Overview  |   |  |               |                 |                 |
| Number of children  | Education level   | Preschool  | primary       | Lower secondary | Upper secondary |
|   | 2018  | 3,594 people   | 29,504 people | 13,603 people   | 13,281 people   |
| Source: Institute for Statistics (UIS), UNESCO Bureau of Statistics |   |  |               |                 |                 |
| Government authority  | Ministry of Education   |  |               |                 |                 |
| Education indicator   | Net school enrollment rate: 74.23% for primary school, 62.5% for secondary school (World Bank, year unknown)<br>Primary education completion rate (2018) 76.5%  |  |               |                 |                 |
| Impact of COVID-19  |   |  |               |                 |                 |
| School closure / reopening  | Completely closed on March 11, 2020 and partially reopened on February 22, 2021. From March 11, 2020 to February 2, 2021, 95 days of complete closure and 71 days of partial closure, for a total of 166 days. The new semester, which started in September 2021, started with a hybrid learning style, but changed to a remote learning from October 25th. |  |               |                 |                 |
| COVID-19 measures   | N / A   |  |               |                 |                 |
| Distance education  | Implementation status   | Established a virtual platform for primary and lower secondary schools. In addition, lessons are distributed on TV and radio, and printed teaching materials are distributed. A digital learning guide is posted on the portal site of the Ministry of Education. Digital teaching materials are prepared for 10th grade from kindergarten for teachers. Universities carry out both online and face-to-face lessons by hybrids. |               |                 |                 |
|   | Access  | Since it is an archipelago, some islands lack ICT equipment, and the knowledge and skills of teachers to utilize them (IDB).   |               |                 |                 |
|   | Teacher training  | N / A  |               |                 |                 |
| School hygiene  | Infection control measures  | Safe School Reopening Strategic Plan (Created by the Caribbean Community (CARICOM))  |               |                 |                 |
|   | Facility maintenance  | N / A  |               |                 |                 |
| School lunch / nutrition  | N / A   |  |               |                 |                 |
| Countermeasures for vulnerable people                               | N / A   |  |               |                 |                 |
| Support for donors, etc.  | N/A   |  |               |                 |                 |

Source: Survey Team

## 2.3.3 Agriculture / rural development

|   |  |      |      |
|---|--|------|------|
| Urban / rural population ratio                | 83.0% / 17.0% (FAOSTAT 2018)                                       |      |      |
| Agricultural land area                        | 14,000 ha (FAOSTAT 2019) 1)  |      |      |
| Agricultural sector employment                | 3.7% of total employment (FAOSTAT 2011) 2)                         |      |      |
| Agricultural GDP                              | 0.6% of total GDP (World Bank 2019) 7)                             |      |      |
| Of the agricultural sector Value added amount | \$ 75,696.95 thousand (including forestry) (World Bank 2019) 3)    |      |      |
| Agricultural sector expenditure ratio         | Ratio of agricultural fiscal expenditure to national budget (%) 4) |      |      |
|   | 2018   | 2019 | 2020 |
|   | 1.17   | 1.11 | 0.96 |

|   |  |          |          |          |          |          |
|---|--|----------|----------|----------|----------|----------|
| Agricultural sector import / export balance       | Trade balance (USD1,000, FAOSTAT) 5)   |          |          |          |          |          |
|   |  | 2015     | 2016     | 2017     | 2018     | 2019     |
|   | export   | 4,169    | 11,223   | 9,792    | 9,581    | 10,225   |
|   | Import   | 597,165  | 405,365  | 469,222  | 444,244  | 458,939  |
|   | Balance of payments  | -592,996 | -394,142 | -459,430 | -434,663 | -448,714 |
| Agricultural development Policy / plan / strategy | <p>The agricultural sector accounts for 0.6% (2019) 6) of the Bahamas' GDP, well below the Caribbean average of 4.3% (2019). The ratio of agricultural workers to the total number of employees in 20197) was 2.2%, which is far below the regional average of 10.7%. According to a report by the US Bureau of Foreign Trade8), about 90% of food products depend on imports, of which 80% are from the United States. To strengthen market access for local producers to strengthen food security and promote economic diversification, the Bahamian government said, "Foreign investors use 40% of the food they need for their businesses, local farmers and fishermen. Must be purchased from. " Some international companies comply with this as part of their "corporate social responsibility", but compliance is limited due to the lack of legal basis for the policy.</p> <p>The Food and Nutrition Security Policy (FNSP) 2017-20229) is a cross-sectoral national policy that ensures that people consume safe and nutritious foods for a healthy and vibrant life. The purpose is to be able to do it. In order to carry out with a "government-wide" and "society-wide" approach, the implementation of related activities is led by the National Food and Nutrition Coordination Commission, which consists of public and private stakeholders and non-governmental organizations. "Safe and secure" with the enhancement of "food consumption and utilization", "food production", "affordable food", "food stability" and "government" as strategic axes to achieve the purpose. "Promoting the availability of nutritious locally produced foods", "Encouraging domestic production of not only marine products but also root vegetables, fruits and vegetables", "Maintaining the highest food standards from production to consumption", Ensuring the safety of all foods, including imported foods. "</p> <p>The Ministry of Agriculture and Marine Resources "Five-Year Sector Strategic Plan 2010-201410)" aims to secure the development of the aquaculture sector through sustainable use and integrated management of coastal areas and marine environments. Activities also include establishing a training system to properly train nationally certified fishermen and crew.</p> <p>The Caribbean Agricultural Research and Development Institute (CARDI), which Bahama is a member of, is a research and development institute that aims to improve the competitiveness and sustainability of the regional agricultural sector, and was established in 1974 by 12 member countries of CARICOM. Was done. To transform the agricultural sector into a modernized, competitive, innovative and resilient one, CARDI has developed a five-year roadmap, Strategic Plan 2018-202211). CARDI divides the member countries into three groups based on the economic structure of each country, and the Bahamas belongs to the second group. One of the group's strategies is partnership with the private sector, which also includes agritourism and industrial development.</p> |          |          |          |          |          |
| Impact of COVID-19                                | <p>COVID-19 caused a sharp rise in unemployment and increased food insecurity in the Caribbean. In the Bahamas, as a result of the approval of self-sufficient fishing as an emergency response, many people are seeking food from the sea. According to monitoring12) conducted during the 12 weeks during the countermeasures, the catch increased sharply in the first 3 weeks and reached 3.4 times compared to the following weeks, while 90% of the fish size was legal. It is below the minimum fish size, resulting in a 22% reduction in overall catch. From this result, the fishing industry functions as a "natural insurance" in the event of an unforeseen event, and also serves as a source of resilience for the small island community in the event of an emergency, and at the same time, without proper management. It has also been shown that it also causes the consequences of promoting overfishing of resources.</p> <p>According to the results of the "Consumer Behavior Questionnaire Survey13)" conducted by the United Nations World Food Program from March to April 2020, the main foods (80%) and fresh foods were found. Many things were always available, including (71%), pharmaceuticals (79%) and perishables (53%), and the situation was reported to be much better than the regional average. On the other hand, 66% of all respondents felt that "food prices were rising", so there is concern that even if there are goods, they will not be available for economic reasons.</p>   |          |          |          |          |          |
| Source / reference                                | <p>1) FAOSTAT-Land, Input and Sustainability-Land Use-Area-Agriculture (<a href="https://www.fao.org/faostat/en/#data/RL">https://www.fao.org/faostat/en/#data/RL</a>)</p> <p>2) FAOSTAT-Share of employment in agriculture (% of total employment) &amp; Share of female employment in agriculture (% of employment in agriculture) (<a href="https://www.fao.org/faostat/en/#data/OE">https://www.fao.org/faostat/en/#data/OE</a>)</p> <p>3) Agriculture, forestry, and fishing, value added (constant 2015 US \$) --Latin America &amp; Caribbean (<a href="https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart">https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart</a>)</p> <p>4) FAOSTAT-Government Expenditure-Share of Total Expenditure-Central Government (<a href="https://www.fao.org/faostat/en/#data/IG">https://www.fao.org/faostat/en/#data/IG</a>)</p> <p>5) FAOSTAT-Trade-Crops and livestock products-Import / Export Value-Agricultural Products (<a href="https://www.fao.org/faostat/en/#data/TCL">https://www.fao.org/faostat/en/#data/TCL</a>)</p> <p>6) Agriculture, forestry, and fishing, value added (% of GDP) --Bahamas, The, Caribbean small states (<a href="https://data.worldbank.org/indicator/NV.AGR.TOTL.ZS?locations=BS-S3&amp;view=chart">https://data.worldbank.org/indicator/NV.AGR.TOTL.ZS?locations=BS-S3&amp;view=chart</a>)</p> <p>7) Employment in agriculture (% of total employment) (modeled ILO estimate) --Bahamas, The, Caribbean small states (<a href="https://data.worldbank.org/indicator/SL.AGR.EMPL.ZS?end=2019&amp;locations=BS-S3&amp;start=1991&amp;view=chart">https://data.worldbank.org/indicator/SL.AGR.EMPL.ZS?end=2019&amp;locations=BS-S3&amp;start=1991&amp;view=chart</a>)</p> <p>8) Bahamas --Agricultural Sectors, International Trade Administration (<a href="https://www.trade.gov/country-commercial-guides/bahamas-agricultural-sectors">https://www.trade.gov/country-commercial-guides/bahamas-agricultural-sectors</a>)</p> <p>9) Food and Nutrition Security Policy and Action Plan for the Commonwealth of the Bahamas 2017-2022</p>   |          |          |          |          |          |

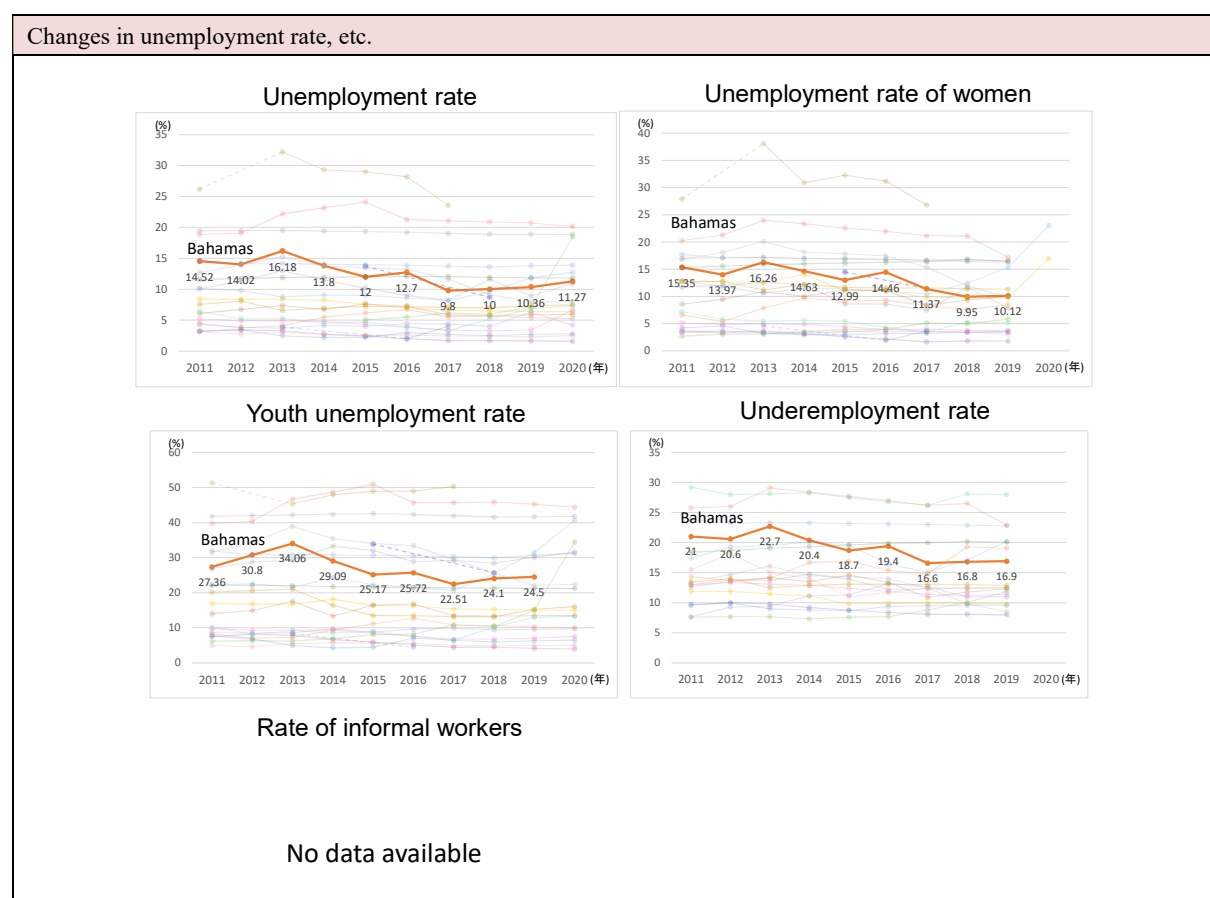
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|  | <a href="http://faolex.fao.org/docs/pdf/bha181440.pdf">http://faolex.fao.org/docs/pdf/bha181440.pdf</a><br>10) Five Year Sector Strategic Plan 2010–2014 of the Ministry of Agriculture & Marine Resources<br><a href="http://faolex.fao.org/docs/pdf/bha176952.pdf">http://faolex.fao.org/docs/pdf/bha176952.pdf</a><br>11) CARDI's Strategic Plan 2018–2022 ( <a href="http://www.cardi.org/wp-content/uploads/downloads/2018/05/CARDI-Strategic-Plan-2018-to-2022-Final.pdf">http://www.cardi.org/wp-content/uploads/downloads/2018/05/CARDI-Strategic-Plan-2018-to-2022-Final.pdf</a> )<br>12) Impact of the COVID-19 pandemic on a queen conch ( <i>Aliger gigas</i> ) fishery in The Bahamas, 2021, Nicholas D Higgs<br><a href="https://peerj.com/articles/11924/">https://peerj.com/articles/11924/</a> )<br>13) Caribbean COVID-19 Food Security & Livelihoods Impact Survey Bahamas Summary Report   May 2020<br><a href="https://docs.wfp.org/api/documents/WFP-0000116247/download/">https://docs.wfp.org/api/documents/WFP-0000116247/download/</a> ) |
|--|--|

### 2.3.4 Private sector

The Bahamas is not large (12th) but has the highest GDP per capita (1st) and the highest minimum wage (1st). GDP per capita and minimum wage are overwhelmingly high in the region, and it can be seen that economic development is completely different from other countries. On the other hand, the unemployment rate and underemployment rate are high. The female unemployment rate and the youth unemployment rate are declining year by year, but the unemployment rate has increased slightly since 2017. It is characteristic that there is no significant difference between the total unemployment rate and the female unemployment rate over the last decade.

|              | Index                      | Value  | Ranking                 | Year | Source                            |
|--------------|----------------------------|--------|-------------------------|------|-----------------------------------|
| Productivity | GDP per capita (USD)       | 28,608 | 1 (Among 22 countries)  | 2020 | World Bank                        |
|              | GDP per worker (USD)       | 70,047 | 1 (Among 18 countries)  | 2019 | World Bank                        |
| employment   | Minimum wage (USD / month) | 840    | 1 (Among 23 countries)  | 2019 | ILO                               |
|              | Unemployment rate          | 10.36  | 16 (Among 22 countries) | 2019 | Statista                          |
|              | Female unemployment rate   | 10.12  | 15 (Among 22 countries) | 2019 | The Global Economy                |
|              | Youth unemployment rate    | 24.5   | 15 (Among 22 countries) | 2019 | Federal Reserve Bank of St. Louis |
|              | Underemployment rate       | 16.9   | 12 (Among 18 countries) | 2019 | ILO                               |
|              | Informal worker rate       | —      | — (Among 12 countries)  | —    | —                                 |

Source: Described in the table



Source: World Bank, ILO, The Global Economy, etc.

### 2.3.5 Environment / Disaster Management

|                     | item   | data   | remarks                          |
|---------------------|--|--|----------------------------------|
| Environment         | Environmental agency                                     | The Ministry of Environment and Housing  |                                  |
|                     | Waste-related organizations                              | The Ministry of Environment and Housing<br>Department of Environmental Health Services |                                  |
|                     | Environmental Budget (USD)                               | 2019: 120,352,101<br>2020: 84,200,631<br>2021:-<br>Three-year average:<br>102,276,366  | Average: 3rd out of 23 countries |
|                     | Environmental budget per capita (2019-2021 average, USD) | 9.0 9.0  | 11th out of 23 countries         |
|                     | Budget ratio to national budget (2019)                   | 6.63%  | 1st out of 23 countries          |
|                     | Donor support status                                     | 1  | As of May 2021                   |
|                     | Renewable energy power generation (GWh) (2019)           | 3  | IRENA, 2021                      |
|                     | Geothermal power generation capacity (MWe)               | 2020: 0<br>2025 Forecast: 0  | WGC, 2020                        |
| Disaster Management | Disaster prevention organization                         | The National Emergency Management Agency (NEMA)  |                                  |
|                     | Donor support status                                     | 5 cases  | As of May 2021                   |
|                     | Number of natural disasters (2010-2020)                  | 1<br>Major disasters: floods   |                                  |
|                     | Number of victims (persons) per 100,000 population       | 9 people   | 16th out of 23 countries         |

Source: Survey Team

### 2.3.6 Governance and citizen security

| Item   | Overview  |
|--|---|
| Political system                                 | Parliamentary democracy under the constitutional monarchy belonging to the Commonwealth of Nations  |
| Election system                                  | Free and regular elections are held.<br>The monarch is hereditary. The governor-general is appointed by the monarch based on the advice of the prime minister. After the legislative elections, the head of a majority party or coalition government is appointed prime minister by the governor.   |
| Legislative system                               | Bicameral parliament  |
| Most recent / next legislative election          | Senate: May 24, 2017 (next appointment date scheduled for November 2022)<br>House of Representatives: September 16, 2021 (next election scheduled for September 2026)   |
| Judicial system<br>Appointment and term of judge | The Chief of the Court of Appeals and the Chief of the Supreme Court are appointed by the Governor-general based on the advice of the Prime Minister after consultation between the Prime Minister and the leader of the opposition party. Other Appeal Court judges and Supreme Court judges are appointed by the Governor-general on the recommendation of the five-member Judicial Justice Committee led by the Supreme Court Chief. |
| Political stability                              | Stable for the past 10 years  |
| “Worldwide Governance Indicators”                | Overall, above the regional average. However, in recent years, the level of "government effectiveness" and the level of "control of corruption" have deteriorated sharply.  |

|  |      | Indicator   | Country                     | Year | Percentile Rank (0 to 100) |
|--|------|---|-----------------------------|------|----------------------------|
|  |      | Voice and Accountability                              | * Latin America & Caribbean | 2010 | 60                         |
|  | 2019 |   |                             | 60   |                            |
|  | 2020 |   |                             | 60   |                            |
|  |      | Bahamas, The  |                             | 2010 | 80                         |
|  | 2019 |   |                             | 80   |                            |
|  | 2020 |   |                             | 80   |                            |
|  |      | Political Stability and Absence of Violence/Terrorism | * Latin America & Caribbean | 2010 | 50                         |
|  | 2019 |   |                             | 50   |                            |
|  | 2020 |   |                             | 50   |                            |
|  |      | Bahamas, The  |                             | 2010 | 80                         |
|  | 2019 |   |                             | 80   |                            |
|  | 2020 |   |                             | 80   |                            |
|  |      | Government Effectiveness                              | * Latin America & Caribbean | 2010 | 60                         |
|  | 2019 |   |                             | 60   |                            |
|  | 2020 |   |                             | 60   |                            |
|  |      | Bahamas, The  |                             | 2010 | 80                         |
|  | 2019 |   |                             | 80   |                            |
|  | 2020 |   |                             | 80   |                            |
|  |      | Regulatory Quality                                    | * Latin America & Caribbean | 2010 | 60                         |
|  | 2019 |   |                             | 60   |                            |
|  | 2020 |   |                             | 60   |                            |
|  |      | Bahamas, The  |                             | 2010 | 80                         |
|  | 2019 |   |                             | 80   |                            |
|  | 2020 |   |                             | 80   |                            |
|  |      | Rule of Law   | * Latin America & Caribbean | 2010 | 60                         |
|  | 2019 |   |                             | 60   |                            |
|  | 2020 |   |                             | 60   |                            |
|  |      | Bahamas, The  |                             | 2010 | 80                         |
|  | 2019 |   |                             | 80   |                            |
|  | 2020 |   |                             | 80   |                            |
|  |      | Control of Corruption                                 | * Latin America & Caribbean | 2010 | 60                         |
|  | 2019 |   |                             | 60   |                            |
|  | 2020 |   |                             | 60   |                            |
|  |      | Bahamas, The  |                             | 2010 | 80                         |
|  | 2019 |   |                             | 80   |                            |
|  | 2020 |   |                             | 80   |                            |

|                                   |  |
|-----------------------------------|--|
| Global freedom status             | 91/100 points (citizen rights: 38/40 points, political rights: 38/40 points)<br>Classified as "free country" (Freedom House 2021)  |
| Corruption Perception Index (CPI) | 30/180 (2nd in Central America / Caribbean), score 63/100 (Transparency International 2020).<br>Looking at WGI, it ranks second among the 23 countries in the Caribbean region of Central America in terms of "controlling corruption."  |
| E-government development index    | It is ahead of the world average and the regional average. The national ID is issued by the Ministry of Justice, but as of 2018, the card has not been digitalized.  |
| Rule of law                       | Two indicators related to the "rule of law" (the "rule of law" for the activities of private companies and the "rule of law" for the development of the judicial system and human rights compliance) have deteriorated significantly in the last 20 years. However, it is above the regional average.  |
| Citizen Security                  | The homicide rate is always higher than the Caribbean average. Mainly due to the gang struggle. The homicide rate was 32 / 100,000 (the average of 14 / 100,000 in the Caribbean region and 6 / 100,000 in the world in the same year) (UNODC 2021), which is the second highest after Jamaica among the 23 countries surveyed. Security is a major issue. |

Source: Survey Team

### 2.3.7 DX / Innovation

|   |  |   |
|---|--|---|
| Basic indicators and statistics   | E-Government Ranking <sup>1)</sup> : 81st                        | Radar chart of e-government ranking<br> |
|   | Mobile connection index <sup>2)</sup> : 64.9                     |   |
|   | Network Infrastructure Index: 44.1                               |   |
|   | Internet user rate 77.3  |   |
|   | Mobile connection rate 136.0                                     |   |
|   | Fixed broadband rate 24.3  |   |
|   | Rate of increase in the number of Internet users 0.3 (2021/2020) |   |
| Communication network   |  |   |
| The Bahamas' Communication Infrastructure Index (2020) <sup>3)</sup> is 0.67, which exceeds the global standard (0.60) and is highly developed. According to the 2014 URCA (Public Utility Regulatory Competition Authority) report <sup>4)</sup> , the sector's revenue is 458 USD million, a contribution of 5.5% GDP (2014).<br>The current major telecommunications company is still the Bahama Telecommunications Company (BTC) <sup>5)</sup> , co-owned by the government and Cable & Wireless Communications (CWC), a leading provider of Internet, landline and mobile services. ... At the time of the BTC state-owned enterprise, the telecommunications sector was monopolized, but in 2011, |  |   |



the government began liberalizing the telecommunications sector<sup>6)</sup>, expanding the possibilities of investment in the private sector, and BTC's More than 50% of its holdings are sold to CWC<sup>7)</sup>.

In the mobile phone / mobile broadband market, services are provided by BTC and Be Aliv Limited (Aliv)<sup>8)</sup>, which entered the market in 2016. Regarding 4G / LTE, BTC started the service in March 2015 and Aliv started the service in November 2016<sup>9)</sup>,<sup>10)</sup>. In 2019, Aliv introduced Clear Sky Technology<sup>11)</sup> to improve network performance and UX (user experience) by maximizing network capacity through real-time adjustments, and currently has a 40% share. Acquired<sup>10)</sup>. The mobile penetration rate<sup>12)</sup>, which was 120.7% in 2010, has been declining since then, and it was a stagnant sector such as below the Latin American and Caribbean averages for a while, but due to this market competition, in 2019 It has recovered to 109.2%<sup>12)</sup>.

For fixed voice services and fixed broadband services, BTC and Cable Bahamas Limited (CBL)<sup>13)</sup> are the main service providers (ISPs) and are in a semi-oligopoly state, but there are several small ISPs. The penetration rate of fixed broadband is higher than the Latin American and Caribbean averages, but since 2012, it has been in the 21-22% range and growth has stagnated<sup>14)</sup>.

#### National Strategy for Digital Transformation

The national development plan "Vision 2040"<sup>15)</sup>, which was created in collaboration with the Inter-American Development Bank (IDB) as a future development roadmap for Bahama, includes a "smart nation" plan, which is information and communication technology (ICT). ) It aims to improve the quality of life of citizens through its use, foster more efficient and competitive companies in the region, and provide sustainable, widespread and good quality public services. The six aspects of economy, governance, life, people, environment and mobility included in the definition of a smart nation correspond to the four pillars (economy, governance, environment and human capital) defined in Vision 2040. There is.

As an item related to ICT, we aim to build a modern infrastructure in the environmental program, and create a strong ICT infrastructure (network, system, etc.) to promote the uneven use of ICT. The Human Capital Program aims to build a modern, sustainable and universally available healthcare system, streamlining and integrating healthcare governance, management, and service delivery, including the use of Information and Communication Technology (ICT). Will be promoted. The economic program will also promote investment in the ICT industry and services, increasing the productivity of all industries, governments and government sectors. Grand Bahama (the northernmost island) has the infrastructure to host security services, including data centers and cybersecurity, to attract international call centers and business process outsourcing companies<sup>16)</sup>.

#### Characteristic efforts

In November 2019, the DX Division (DTD)<sup>17)</sup> was officially launched within the government. This is an initiative<sup>18)</sup> that transfers and makes all major government services accessible to online platforms, thereby creating more effective and seamless processes for business, in collaboration with the Inter-American Development Bank (IDB) (\$ 30 million). It is a project that has been financed. Citizens will be able to access more than 200 government services 24x7x365 using their e-ID, providing fast and accurate response services<sup>18)</sup>. With the introduction of the E-passport, it will be possible to update from the Ministry of Foreign Affairs website<sup>18)</sup>. Furthermore, it is planned to introduce an electronic cabinet management system to the Cabinet Office<sup>18)</sup>. The electronic cabinet simplifies, rationalizes, and digitizes various operations operated by the Cabinet Office under the highest security functions, supports mobile accessibility of ministers, administrative vice-ministers, etc., and improves government services.

#### source

1. E-Gov-Index: a composite indicator that consists of three indexes (Online Service Index, Telecommunication Infrastructure Index and Human Capital Index), which are equally weighted. It ranges from 0 to 1, with 1 being the most developed.
2. Mobile Connectivity Index: an input index developed by GSMA to measure the performance against the four key enablers of mobile internet adoption – infrastructure, affordability, consumer readiness and content. (<https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2016/06/Mobile-Connectivity-Launch-Report.pdf>)
3. Telecommunication Infrastructure Index  
<https://publicadministration.un.org/egovkb/en-us/Data/Country-Information/id/12-Bahamas>
4. 2021 Annual Report 2020 AND 2021 Annual Plan  
<https://www.urcabahamas.bs/wp-content/uploads/2021/05/2020-Annual-Report-and-2021-Annual-Plan-.pdf>
5. BTC COMPANY HISTORY TIMELINE  
<https://www.zippia.com/btc-careers-195483/history/>
6. Approves privatization of Bahamas Telecommunications Co (BTC)  
<https://investmentpolicy.unctad.org/investment-policy-monitor/measure/106/approves-privatization-of-bahamas-telecommunications-co-btc->
7. CWC signs BTC purchase paperwork  
<https://www.commsupdate.com/articles/2011/02/09/cwc-signs-btc-purchase-paperwork/>
8. <https://www.bealiv.com/about-us/>
9. BTC 4G rollout nears completion  
<https://www.commsupdate.com/articles/2015/02/10/btc-4g-rollout-nears-completion/>
10. Stayin ALIV: Bahamian operator optimises network with ClearSky  
<https://www.commsupdate.com/articles/2019/06/14/stayin-aliv-bahamian-operator-optimises-network-with-clearsky/>
11. About Clear Sky  
<http://www.csky.com/about-clearsky/>
12. Mobile cellular subscriptions (per 100 people)-Bahamas, The, Latin America & Caribbean  
<https://data.worldbank.org/indicator/IT.CEL.SETS.P2?locations=BS-ZJ>
13. <https://www.rev.bs/about/>
14. Fixed broadband subscriptions (per 100 people) --Bahamas, The, Latin America & Caribbea  
<https://data.worldbank.org/indicator/IT.NET.BBND.P2?locations=BS-ZJ>
15. Vision 2040, National Development Plan of the Bahamas  
<http://observatorioplanificacion.cepal.org/sites/default/files/plan/files/Plan%20de%20desarrollo%202040.pdf>
16. Digital Economy & E-Commerce  
<https://www.trade.gov/country-commercial-guides/bahamas-digital-economy-e-commerce>
17. Department of Transformation and Digitization  
[www.govnet.bs/wps/portal/public/home](http://www.govnet.bs/wps/portal/public/home)
18. DIGITIZATION INITIATIVE  
<https://www.opmgb.com/digitization-initiative/>



### 2.3.8 Infrastructure and Energy

| Transport                                 |  |
|---|--|
| Overview                                  | Inland transportation is mainly by car.<br>The main public transportation is buses and taxis. There are several domestic air routes between the islands.                 |
| Leadership governance                     | Ministry of Transport and Local Government<br>Road Traffic Department (RTD)  |
| Major development partners                | IADB   |
| Energy and electricity                    |  |
| Overview                                  | 51% of energy is consumed in the commercial sector.<br>Almost all of the supply of both primary and electricity energy depends on imported fossil fuels and natural gas. |
| Carbon neutral national plan              | Bahamas National Energy Policy 2013-2033<br>Renewable energy goals in the energy mix: 30% by 2033  |
| Leadership governance and utility company | Ministry of the Environment and Natural Resources<br>Bahamas Electricity Corporation (BEC)   |
| Major development partners                | UNDP / IADB  |

Source: JICA Study Team with reference to various websites of the government organization and international organization (WB / IEA / IRENA / US DOE).

### 2.3.9 Tourism

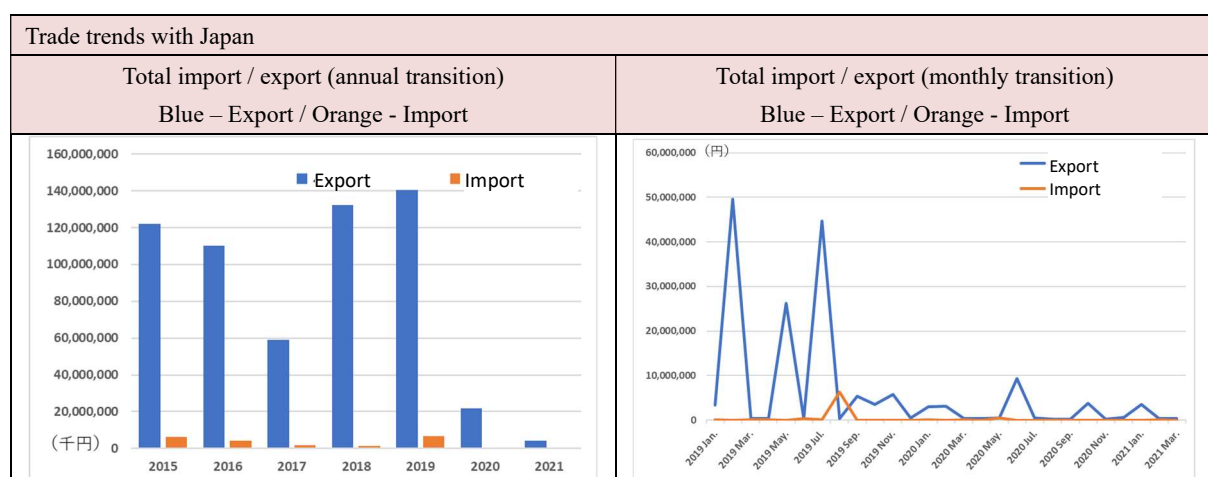
The tourism sector of the Bahamas has the highest share of GDP among the 23 countries surveyed

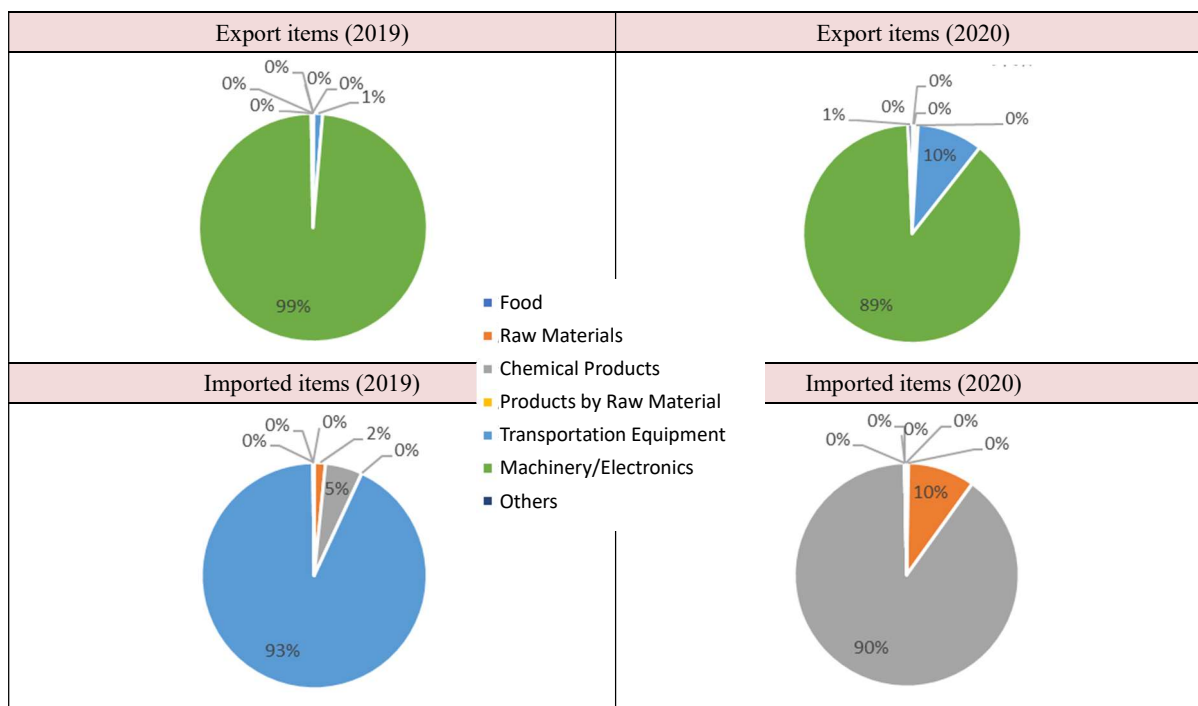
|  |  |  |
|--|--|--|
| Number of international tourist arrivals (2019)              |  | 1,804 thousand   |
| International Tourism Receipts (2019)                        |  | USD 4,126 million  |
| Tourism Competitiveness Ranking (2019)                       |  | N / A  |
| Tourism Dependency Index (2019)                              |  | 54.5 (6th out of 166 countries)  |
| Government of Japan policy                                   | Number of JICA projects in the last 10 years   | none   |
|  | References to the Country Assistance Policy  | none   |
|  | Interest in pilot projects   | N / A  |
| Tourism industry vulnerability                               | Contribution of Travel & Tourism to GDP (2019)   | 43.3% (1st out of 23 countries)  |
|  | Contribution of Travel & Tourism to employment (2019)  | 52.7% (4th out of 23 countries)  |
|  | Ratio of international spending (2019)   | 82% (10th out of 23 countries)   |
|  | Top 3 countries of origin of visitors (2019)   | USA (81.55%)<br>Canada (7.44%)<br>UK (2.04%)   |
| Importance of tourism  | Ratio of the budget amount of tourism-related ministries to the national budget amount (2019)            | 4.6% (1st out of 16 countries)<br>National budget: BSD 1,814,028,016<br>Budget for tourism-related ministries: BSD 84,338,661  |
|  | Whether or not it is mentioned as a priority sector in the National Economic and Social Development Plan | Yes<br>Plan name: The National Development Plan of the Bahamas Vision 2040<br>Reference example: Goal 14a: Tourism Economy (p. 386) in Goal 14: Diversified Economy  |
|  | Existence of effective national tourism policies / strategies / plans                                    | Yes (A National Tourism Development Strategy)  |
| Impact of COVID-19   | Changes in the contribution of Travel & Tourism to GDP (2019 → 2020)                                     | -68.0% (3rd out of 23 countries)   |
|  | Changes in the contribution of Travel & Tourism to employment (2019 → 2020)                              | -30.2% (5th out of 23 countries)   |
| Number of government support measures for the tourism sector |  | 22 (Fiscal policy: 3, Monetary policy: 5, Employment and skills: 5, Market information: 1, Public-private partnership: 1, Tourism resumption: 1, Health and safety protocol: 1, Domestic travel: 1, Others: 4) |

Source: Survey Team

### 2.3.10 Public-private partnership

|  | item   | Contents    |
|--|--|-------------|
| No. of JICA Public-Private Partnership Projects (After 2012)                 | Cooperation preparatory survey (overseas investment and financing) (former PPP infrastructure project)           | 0 cases     |
|  | Overseas investment and loan   | 0 cases     |
|  | SME Partnership Promotion Survey (support for Small-sized Enterprise)  | 0 cases     |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for small- and medium- sized enterprise) | 0 cases     |
|  | SDGs Business Verification Survey with Private Sector (support for small- and medium- sized enterprise)          | 0 cases     |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for large enterprise)                    | 0 cases     |
|  | SDGs Business Verification Survey with Private Sector (support for large enterprise)                             | 0 cases     |
| Total number of Japanese private companies entering the market (2019 survey) | Total number of business locations   | 2 companies |
|  | Overseas branches of Japanese companies,   | 0 companies |
|  | Local corporations wholly owned by Japanese companies and their branches   | 0 companies |
|  | Branch offices wholly owned by Japanese companies and their branches   | 0 companies |
|  | joint ventures (local corporations in which Japanese companies have a direct or indirect stake of 10% or more)   | 0 companies |
|  | joint ventures (Branch offices in which Japanese companies have a direct or indirect stake of 10% or more)       | 0 companies |
|  | companies established overseas by Japanese nationals (in which Japanese nationals have a stake of 10% or more)   | 2 companies |
|  | Unknown classification   | 0 companies |
| Number of Japanese residents (2020 survey)                                   | Total  | 26 people   |
|  | Long-term residents  | 19 people   |
|  | Permanent resident   | 7 people    |
| Business Environment   | Doing Business 2020 Rank   | 119th       |
| PPP Project  | Existence of PPP law scheme  | ○           |
|  | PPP project with Japanese companies  | 0 cases     |





### Gathering information about the PPP system

| Nº       | Task Item   | Inquiries/comments/status<br>Title of submitted file   | Source/URL  |
|----------|---|--|---|
| <b>1</b> | <b>PRIORITY 4_ PPP Sector</b>   |  |   |
| 1.1      | PPP Projects in selective countries<br>PPP rules and regulations in Central America and Caribbean Countries |  | All below can be useful   |
| A        | PPP laws and Regulations<br>if there is any, when, and how  | Public-Private Partnerships (PPP) Policy   | <a href="https://www.bahamas.gov.bs/wps/wcm/connect/5a74940c-6125-406c-8140-5584eaf525d4/Public+Private+Partnerships+Policy+Sept+2018.pdf?MOD=AJPERES">https://www.bahamas.gov.bs/wps/wcm/connect/5a74940c-6125-406c-8140-5584eaf525d4/Public+Private+Partnerships+Policy+Sept+2018.pdf?MOD=AJPERES</a> |
| B        | PPP Unit Organization<br>if there is any, how structured  | The PPP programme will be overseen by the PPP Steering Committee. A team in Ministry of Finance will be designated as a PPP Operational Unit, to act as secretariat to that Steering Committee, and supervise the day-to-day management of the PPP programme. Each PPP initiative will be the responsibility of the sponsoring Ministry or Government Agency, and will be implemented by a multi-agency Project Team. Proposed PPPs will be reviewed and approved by Cabinet, at key stages in the development and procurement processes. (Public-Private Partnerships (PPP) Policy - point 5 - page 14) | <a href="https://www.bahamas.gov.bs/wps/wcm/connect/5a74940c-6125-406c-8140-5584eaf525d4/Public+Private+Partnerships+Policy+Sept+2018.pdf?MOD=AJPERES">https://www.bahamas.gov.bs/wps/wcm/connect/5a74940c-6125-406c-8140-5584eaf525d4/Public+Private+Partnerships+Policy+Sept+2018.pdf?MOD=AJPERES</a> |
| C        | PPP sectors<br>in what sectors are the PPPs allowed   | Priority sectors.<br>i. Electricity generation and distribution, including the development of Renewable Energy (RE) sources, in the Family Islands;<br>ii. Ports;<br>iii. Airports;<br>iv. Roads and bridges;<br>v. Information and Communications Technology (ICT);<br>vi. Urban renewal; and<br>vii. Government buildings and facilities.<br>(Public-Private Partnerships (PPP) Policy - point 3.2 - page 9)   | <a href="https://www.bahamas.gov.bs/wps/wcm/connect/5a74940c-6125-406c-8140-5584eaf525d4/Public+Private+Partnerships+Policy+Sept+2018.pdf?MOD=AJPERES">https://www.bahamas.gov.bs/wps/wcm/connect/5a74940c-6125-406c-8140-5584eaf525d4/Public+Private+Partnerships+Policy+Sept+2018.pdf?MOD=AJPERES</a> |
| D        | Proposal Types (Solicited or Unsolicited)<br>unsolicited  | Both are allowed<br>Propuesta no solicitada (Public-Private Partnerships (PPP) Policy - point 6.5 - page 29)   | <a href="https://www.bahamas.gov.bs/wps/wcm/connect/5a74940c-6125-406c-8140-5584eaf525d4/Public+Private+Partnerships+Policy+Sept+2018.pdf?MOD=AJPERES">https://www.bahamas.gov.bs/wps/wcm/connect/5a74940c-6125-406c-8140-5584eaf525d4/Public+Private+Partnerships+Policy+Sept+2018.pdf?MOD=AJPERES</a> |
| E        | PPP Forms<br>BOT, BTO, DB, , , what form are allowed  | Types<br>-DBFOM<br>-DBFM<br>-BOT<br>-PERNO<br>-BOO<br>-OMM<br>(Public-Private Partnerships (PPP) Policy - Annex - page 32)   | <a href="https://www.bahamas.gov.bs/wps/wcm/connect/5a74940c-6125-406c-8140-5584eaf525d4/Public+Private+Partnerships+Policy+Sept+2018.pdf?MOD=AJPERES">https://www.bahamas.gov.bs/wps/wcm/connect/5a74940c-6125-406c-8140-5584eaf525d4/Public+Private+Partnerships+Policy+Sept+2018.pdf?MOD=AJPERES</a> |
| F        | PPP types<br>Availability payment, service purchase   | -  |   |
| G        | PPP Project Trends<br>how much PPP projects in the last 10 years  | 1<br>- Proyecto de desarrollo portuario Arawak (2017)  | <a href="http://www.nassaucontainerport.com/about_apd.cfm">http://www.nassaucontainerport.com/about_apd.cfm</a>   |
| H        | Participation of Japanese firms in PPP Projects<br>if any (check news source)                               | -  |   |
| I        | Any notable points for each country<br>if any   |  |   |

Source: Survey Team

### 3. Barbados

#### 3.1 Country overview

##### 3.1.1 Basic information

Barbados (English: Barbados) is a constitutional monarchy located at the eastern end of the Lesser Antilles in the Caribbean Sea and the West Indies. The capital is Bridgetown. It is an island country made entirely of coral reefs, with Saint Lucia to the northwest, St. Vincent and the Grenadines to the west, and Grenada and Trinidad and Tobago to the southwest, about 200 km across the sea. It is the country with the most established parliamentary democracy in Latin America and the Caribbean, and is the highest in the region at 42nd place (2010) in the Human Development Index by the United Nations. The average life expectancy is 77.2 years (male 74.2 years old, female 79.8 years old, 2010), which is the 43rd place in the world. It is a country of the Commonwealth of Nations and is a constitutional monarch headed by the British monarch, but it was announced that it would shift to a republic by November 2021. Most of the island is flat, but Mt. Hillaby (314m) on the hill rises in the center of the island. Bridgetown There is a huge bridge in the city, which is a symbol of the town. According to the IMF, Barbados had a per capita GDP of \$ 14,326 in 2010, ranking 42nd in the world and one of the wealthiest countries in the Caribbean. Since the British colonial era, Barbados has been an economically prosperous country due to its stable politics and high education standards. Barbados has historically had a deep relationship with Britain and maintained good relations even after independence, so that it was called "Little England", so it is more culturally influenced by Britain than other Caribbean countries. Historically, the Barbados economy has been supported by sugarcane cultivation. However, from the latter half of the 1970s, the tourism industry developed and became a pillar supporting the Barbados economy. Unlike other Caribbean countries, it is mainly composed of coral reefs rather than volcanic islands. It is also the country of origin of grapefruit.<sup>5</sup>

##### 3.1.2 General circumstances

|             |  |                 |  |
|-------------|--|-----------------|--|
| 1 area      | 430 square kilometers (almost the same as Tanegashima) | 2 Population    | 286,000 (2018 World Bank)  |
| 3 Capital   | Bridgetown   | 4 ethnic groups | African (92.4%), mixed race (3.1%), Caucasian (2.7%), East Indian (1.3%), etc. |
| 5 languages | English (official language)                            | 6 religion      | Christianity (Church of England, Protestant, Catholic), etc.                   |

Source: Ministry of Foreign Affairs HP Barbados Basic Data

##### 3.1.3 Economic overview

|                          |  |                              |   |
|--------------------------|--|------------------------------|---|
| 1 Major industry         | Tourism, light industry, agriculture (sugar)   | 2 GNI<br>3 GNI / person      | US \$ 4,417 million (World Bank 2018)<br>US \$ 37,350 (2019, WDI) |
| 4 Economic growth rate   | -0.49% (2018 World Bank)   | 5 Unemployment rate          | 10.33% (2019) (ILO)   |
| 6 Price increase rate    | 3.68% (2018), 1.92% (2019 estimate) (IMF)  |                              |   |
| 7 Total trade amount     | Exports: US \$ 445 million (2018)<br>Imports: US \$ 1,585 million (2018) (WTO)   |                              |   |
| 8 Major trade items      | Export: Fuel, alcoholic beverages (distilled liquor), chemicals, jewelry parts<br>Imports: Fuel, transportation machinery, jewelry parts, chemicals, sweetened beverages, alcoholic beverages            |                              |   |
| 9 Major trading partners | Exports: USA, Trinidad and Tobago, Guyana, EU, Jamaica (2018, WTO)<br>Imports: USA, Trinidad and Tobago, EU, China, Japan (2018, WTO)  |                              |   |
| 10 currencies            | Barbados dollar (BD. \$)   | 11 Foreign currency reserves | na  |
| 12 National budget       | USD1,590,406,459 (2019)  | 13 External debt balance     | na  |
| 14 Economic overview     | Economic structure centered on the tourism industry. In the 1960s and 1970s, the growth rate was maintained at a high rate mainly due to the growth of the tourism and manufacturing industries, but the |                              |   |

<sup>5</sup>It was once one of the few places where Concorde flew from London.

|  |   |
|--|---|
|  | <p>growth slowed down in the 1980s and caused a serious economic stagnation in the 1990s. In response to this, the government implemented structural adjustment measures such as privatization and reduction of civil servants, and the unemployment rate exceeded 20% in 1992, but since 1993, tourism, the recovery of the manufacturing industry, and the construction industry. The positive growth was maintained until 2000, mainly due to the growth of. However, the GDP growth rate in 2001 was negative due to the damage to the tourism industry caused by the terrorist attacks on the United States. After that, the government implemented policies such as domestic manufacturing, agricultural protection and tourism, and revitalization of the financial sector, and after 2002, it turned to positive growth again. In January 2006, the implementation of the CARICOM Single Market (CSM) was started. Since 2008, tourism revenue has declined due to the global economic recession, and the sugar industry has fallen, worsening the economic recession. Rating agency Standard &amp; Poor's downgraded Barbados' long-term foreign currency sovereign debt rating and domestic currency sovereign debt rating from B to B- in September 2016, but in June 2018 a large amount of non-payment of external debt. In August of the same year, it was downgraded to SD (selective default). The new administration of Motley announced the economic reconstruction and reform plan of Barbados on August 30, the same year, and also continued negotiations with the IMF to conclude an extended credit grant (EFF) on September 7, the same year at the administrative level. I agreed. The agreement was approved by the IMF Council on October 1, the same year, and Barbados will work on economic reconstruction and reforms for the next four years with the cooperation of the IMF.</p> |
|--|---|

Source: Ministry of Foreign Affairs HP Barbados Basic Data

### 3.1.4 Country-specific development cooperation policy

#### (1) Government of Japan Development Cooperation Policy by Country

**Table 3-1 Overview of Japan's ODA to Barbados**

|                                      |  |
|--------------------------------------|--|
| 1. 1. Overview                       | <p>Japan's economic cooperation with Barbados began with the acceptance of trainees in 1977, the dispatch of experts in 1989, and the Grant-in-Aid for Grassroots Human Security in 2013. Japan is currently implementing cooperation centered on technical cooperation such as accepting trainees in the field of disaster prevention and the environment.</p>  |
| 2. 2. Aim of development cooperation | <p>There are many island nations in the Caribbean region where the members of the Caribbean Community (Calicom) including Barbados are located, and natural disasters such as hurricanes, earthquakes, and tsunamis occur frequently, and the sustainable use of marine biological resources is promoted. It has something in common with Japan in terms of promotion. In addition to being vulnerable to climate change and natural disasters, Calicom member countries are based on industries that have a small population and economy and are susceptible to external factors such as agriculture, fisheries, and tourism. All 14 countries are included in the list of small island developing states published by the United Nations Secretariat. In order to overcome the vulnerabilities peculiar to small island developing states in the Calicom countries, it is necessary to cooperate by utilizing Japan's technology and knowledge in addition to deepening bilateral relations and socio-economics of each country. It is important from the viewpoint of financial stability and sustainable growth of the entire region.</p>  |
| 3. 3. Basic policy                   | <p>In the Development Cooperation Charter, even if the per capita income is at a certain level, for countries with special vulnerabilities such as small island developing states, necessary cooperation will be provided according to the actual development needs and burden capacity of each country. For the Caribbean Community (Calicom) member countries, the first is based on the Japan-Calicom Joint Ministerial Statement adopted at the 4th Japan-Calicom Foreign Ministers' Meeting held in November 2014. In order to "cooperate for sustainable development including overcoming vulnerabilities peculiar to small island developing states", we will develop cooperation that makes use of Japan's technology and knowledge. In accordance with this policy, Barbados, which has graduated from the OECD / DAC list of recipient countries / regions, will also be provided with the necessary cooperation based on the results of the survey on the need for assistance. At that time, we will support the overcoming of the vulnerabilities peculiar to small island developing states by supporting environmentally friendly sustainable social development and disaster prevention efforts. We also reaffirmed that we will cooperate in accordance with this policy at the 5th Japan-Calicom Foreign Ministers' Meeting held in September 2016.</p> |
| 4. Priority areas                    | <p>Disaster prevention / environment: Small based on the results of surveys on the need for support in fields such as frequent hurricanes, strengthening capacity to respond to natural disasters such as floods, promotion of energy conservation and conversion to renewable energy, and waste management. Develop the support needed to overcome the vulnerabilities peculiar to small island developing states. Also pay attention to sharing knowledge with other Calicom member countries.</p>   |

Source: Ministry of Foreign Affairs HP Barbados Country Data Collection 2017

**Table 3-2 National Development Cooperation Policy for Barbados (September 2016)**

| 3. 3. Priority field (medium goal)    |  |
|---------------------------------------|--|
| (1) Disaster prevention / environment | We are frequently hit by natural disasters such as hurricanes and floods, and we will provide support in the fields of disaster prevention and climate change countermeasures, which are urgent issues. Cooperate to promote the introduction of renewable energy and energy conservation.           |
| (3) Others                            | Waste management is especially important for small island developing states, whose main industry is tourism, and although private-sector-led recycling is being promoted in Barbados, strengthening the capacity of the administrative department in charge of waste management remains an issue. .. |

Source: Survey Team

**(2) Survey on COVID-19 by development partners**

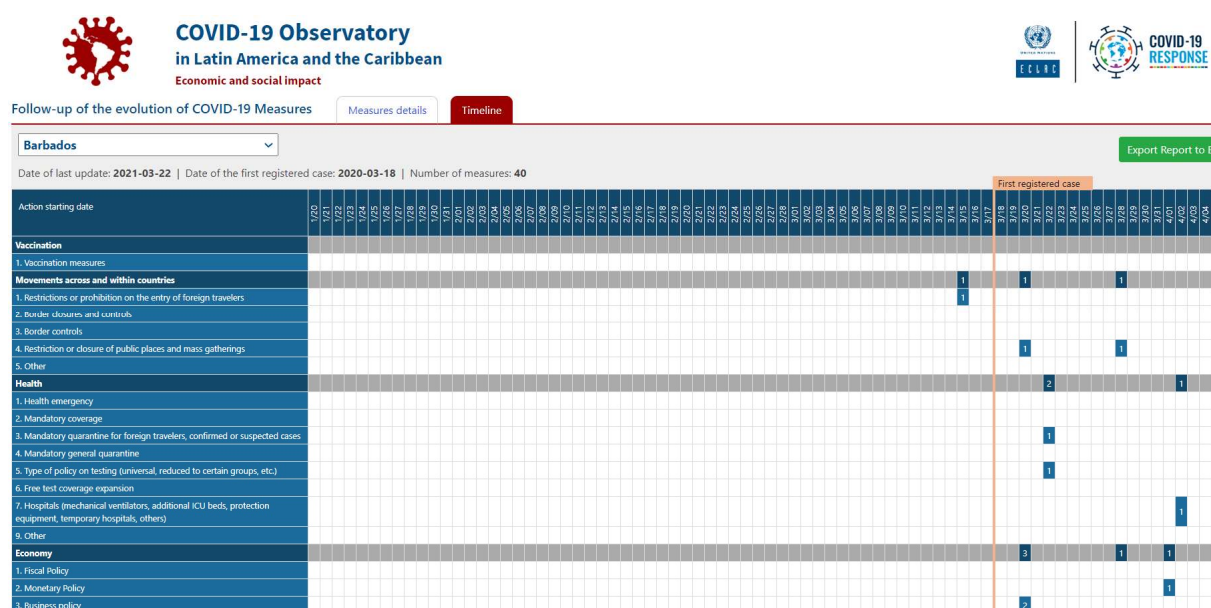
We extracted sector names and specific quantitative figures that have a large impact on the country-specific analysis described in various reports of development partners. Reports from the World Bank, OECD, BCIE, SICA, and the Ministry of Economy, Trade and Industry of Japan suggest the importance of introducing digitalization and innovation (Fintech, Aggrotech, Autotech, etc.), and incorporate the survey results of these development partners. I arranged it accordingly.

World Bank: "Growth and Revitalization" 2021 Semi-Annual Economic Report (March 2021)

- ✓ OECD: COVID-19 in LAC, Regional socio-economic implications and policy priorities (December 2020)
- ✓ BCIE: Impacto Económico del COVID-19 (April 2020)
- ✓ SICA: Estimación del Impacto Económico del COVID-19 en Centroamérica y República Dominicana (April 2020)
- ✓ Ministry of Economy, Trade and Industry of Japan: "Economic and Industrial Policy Based on the Impact of the New Corona Virus" (June 2020), Accelerating Digitization and Onlineization, Gig Economy, Innovation in the Transition to a New Everyday Life 1) Medical care / health, 2) Digital: Infrastructure development premised on the arrival of a digital society, 3) Green: Response to climate change problems, Energy security, 4) Emphasizes resilience.

**3.1.5 Policies for COVID-19 measures taken by governments of each country**

Various policies for COVID-19 taken by the government are described on the ECLAC homepage "COVID-19 Observatory" by country, time series, and field, and can be analyzed.



Source: <https://cepalstat-prod.cepal.org/forms/covid-countrysheet/index.html?table=2&country=BRB>



In this survey, the 24 policies in Barbados listed on this website were classified by sector as much as possible.

**1) Infection spread and alleviation of aggravation and death**

No material was available.

**2) Support for affected industries and people**

**Table 3-3 Support for affected industries and people (Barbados)**

| Various government policies (COVID-19 Ovservatory for LAC) |    |  |  |
|--|----|--|--|
| Socioeconomic policy                                       | 6  |  |  |
| Health care & nutrition                                    | 2  |  |  |
| Education  | 2  |  |  |
| Agriculture & rural development                            | 0  |  |  |
| Private sector   | 7  |  |  |
| Environment & disaster prevention                          | 0  |  |  |
| Governance and social security                             | 3  |  |  |
| DX and innovation  | 0  |  |  |
| Infrastructure & energy                                    | 0  |  |  |
| Tourism  | 0  |  |  |
| PPP  | 0  |  |  |
| Others (b)   | 4  |  |  |
| total  | 24 |  |  |

Source: Survey Team

**3) Arrangement of various policies for COVID-19 taken by the government**

COVID-19 Observatory for Latin America and Caribbean (ECLAC) organized by governments

**Table 3-4 Government-directed COVID-19 Policy Categories (Barbados)**

**Follow-up of the evolution of COVID-19 Measures**

| <b>Vaccination</b>  | <b>Economy</b>   | <b>Social protection</b>  |
|---|--|---|
| 1. Vaccination measures   | 1. Fiscal Policy   | 1. Cash transfers (new transfers, increase in existing transfers, expansion of cash transfers to new recipients, early disbursement of transfers) |
| <b>Movements across and within countries</b>  | 2. Monetary Policy   | 2. Food transfers / In-kind transfers   |
| 1. Restrictions or prohibition on the entry of foreign travelers  | 3. Business policy   | 3. Guarantee of basic services  |
| 2. Border closures and controls   | 4. Restriction of economic activity (including shops and shopping centers)                             | <b>Education / schools</b>  |
| 3. Border controls  | 5. Price and quantity controls   | 1. Suspension of classes  |
| 4. Restriction or closure of public places and mass gatherings  | 6. Economic Stimulus (includes aggregate value of fiscal measures and separately of credit guarantees) | 2. Provision of tools for distance learning (online platforms, TV, radio, distance-learning materials)  |
| 5. Other  | 7. Regulation of the personal hygiene and cleaning products market                                     | 3. Maintenance of school feeding programme (indicating under which modalities)  |
| <b>Health</b>   | 8. Debt relief and suspension of credit payments (individuals, microentrepreneurs)                     | <b>Gender</b>   |
| 1. Health emergency   | 9. Other   | 1. Gender-based violence against women  |
| 2. Mandatory coverage   | <b>Labor</b>   | 2. Care economy   |
| 3. Mandatory quarantine for foreign travelers, confirmed or suspected cases                                   | 1. Labor Protection  | 3. Employment and income generation   |
| 4. Mandatory general quarantine   | 2. Elective work leave   | 4. Benefits, transfers and other social protection measures   |
| 5. Type of policy on testing (universal, reduced to certain groups, etc.)                                     | 3. Reduction of working hours  | 5. Women's participation in the digital era   |
| 6. Free test coverage expansion   | 4. Prohibition of dismissal from work  | 6. Other  |
| 7. Hospitals (mechanical ventilators, additional ICU beds, protection equipment, temporary hospitals, others) | 5. Other   |   |

Source: Survey Team



### 3.2 Macroeconomic analysis and selection of priority countries

#### 3.2.1 Macroeconomic analysis

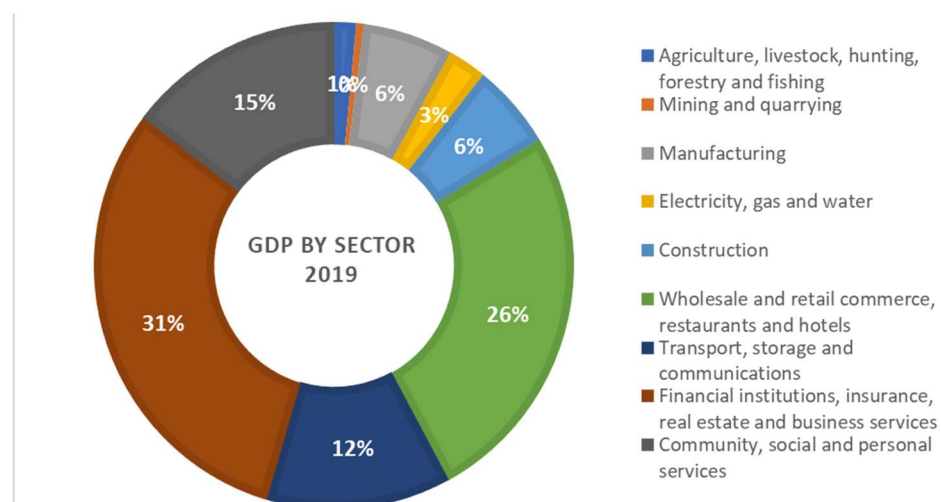
##### (1) Industrial composition

**Table 3-5 Industrial Composition (Barbados)**

Table: GDP by sector (En millones de dólares de Barbados a precios constantes de 2010)

|  | 2011  | 2012  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019a/ | 2020 b/ |
|--|-------|-------|-------|-------|-------|-------|-------|-------|--------|---------|
| Agriculture, livestock, hunting, forestry and fishing                | 109   | 110   | 113   | 110   | 110   | 109   | 105   | 121   | ...    | ...     |
| Mining and quarrying   | 18    | 16    | 21    | 29    | 37    | 32    | 41    | 42    | ...    | ...     |
| Manufacturing  | 525   | 504   | 490   | 469   | 491   | 485   | 493   | 495   | ...    | ...     |
| Electricity, gas and water   | 216   | 221   | 221   | 221   | 217   | 219   | 215   | 214   | ...    | ...     |
| Construction   | 503   | 504   | 495   | 502   | 496   | 483   | 493   | 462   | ...    | ...     |
| Wholesale and retail commerce, restaurants and hotels                | 1,952 | 1,872 | 1,840 | 1,829 | 1,939 | 2,043 | 2,072 | 2,099 | ...    | ...     |
| Transport, storage and communications                                | 976   | 985   | 934   | 967   | 973   | 1,065 | 1,046 | 1,018 | ...    | ...     |
| Financial institutions, insurance, real estate and business services | 2,345 | 2,378 | 2,348 | 2,384 | 2,469 | 2,508 | 2,529 | 2,519 | ...    | ...     |
| Community, social and personal services                              | 1,315 | 1,334 | 1,328 | 1,257 | 1,221 | 1,202 | 1,201 | 1,188 | ...    | ...     |
| Total  | 7,959 | 7,924 | 7,789 | 7,768 | 7,953 | 8,146 | 8,194 | 8,158 | 0      | 0       |

Source: ECLAC



Source: Survey Team

## (2) Trends in major economic indicators

**Table 3-6 Trends in Major Economic Indicator (Barbados)**

Table 1 BARBADOS: MAIN ECONOMIC INDICATORS (Annual growth rates)

|  | 2011    | 2012    | 2013    | 2014     | 2015     | 2016    | 2017     | 2018    | 2019a/   | 2020 b/  |
|--|---------|---------|---------|----------|----------|---------|----------|---------|----------|----------|
| Gross domestic product (Annual growth rates c/)                                      | -0.8    | -0.1    | -1.4    | -0.2     | -2.2     | 2.3     | 0.5      | -0.6    | -0.1     | -16.0    |
| Per capita gross domestic product (Annual growth rates c/)                           | -1.2    | -0.5    | -1.7    | -0.5     | 1.9      | 2.0     | 0.3      | -0.7    | -0.2     | -16.2    |
| Gross domestic product, by sector (Annual growth rates c/)                           |         |         |         |          |          |         |          |         |          |          |
| Agriculture, livestock, hunting, forestry and fishing                                | -7.3    | 0.9     | 2.3     | -2.5     | 0.4      | -1.0    | -3.3     | 14.8    | -5.9     |          |
| Mining and quarrying   | -15.1   | -8.2    | 26.7    | 39.1     | 29.9     | -13.2   | 25.6     | 2.4     | -0.3     |          |
| Manufacturing  | -0.6    | -4.0    | -2.7    | -4.3     | 4.8      | -1.3    | 1.6      | 0.5     | -5.3     |          |
| Electricity, gas and water   | 0.5     | 2.6     | -0.1    | 0.2      | -1.8     | 0.7     | -1.9     | -0.3    | -1.1     |          |
| Construction   | -1.2    | 0.2     | -1.8    | 1.4      | -1.2     | -2.6    | 2.1      | -6.4    | -4.0     |          |
| Wholesale and retail commerce, restaurants and hotels                                | 0.6     | -4.1    | -1.7    | -0.6     | 6.0      | 5.4     | 1.4      | 1.3     | -4.0     |          |
| Transport, storage and communications  | -1.0    | 0.8     | -5.1    | 3.5      | 0.6      | 9.5     | -1.8     | -2.6    | 0.5      |          |
| Financial institutions, insurance, real estate and business services                 | -1.3    | 1.4     | -1.3    | 1.6      | 3.6      | 1.6     | 0.8      | -0.4    | ...      |          |
| Community, social and personal services  | -1.9    | 1.5     | -0.5    | -5.3     | -2.9     | -1.5    | -0.1     | -1.1    | ...      |          |
| Balance of Payments (Millions of dollars)  |         |         |         |          |          |         |          |         |          |          |
| Current account balance  | -254.2  | -411.0  | -248.2  | -432.9   | -288.6   | -205.8  | -188.6   | -201.0  | -162.0   | -323.0   |
| Goods balance  | -876.1  | -846.1  | -801.7  | -1,299.0 | -1,038.5 | -957.4  | -1,030.3 | -956.8  | -1,015.4 | -1,027.0 |
| Exports, f.o.b.  | 861.9   | 851.0   | 885.4   | 792.0    | 800.5    | 834.6   | 803.0    | 379.3   | 396.7    | 302.2    |
| Imports, f.o.b.  | 1,738.1 | 1,697.1 | 1,687.1 | 2,091.0  | 1,839.0  | 1,791.9 | 1,833.3  | 1,336.0 | 1,412.1  | 1,329.3  |
| Services trade balance   | 773.1   | 747.0   | 734.1   | 1,456.1  | 1,367.2  | 1,409.3 | 1,520.1  | ...     | ...      | ...      |
| Income balance   | -91.7   | -300.2  | -129.7  | -200.0   | -238.4   | -237.0  | -242.1   | ...     | ...      | ...      |
| Net current transfers  | -59.5   | -11.7   | -50.9   | -390.0   | -378.8   | -420.8  | -436.3   | ...     | ...      | ...      |
| Capital and financial balance (Millions of dollars)                                  |         |         |         |          |          |         |          |         |          |          |
| Net foreign direct investment d/   | 83.3    | 565.1   | -62.1   | ...      | ...      | ...     | ...      | ...     | ...      | ...      |
| Other capital movements d/   | 158.3   | -126.1  | 154.2   | 388.3    | 225.8    | 82.9    | 51.6     | ...     | ...      | ...      |
| Foreign remittance from abroad for 2019 and 2020                                     | 149.9   | 138.8   | -37.6   | 188.3    | -12.6    | -154.1  | -190.5   | ...     | ...      | ...      |
| Microfinance dispatched and the sectors that received microfinance for 2019 and 2020 |         |         |         |          |          |         |          |         |          |          |

Source: Economic Survey of Latin America and the Caribbean 2020: Main conditioning factors of fiscal and monetary policies in the post-COVID-19 era

### 3.2.2 Impact analysis and identification of key sectors

#### (1) Impact assessment results for each sector by AHP analytic hierarchy process based on economic indicators

**Table 3-7 Results of Sector Impact Analysis by COVID-19 (Barbados)**

| ECLAC category   | Changes around COVID-19 | Trends before COVID-19 | Total GDP ratio of the sector | comprehensive evaluation |   |
|--|-------------------------|------------------------|-------------------------------|--------------------------|---|
| Importance (weight)  | 0.4590                  | 0.0660                 | 0.0750                        |                          |   |
| Agriculture, livestock, hunting, forestry and fishing                |                         | 4                      | 2                             | 0.009                    | 9 |
| Mining and quarrying   |                         | 9                      | 1                             | 0.0149                   | 5 |
| Manufacturing  |                         | 3                      | 5                             | 0.013                    | 7 |
| Electricity, gas and water   |                         | 5                      | 3                             | 0.012                    | 8 |
| Construction   | 7                       | 1                      | 4                             | 0.148                    | 3 |
| Wholesale and retail commerce, restaurants and hotels                | 9                       | 6                      | 8                             | 0.202                    | 1 |
| Transport, storage and communications                                | 7                       | 7                      | 6                             | 0.160                    | 2 |
| Financial institutions, insurance, real estate and business services |                         | 8                      | 9                             | 0.027                    | 4 |
| Community, social and personal services                              |                         | 2                      | 7                             | 0.0146                   | 6 |

Source: Survey Team

#### 1) ECLAC Sector Classification Amendments to the Sector Classification

In line with the method described in the main volume, the Sector Classification is divided into the Vertical Sector and the Cross-Cutting Sector, the ECLAC classification sector is allocated to the Vertical Sector Classification, and the evaluation of various policies related to COVID-19 taken by the government along with the results of the partner survey and the indicators of the national development

cooperation policy, the ranking of priority sectors are calculated using the four indicators, which are described in the table below.

**Table 3-8 Ranking of Priority Sectors (Barbados)**

|                                   | Economic Indicator Analysis | Government Policy on COVID-19 | Survey on COVID-19 by Development Partners | Country Development Cooperation Policy | Base Case |   | Priority |
|-----------------------------------|-----------------------------|-------------------------------|--|--|-----------|---|----------|
| Importance (weight)               | 0.6000                      | 0.2000                        | 0.1000                                     | 0.1000                                 |           |   |          |
| Social and Economic Policy        | 0.0000                      | 0.0500                        | 0.0000                                     | 0.0000                                 | 0.0500    |   | ○        |
| Health and Nutrition              | 0.0392                      | 0.0167                        | 0.0000                                     | 0.0000                                 | 0.0558    | 5 |          |
| Education                         | 0.0333                      | 0.0167                        | 0.0000                                     | 0.0000                                 | 0.0499    | 6 |          |
| Agriculture and Rural Development | 0.1048                      | 0.0000                        | 0.0000                                     | 0.0000                                 | 0.1048    | 4 |          |
| Manufacturing                     | 0.1416                      | 0.0583                        | 0.0143                                     | 0.0000                                 | 0.2142    | 2 | ○        |
| Environment/ Disaster Management  | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0500                                 | 0.0500    |   | ○        |
| Governance and Security           | 0.0000                      | 0.0250                        | 0.0000                                     | 0.0000                                 | 0.0250    |   | ○        |
| DX Innovation                     | 0.0000                      | 0.0000                        | 0.0429                                     | 0.0000                                 | 0.0429    |   | ○        |
| Infrastructure and Every          | 0.2230                      | 0.0000                        | 0.0143                                     | 0.0250                                 | 0.2623    | 1 | ○        |
| Tourism                           | 0.0583                      | 0.0000                        | 0.0286                                     | 0.0250                                 | 0.1118    | 3 | ○        |
| Public-Private Partnership        | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0000                                 | 0.0000    |   | ○        |

Source: Survey Team

## (2) Sensitivity analysis

### 1) Analysis case settings

Based on the above methodology, the following case settings were made.

**Table 3-9 Sensitivity Analysis Case-based Weighting Settings (Barbados)**

|  | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|--|-----------|------------------------|------------------------|------------------------|
| Economic indicator analysis  | 0.6       | 0.6                    | 0.5                    | 0.5                    |
| Investigation and arrangement of various policies for COVID-19 taken by the government | 0.2       | 0.1                    | 0.1                    | 0.1                    |
| Development partner survey results   | 0.1       | 0.2                    | 0.2                    | 0.3                    |
| Country-specific development cooperation policy  | 0.1       | 0.1                    | 0.2                    | 0.1                    |

Source: Survey Team

### 2) Summary of sensitivity analysis

The results of each sensitivity analysis are as summarized below. Sensitivity analysis did not show much change, which was close to the result of the base case.

**Table 3-10 Summary of Sensitivity Analysis Results (Barbados)**

|                                   | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|-----------------------------------|-----------|------------------------|------------------------|------------------------|
| Social and economic policy        |           |                        |                        |                        |
| Health care / nutrition           | 5         | 5                      | 5                      | 5                      |
| education                         | 6         | 6                      | 6                      | 6                      |
| Agriculture / rural development   | 4         | 4                      | 4                      | 4                      |
| Manufacturing industry            | 2         | 2                      | 2                      | 2                      |
| Environment / disaster prevention |           |                        |                        |                        |
| Governance and citizen security   |           |                        |                        |                        |
| DX / Innovation                   |           |                        |                        |                        |
| Infrastructure and Energy         | 1         | 1                      | 1                      | 1                      |
| sightseeing                       | 3         | 3                      | 3                      | 3                      |
| Public-private partnership        |           |                        |                        |                        |

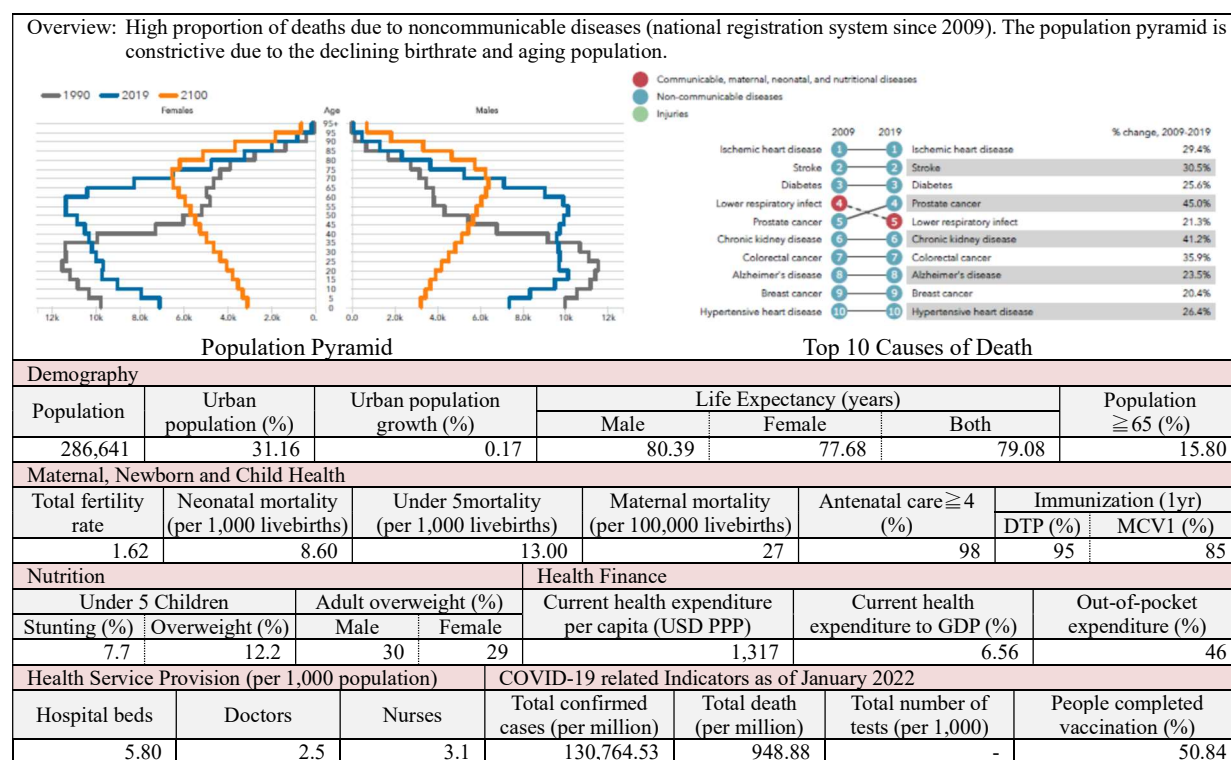
Source: Survey Team

**(3) Selection of priority sectors by country**

From the above results, 1) social / economic policy, 2) manufacturing industry, 3) environment / disaster prevention, 4) governance / citizen security, 5) DX / innovation, 6) infrastructure / energy, 7) tourism, 8) public-private partnership are selected as priority sectors.

### 3.3 Country-specific information by sector

#### 3.3.1 Health care / nutrition



Source: Graphs=Institute for Health Metrics and Evaluation, County Profile; Demography, Total fertility rate, Neonatal mortality, under-5 mortality, Health finance= World Development Indicators, the World Bank (Accessed on Aug 2021); Maternal mortality= UNICEF (Sep 2019); Antenatal care, Immunization, Nutrition, Health service provision,= OECD/The World Bank (2020), Health at a Glance: Latin America and the Caribbean 2020; COVID-19 related indicators= Our World in Data (Accessed on Jan 2022)

| Health                                  |  |
|---|--|
| Leadership/ Governance                  | Responsible Agency: Ministry of Health and Wellness<br><a href="https://www.gov.bb/ministries/health">https://www.gov.bb/ministries/health</a><br>Centralized<br>Major Relevant Policies: National Strategic Plan for Health (NSPH) for the period 2017-2022 |
| Service Providing System                | Public sector covers from primary to tertiary level, but private sector and NGOs also participate.   |
| Health Finance                          | National health insurance, but high out-of-pocket expenses rate  |
| Human Resource for Health               | Well-qualified doctors<br>Around 80% of doctors works in public sector.  |
| IT/ Digital Health                      | Although there is a e-Health strategy, but quality and quantity of human resources is not sufficient. Legislation on information security has not been developed.  |
| Drugs/ Medical Equipment                | A public agency control drugs and medical supplies. Same drugs and medical supplies could be procured both in public and private sectors.  |
| Priority                                | Noncommunicable diseases (diabetes, cardiovascular diseases), disorder in neonatal period, child obesity, mental health  |
| Communicable Disease Emergency Response | Necessary action and responses are undertaken along with IHR.  |
| Major Development Partners              | PAHO/WHO, USAID, PEPFER, UNFPA, UNICEF   |
| Nutrition                               |  |
| Institutional Arrangement               | National Nutrition Centre (affiliated organization of the Ministry of Health and Wellness)   |
| Major Relevant Policies                 | Food and Nutrition Plan of Action, 2002  |
| Human Resource for Health               | Nutrition related degrees: Yes<br>Nutrition related subjects in pre-service education: Yes<br>Number of nutrition related professionals: 5.6 per 100,000 population  |

Source: Survey Team with reference to WHO Country Cooperation Strategy for Barbados at a glance, May 2018, Institute for Health Metrics and Evaluation, County Profile, PAHO, Health Systems and Services Profile Barbados, 2008, WHO, Global atlas of medical devices, 2017, National Health Insurance (<https://www.nhibahamas.gov.bs/nhi-launch-ehr/>) Authority, and WHO, Nutrition Landscape Information System (NLiS)

### 3.3.2 Education

| Overview                              |  |  |            |            |               |         |               |         |                  |    |    |    |    |    |                   |    |    |   |    |    |                           |    |    |    |     |    |                           |    |    |   |     |    |
|---------------------------------------|--|--|------------|------------|---------------|---------|---------------|---------|------------------|----|----|----|----|----|-------------------|----|----|---|----|----|---------------------------|----|----|----|-----|----|---------------------------|----|----|---|-----|----|
| Number of children                    | The number of children is 5,144 for preschool, 19,895 for primary education (public / private), and 19,121 for secondary education (public / private), for a total of 44,160 (2019). The number of teachers is 3,425 (365 kindergartens, 1469 primary schools, 1507 secondary schools, 57 special needs schools). The number of schools are 101 primary schools (public / private), 29 secondary schools (public / private), and kindergartens 10 gardens (Public) and 14 gardens (private) (2015/16). |  |            |            |               |         |               |         |                  |    |    |    |    |    |                   |    |    |   |    |    |                           |    |    |    |     |    |                           |    |    |   |     |    |
| Government authority                  | Ministry of Education, Technology and Vocational Training  |  |            |            |               |         |               |         |                  |    |    |    |    |    |                   |    |    |   |    |    |                           |    |    |    |     |    |                           |    |    |   |     |    |
| Education indicator                   | Net school enrollment rate (2019): Primary education 98.9%, lower secondary 95.0%, upper secondary 94.9%<br>Primary education completion rate (2019) 90.1%, out-of-school children rate (2019) 1.1%  |  |            |            |               |         |               |         |                  |    |    |    |    |    |                   |    |    |   |    |    |                           |    |    |    |     |    |                           |    |    |   |     |    |
| Impact of COVID-19                    |  |  |            |            |               |         |               |         |                  |    |    |    |    |    |                   |    |    |   |    |    |                           |    |    |    |     |    |                           |    |    |   |     |    |
| School closure / reopening            | From March 11, 2020 to February 2, 2021, 95 days were completely closed and 71 days were partially closed. As of October-November 2021, classes are held remotely.   |  |            |            |               |         |               |         |                  |    |    |    |    |    |                   |    |    |   |    |    |                           |    |    |    |     |    |                           |    |    |   |     |    |
| COVID-19 measures                     | N / A  |  |            |            |               |         |               |         |                  |    |    |    |    |    |                   |    |    |   |    |    |                           |    |    |    |     |    |                           |    |    |   |     |    |
| Distance education                    | Implementation status  | Introduced Google Suite for Education and conducted virtual lessons via the platform. Classes are also distributed via TV and radio. In addition, some schools and parents have contracted and utilized US programs and platforms. According to the UNICEF survey, distance learning readiness was the highest, strong policy responses were made to distance learning at almost all levels of education, and distance learning training for teachers was systematically conducted.<br>The government signed a provider contract to expand Internet connection and distributed SIM cards to students. The shortage of children's devices is serious and the government estimates that 6,500 devices will be needed. The Ministry of Education has decided to automatically promote primary and lower secondary school children in 2020.                                  |            |            |               |         |               |         |                  |    |    |    |    |    |                   |    |    |   |    |    |                           |    |    |    |     |    |                           |    |    |   |     |    |
|                                       | Access   | According to UNICEF statistical data, the percentage of school-aged children / students who can connect to the Internet at home (%) (2012) is as follows. There is a considerable gap between the rich and the poor. <sup>6</sup> <table border="1" data-bbox="592 1077 1385 1417"> <thead> <tr> <th></th> <th>Rural area</th> <th>Urban area</th> <th>Poor</th> <th>wealthy class</th> <th>Overall</th> </tr> </thead> <tbody> <tr> <td>Whole school age</td> <td>61</td> <td>69</td> <td>10</td> <td>98</td> <td>66</td> </tr> <tr> <td>Primary Education</td> <td>54</td> <td>68</td> <td>9</td> <td>97</td> <td>63</td> </tr> <tr> <td>Lower secondary education</td> <td>66</td> <td>69</td> <td>20</td> <td>100</td> <td>68</td> </tr> <tr> <td>Upper secondary education</td> <td>76</td> <td>76</td> <td>4</td> <td>100</td> <td>76</td> </tr> </tbody> </table> |            | Rural area | Urban area    | Poor    | wealthy class | Overall | Whole school age | 61 | 69 | 10 | 98 | 66 | Primary Education | 54 | 68 | 9 | 97 | 63 | Lower secondary education | 66 | 69 | 20 | 100 | 68 | Upper secondary education | 76 | 76 | 4 | 100 | 76 |
|                                       |  | Rural area   | Urban area | Poor       | wealthy class | Overall |               |         |                  |    |    |    |    |    |                   |    |    |   |    |    |                           |    |    |    |     |    |                           |    |    |   |     |    |
|                                       | Whole school age   | 61   | 69         | 10         | 98            | 66      |               |         |                  |    |    |    |    |    |                   |    |    |   |    |    |                           |    |    |    |     |    |                           |    |    |   |     |    |
| Primary Education                     | 54   | 68   | 9          | 97         | 63            |         |               |         |                  |    |    |    |    |    |                   |    |    |   |    |    |                           |    |    |    |     |    |                           |    |    |   |     |    |
| Lower secondary education             | 66   | 69   | 20         | 100        | 68            |         |               |         |                  |    |    |    |    |    |                   |    |    |   |    |    |                           |    |    |    |     |    |                           |    |    |   |     |    |
| Upper secondary education             | 76   | 76   | 4          | 100        | 76            |         |               |         |                  |    |    |    |    |    |                   |    |    |   |    |    |                           |    |    |    |     |    |                           |    |    |   |     |    |
| Teacher training                      | The Ministry of Education conducted training on how to use the Google Suite for Education platform for 250 teachers with 100 ICT coordinators. Trained ICT coordinators support teachers and students online, with 96% of public sector teachers receiving support. Also created manuals and videos for teachers and parents, and it can be watched on YouTube.  |  |            |            |               |         |               |         |                  |    |    |    |    |    |                   |    |    |   |    |    |                           |    |    |    |     |    |                           |    |    |   |     |    |
| School hygiene                        | Infection control measures   | Created guidelines for safe school reopening.  |            |            |               |         |               |         |                  |    |    |    |    |    |                   |    |    |   |    |    |                           |    |    |    |     |    |                           |    |    |   |     |    |
|                                       | Facility maintenance   | Almost 100% of schools have basic water, hand-washing facilities, and toilets.   |            |            |               |         |               |         |                  |    |    |    |    |    |                   |    |    |   |    |    |                           |    |    |    |     |    |                           |    |    |   |     |    |
| School lunch / nutrition              | During the school closure period, not provided food as a substitute for school meals.  |  |            |            |               |         |               |         |                  |    |    |    |    |    |                   |    |    |   |    |    |                           |    |    |    |     |    |                           |    |    |   |     |    |
| Countermeasures for vulnerable people | The government provides loans to vulnerable people with the support of IDB.  |  |            |            |               |         |               |         |                  |    |    |    |    |    |                   |    |    |   |    |    |                           |    |    |    |     |    |                           |    |    |   |     |    |
| Support for donors, etc.              | IDB: Strengthening Digital Transformation for Inclusive Education; Digitizing Education Systems, Strengthening Primary School Digital Infrastructure, Teacher Training Reform Plans, Training ICT Coordinators (\$ 150,000)  |  |            |            |               |         |               |         |                  |    |    |    |    |    |                   |    |    |   |    |    |                           |    |    |    |     |    |                           |    |    |   |     |    |

Source: Survey Team

<sup>6</sup>Global database on school-age digital connectivity, UNICEF

### 3.3.3 Agriculture / rural development

|   |  |          |          |          |          |          |
|---|--|----------|----------|----------|----------|----------|
| Urban / rural population ratio                    | 31.1% / 68.9% (FAOSTAT 2018)   |          |          |          |          |          |
| Agricultural land area                            | 10,000 ha (FAOSTAT 2019) 1)  |          |          |          |          |          |
| Agricultural sector employment                    | 2.8% of total employment (FAOSTAT 2019) 2)   |          |          |          |          |          |
| Agricultural GDP                                  | 1.3% of total GDP (FAOSTAT 2019) 6)  |          |          |          |          |          |
| Of the agricultural sector Value added amount     | 63,478.762 \$ 1,000 (FAOSTAT 2019) 3) * Statistical figures include forestry   |          |          |          |          |          |
| Agricultural sector expenditure ratio             | Ratio of agricultural fiscal expenditure to national budget (%) 4)   |          |          |          |          |          |
|   | 2003   | 2005     | -----    |          |          |          |
|   | 2.81   | 2.17     | n / d    |          |          |          |
| Agricultural sector import / export balance       | Trade balance (USD1,000, FAOSTAT) 5)   |          |          |          |          |          |
|   |  | 2015     | 2016     | 2017     | 2018     | 2019     |
|   | export   | 92,512   | 94,421   | 108,663  | 97,726   | 88,826   |
|   | Import   | 323,792  | 320,909  | 327,112  | 334,879  | 335,329  |
|   | Balance of payments  | -231,280 | -226,488 | -218,449 | -237,153 | -246,503 |
| Agricultural development Policy / plan / strategy | <p>GDP in 2019 was \$ 5.29 billion7), of which the agricultural sector accounted for 1.3% 6) of GDP, below the Caribbean average of 4.3% (World Bank) 9). In the same year, the ratio of agricultural workers to all workers (World Bank) 10) was 2.7%, which is lower than the regional average of 10.7%, similar to GDP. The Barbados economy was based on the agricultural sector until the 1980s, but in the 1990s it was replaced by manufacturing and tourism (FAO 2015) 11). Furthermore, in the 2000s, the manufacturing industry fell sharply, and the tourism industry became the main economy (GoB 2008) 12).</p> <p>The main crops are sugar cane, cotton, root vegetables and vegetables. From a food security perspective, the government's agricultural policy is to reduce sugar dependence and diversify into vegetables, poultry, livestock and fisheries, supporting smallholders and providing incentives for this. Yes (GoB 2008) 12). As for the sugar industry, it is trying to promote branding while its dependence or importance is decreasing.</p> <p>The National Agricultural Policy 13), published in 2012, aims to transform the agricultural sector to improve food security, nutrition and health. By supporting agribusiness companies, modernizing the agricultural sector such as establishing a market information system, improving the quality and safety of both locally produced and imported foods such as using HACCP, and raising consumer awareness of the nutritional value of local foods. Focuses on reducing non-infectious chronic diseases such as diabetes, stroke, hypertension, heart attack, obesity and improving food security. The Ministry of Agricultural Food Security has been established to implement this policy.</p> <p>The Caribbean Agricultural Research and Development Institute (CARDI), of which Barbados is a member, is a research and development institute that aims to improve the competitiveness and sustainability of the regional agricultural sector and was established in 1974 by the 12 member countries of CARICOM. Was done. To transform the agricultural sector into a modernized, competitive, innovative and resilient one, CARDI has created a five-year roadmap, Strategic Plan 2018-2022 (14). CARDI divides its member countries into three groups based on the economic structure of each country, and Barbados belongs to the second group. One of the group's strategies is partnership with the private sector, which also includes agritourism and industrial development.</p>  |          |          |          |          |          |
| Impact of COVID-19                                | Barbados is highly dependent on food imports (IDB 2019) 15) and is vulnerable to external shocks such as fluctuations in international prices. COVID-19-related regulations have had a serious impact on the wholesale and retail sectors, but in the agricultural sector, production has increased due to the government's irrigation assistance in 2020, with growth of 1.9%. 16). The increase in production this year was only in the agricultural sector, and the contribution of GDP in the same sector increased by 23.1% year-on-year17).  |          |          |          |          |          |
| Source / reference                                | <p>1) FAOSTAT-Land, Input and Sustainability-Land Use-Area-Agriculture (<a href="https://www.fao.org/faostat/en/#data/RL">https://www.fao.org/faostat/en/#data/RL</a>)</p> <p>2) FAOSTAT- Share of employment in agriculture (% of total employment) &amp; Share of female employment in agriculture (% of employment in agriculture) (<a href="https://www.fao.org/faostat/en/#data/OE">https://www.fao.org/faostat/en/#data/OE</a>)</p> <p>3) FAOSTAT- Value US \$, 2015 prices- Value Added (Agriculture, Forestry and Fishing) (<a href="https://www.fao.org/faostat/en/#data/MK">https://www.fao.org/faostat/en/#data/MK</a>)</p> <p>4) FAOSTAT-Government Expenditure-Share of Total Expenditure-Central Government (<a href="https://www.fao.org/faostat/en/#data/IG">https://www.fao.org/faostat/en/#data/IG</a>)</p> <p>5) FAOSTAT-Trade-Crops and livestock products-Import / Export Value-Agricultural Products (<a href="https://www.fao.org/faostat/en/#data/TCL">https://www.fao.org/faostat/en/#data/TCL</a>)</p> <p>6) FAOSTAT-Macro Indicators-Value US \$-Value Added (Agriculture, Forestry, Fishing) (<a href="https://www.fao.org/faostat/en/#data/MK">https://www.fao.org/faostat/en/#data/MK</a>)</p> <p>7) FAOSTAT-Macro Indicators-Value US \$-Gross Domestic Product (<a href="https://www.fao.org/faostat/en/#data/MK">https://www.fao.org/faostat/en/#data/MK</a>)</p> <p>9) Agriculture, forestry, and fishing, value added (% of GDP) --Caribbean small states, Barbados (<a href="https://data.worldbank.org/indicator/NV.AGR.TOTL.ZS?locations=S3-BB&amp;view=chart">https://data.worldbank.org/indicator/NV.AGR.TOTL.ZS?locations=S3-BB&amp;view=chart</a>)</p> <p>10) Employment in agriculture (% of total employment) (modeled ILO estimate) --Barbados, Caribbean small states (<a href="https://data.worldbank.org/indicator/SL.AGR.EMPL.ZS?end=2019&amp;locations=S3-BB&amp;start=1991&amp;view=chart">https://data.worldbank.org/indicator/SL.AGR.EMPL.ZS?end=2019&amp;locations=S3-BB&amp;start=1991&amp;view=chart</a>)</p> <p>11) Country profile – Barbados, 2015, FA (<a href="https://www.fao.org/3/ca0433en/CA0433EN.pdf">https://www.fao.org/3/ca0433en/CA0433EN.pdf</a>)</p> <p>12) Road Map Towards Integrated Water Resources Management Planning for Barbados (<a href="https://www.iweco.org/sites/default/files/2019-03/GEF_IWCAM_CBRA_Annex_IWRM_RoadMap_sample_%28Barbados%29.pdf">https://www.iweco.org/sites/default/files/2019-03/GEF_IWCAM_CBRA_Annex_IWRM_RoadMap_sample_%28Barbados%29.pdf</a>)</p> <p>13) National Agricultural Policy: A vision for the future of agriculture in Barbados. (<a href="http://extwprlegs1.fao.org/docs/pdf/bar181568.pdf">Http://extwprlegs1.fao.org/docs/pdf/bar181568.pdf</a>)</p> |          |          |          |          |          |



|  |   |
|--|---|
|  | <p>14) CARDI's Strategic Plan 2018-2022 (<a href="http://www.cardi.org/wp-content/uploads/downloads/2018/05/CARDI-Strategic-Plan-2018-to-2022-Final.pdf">http://www.cardi.org/wp-content/uploads/downloads/2018/05/CARDI-Strategic-Plan-2018-to-2022-Final.pdf</a>)</p> <p>15) ANALYSIS OF AGRICULTURAL POLICIES IN Barbados 2016, IDB (<a href="https://publications.iadb.org/publications/english/document/Analysis_of_Agricultural_Policies_in_Barbados_en_en.pdf">https://publications.iadb.org/publications/english/document/Analysis_of_Agricultural_Policies_in_Barbados_en_en.pdf</a>)</p> <p>16) MINISTRO INDAR WEIR: "BARBADOS TRABAJA PARA QUE SUS AGRICULTORES TENGAN MEJOR ACCESO AL AGUA PARA LA PRODUCCIÓN DE ALIMENTOS", 2021, IICA (<a href="https://iica.int/es/prensa/noticias/ministro-indar-weir--trabaja-para-que-sus-agricultores-tengan-mejor-acceso">https://iica.int/es/prensa/noticias/ministro-indar-weir--trabaja-para-que-sus-agricultores-tengan-mejor-acceso</a>)</p> <p>17) Balance Preliminar de las Economías de América Latina y el Caribe, 2020, CEPAL (<a href="https://repositorio.cepal.org/bitstream/handle/11362/46501/BP2020_Barbados_es.pdf?sequence=6">https://repositorio.cepal.org/bitstream/handle/11362/46501/BP2020_Barbados_es.pdf?sequence=6</a>)</p> |
|--|---|

### 3.3.4 Private sector

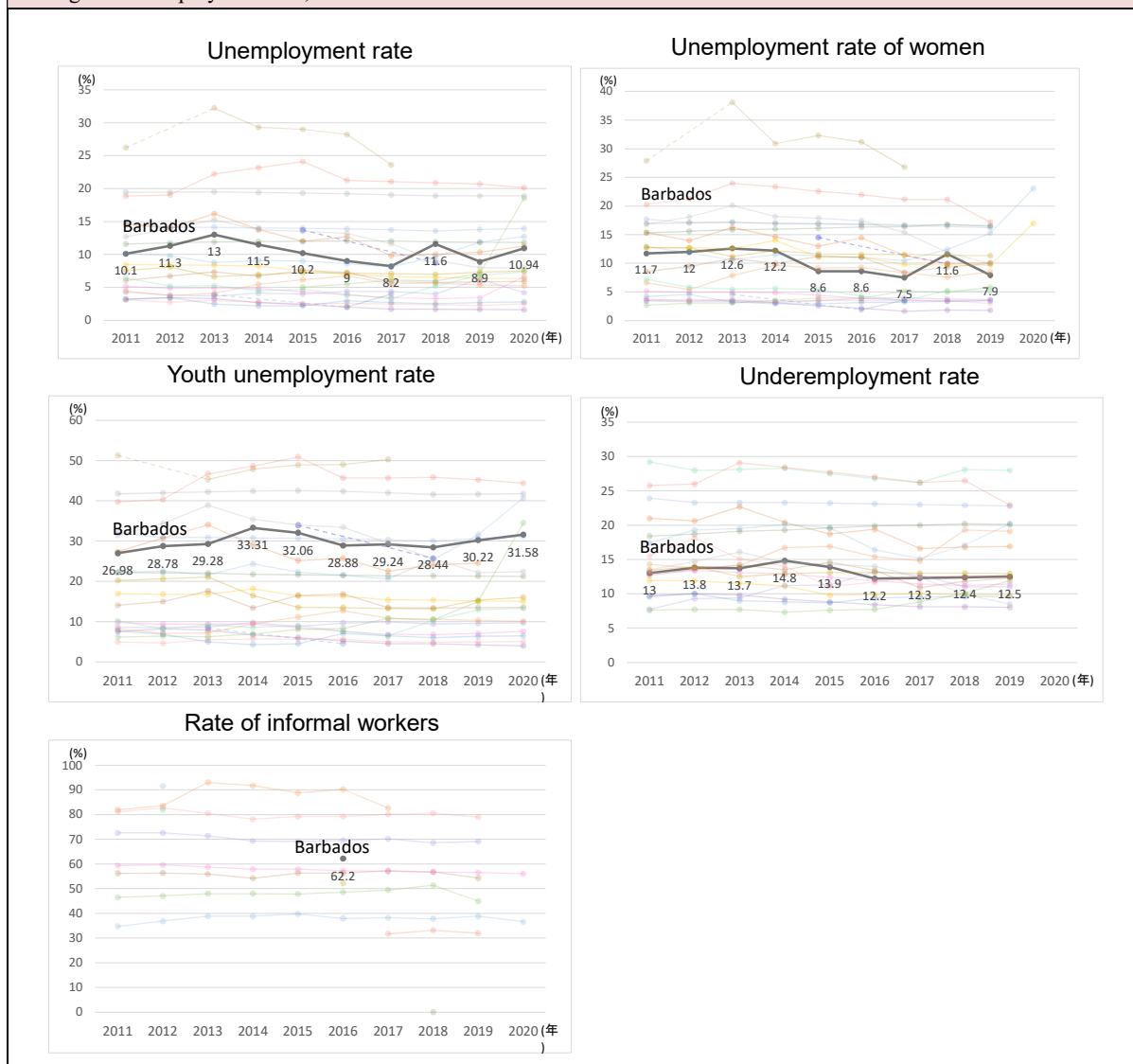
Barbados is a country with a small economy (14th) but a large per capita GDP (4th). The unemployment rate (15th) and youth unemployment (17th) are relatively high, but the female unemployment rate (9th) is relatively low. The informal worker rate is over 60%. GDP per capita and minimum wage belong to the top groups in the region.

|              | Index                      | Value  | Ranking                    | Year | Source                   |
|--------------|----------------------------|--------|----------------------------|------|--------------------------|
| Productivity | GDP per capita (USD)       | 15,191 | 4 (Among 22 countries)     | 2020 | World Bank               |
|              | GDP per worker (USD)       | 32,119 | 9 (Among 18 countries)     | 2019 | World Bank               |
| employment   | Minimum wage (USD / month) | 500    | 3 (Among 23 countries)     | 2019 | ILO                      |
|              | Unemployment rate          | 8.9    | 15 (Among 22 countries)    | 2019 | Central Bank of Barbados |
|              | Female unemployment rate   | 7.9    | 9 (Among 22 countries)     | 2019 | Central Bank of Barbados |
|              | Youth unemployment rate    | 30.22  | 17 17 (Among 22 countries) | 2019 | Statista                 |
|              | Underemployment rate       | 12.5   | 9 (Among 18 countries)     | 2019 | ILO                      |
|              | Informal worker rate       | 62.2   | 7 (Among 12 countries)     | 2016 | ILO                      |

Source: Described in the table



Changes in unemployment rate, etc.



Source: World Bank, ILO, The Global Economy, etc.

### 3.3.5 Environment / disaster prevention

|             | Item   | Data   | Remarks                          |
|-------------|--|--|----------------------------------|
| Environment | Environmental agency                                     | The Ministry of Environment and National Beautification                                    |                                  |
|             | Waste-related organizations                              | Barbados Solid Waste Management Program  |                                  |
|             | Environmental Budget (USD)                               | 2019: 19,883,117<br>2020: 21,429,858<br>2021: 21,948,365<br>Three-year average: 21,087,113 | Average: 6th out of 23 countries |
|             | Environmental budget per capita (2019-2021 average, USD) | 73.5   | 2nd out of 23 countries          |
|             | Budget ratio to national budget (2019)                   | 1.25%  | 3rd out of 23 countries          |
|             | Donor support status                                     | 0 cases  | As of May 2021                   |
|             | Renewable energy power generation (GWh) (2019)           | 44   | IRENA, 2021                      |
|             | Geothermal power generation capacity (MWe)               | 2020: 0<br>2025 Forecast: 0  | WGC, 2020                        |

|                     | Item   | Data                                 | Remarks                          |
|---------------------|--|--------------------------------------|----------------------------------|
| Disaster prevention | Disaster prevention organization                   | Department of Emergency Management   |                                  |
|                     | Donor support status                               | 1                                    | As of May 2021                   |
|                     | Number of natural disasters (2010-2020)            | 1<br>Major disasters: drought, flood |                                  |
|                     | Number of victims (persons) per 100,000 population | 0 people                             | 17th or lower among 23 countries |

Source: Survey Team

### 3.3.6 Governance and citizen security

| Item  | Overview  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|---|---|-----------|----------------------------|------|----------------------------|--------------------------|-----------------------------|------|-----|------|-----|------|-----|----------|------|-----|------|-----|------|-----|---|-----------------------------|------|-----|------|-----|------|-----|----------|------|-----|------|-----|------|-----|--------------------------|-----------------------------|------|-----|------|-----|------|-----|----------|------|-----|------|-----|------|-----|--------------------|-----------------------------|------|-----|------|-----|------|-----|----------|------|-----|------|-----|------|-----|-------------|-----------------------------|------|-----|------|-----|------|-----|----------|------|-----|------|-----|------|-----|-----------------------|-----------------------------|------|-----|------|-----|------|-----|----------|------|-----|------|-----|------|-----|
| Political system                                      | Parliamentary democracy under the constitutional monarchy belonging to the Commonwealth of Nations  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
| Election system                                       | Free and regular elections are held. The monarch is hereditary. The governor-general appointed by the monarch appoints the head of a majority party or coalition government as prime minister after the legislative elections. The prime minister recommends a deputy prime minister.   |           |                            |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
| Legislative system                                    | Bicameral parliament  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
| Most recent / next legislative election               | Senate: June 5, 2018 (next term unknown)<br>House of Representatives: May 24, 2018 (next term is scheduled for 2023)  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
| Judicial system<br>Appointment and term of judge      | The Supreme Court is appointed by the governor at the recommendation of the Prime Minister and the leader of the opposition party in Parliament. Other judges are appointed by the governor-general based on the recommendation of the Justice Committee, which is an independent body consisting of a total of five members, the director of the Supreme Court, those recommended by the prime minister, and those appointed by the governor-general.  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
| Political stability                                   | Stable for the past 10 years  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
| “Worldwide Governance Indicators”                     | <p>Governance indicators are generally above the regional average.</p> <table border="1"> <caption>Worldwide Governance Indicators Data (Approximate Percentile Ranks)</caption> <thead> <tr> <th>Indicator</th> <th>Country</th> <th>Year</th> <th>Percentile Rank (0 to 100)</th> </tr> </thead> <tbody> <tr> <td rowspan="6">Voice and Accountability</td> <td rowspan="2">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Barbados</td> <td>2010</td> <td>~85</td> </tr> <tr> <td>2019</td> <td>~85</td> </tr> <tr> <td>2020</td> <td>~85</td> </tr> <tr> <td rowspan="6">Political Stability and Absence of Violence/Terrorism</td> <td rowspan="2">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~45</td> </tr> <tr> <td>2019</td> <td>~45</td> </tr> <tr> <td>2020</td> <td>~45</td> </tr> <tr> <td rowspan="3">Barbados</td> <td>2010</td> <td>~85</td> </tr> <tr> <td>2019</td> <td>~85</td> </tr> <tr> <td>2020</td> <td>~85</td> </tr> <tr> <td rowspan="6">Government Effectiveness</td> <td rowspan="2">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~45</td> </tr> <tr> <td>2019</td> <td>~45</td> </tr> <tr> <td>2020</td> <td>~45</td> </tr> <tr> <td rowspan="3">Barbados</td> <td>2010</td> <td>~85</td> </tr> <tr> <td>2019</td> <td>~85</td> </tr> <tr> <td>2020</td> <td>~85</td> </tr> <tr> <td rowspan="6">Regulatory Quality</td> <td rowspan="2">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~45</td> </tr> <tr> <td>2019</td> <td>~45</td> </tr> <tr> <td>2020</td> <td>~45</td> </tr> <tr> <td rowspan="3">Barbados</td> <td>2010</td> <td>~85</td> </tr> <tr> <td>2019</td> <td>~85</td> </tr> <tr> <td>2020</td> <td>~85</td> </tr> <tr> <td rowspan="6">Rule of Law</td> <td rowspan="2">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~45</td> </tr> <tr> <td>2019</td> <td>~45</td> </tr> <tr> <td>2020</td> <td>~45</td> </tr> <tr> <td rowspan="3">Barbados</td> <td>2010</td> <td>~85</td> </tr> <tr> <td>2019</td> <td>~85</td> </tr> <tr> <td>2020</td> <td>~85</td> </tr> <tr> <td rowspan="6">Control of Corruption</td> <td rowspan="2">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~45</td> </tr> <tr> <td>2019</td> <td>~45</td> </tr> <tr> <td>2020</td> <td>~45</td> </tr> <tr> <td rowspan="3">Barbados</td> <td>2010</td> <td>~85</td> </tr> <tr> <td>2019</td> <td>~85</td> </tr> <tr> <td>2020</td> <td>~85</td> </tr> </tbody> </table> | Indicator | Country                    | Year | Percentile Rank (0 to 100) | Voice and Accountability | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Barbados | 2010 | ~85 | 2019 | ~85 | 2020 | ~85 | Political Stability and Absence of Violence/Terrorism | * Latin America & Caribbean | 2010 | ~45 | 2019 | ~45 | 2020 | ~45 | Barbados | 2010 | ~85 | 2019 | ~85 | 2020 | ~85 | Government Effectiveness | * Latin America & Caribbean | 2010 | ~45 | 2019 | ~45 | 2020 | ~45 | Barbados | 2010 | ~85 | 2019 | ~85 | 2020 | ~85 | Regulatory Quality | * Latin America & Caribbean | 2010 | ~45 | 2019 | ~45 | 2020 | ~45 | Barbados | 2010 | ~85 | 2019 | ~85 | 2020 | ~85 | Rule of Law | * Latin America & Caribbean | 2010 | ~45 | 2019 | ~45 | 2020 | ~45 | Barbados | 2010 | ~85 | 2019 | ~85 | 2020 | ~85 | Control of Corruption | * Latin America & Caribbean | 2010 | ~45 | 2019 | ~45 | 2020 | ~45 | Barbados | 2010 | ~85 | 2019 | ~85 | 2020 | ~85 |
| Indicator   | Country   | Year      | Percentile Rank (0 to 100) |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
| Voice and Accountability                              | * Latin America & Caribbean   | 2010      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2019      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   | 2020  | ~55       |                            |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   | Barbados  | 2010      | ~85                        |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2019      | ~85                        |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2020      | ~85                        |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
| Political Stability and Absence of Violence/Terrorism | * Latin America & Caribbean   | 2010      | ~45                        |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2019      | ~45                        |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   | 2020  | ~45       |                            |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   | Barbados  | 2010      | ~85                        |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2019      | ~85                        |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2020      | ~85                        |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
| Government Effectiveness                              | * Latin America & Caribbean   | 2010      | ~45                        |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2019      | ~45                        |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   | 2020  | ~45       |                            |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   | Barbados  | 2010      | ~85                        |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2019      | ~85                        |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2020      | ~85                        |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
| Regulatory Quality                                    | * Latin America & Caribbean   | 2010      | ~45                        |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2019      | ~45                        |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   | 2020  | ~45       |                            |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   | Barbados  | 2010      | ~85                        |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2019      | ~85                        |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2020      | ~85                        |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
| Rule of Law   | * Latin America & Caribbean   | 2010      | ~45                        |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2019      | ~45                        |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   | 2020  | ~45       |                            |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   | Barbados  | 2010      | ~85                        |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2019      | ~85                        |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2020      | ~85                        |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
| Control of Corruption                                 | * Latin America & Caribbean   | 2010      | ~45                        |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2019      | ~45                        |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   | 2020  | ~45       |                            |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   | Barbados  | 2010      | ~85                        |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2019      | ~85                        |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2020      | ~85                        |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
| Global freedom status                                 | 95/100 points (citizen rights: 38/40 points, political rights: 57/60 points)<br>Classified as "free country" (Freedom House 2021)   |           |                            |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
| Corruption Perception Index (CPI)                     | 29 / 180th (1st in Central America / Caribbean, 3rd in Latin America), 64/100 points (Transparency International 2020). Looking at WGI, "control of corruption" ranks second in Latin American countries and first in the Caribbean region of Central America, but issues of corruption in public offices and low transparency of the government (Freedom House (2021)).  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
| E-government development index                        | Barbados' e-Government Development Index is the highest in the Caribbean. The National ID Card Replacement Project started in 2020.   |           |                            |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
| Rule of law   | Although it has deteriorated slightly in recent years, according to WGI, it remains higher than the Caribbean average.  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
| Citizen Security                                      | The homicide rate is lower than the Caribbean average, but higher than the world average. The homicide rate in 2018 was 9.8 / 100,000 (the same year, the Caribbean average was 12.1 and the world average was 5.8) (UNODC 2021). Rather than murder, general crimes such as theft,   |           |                            |      |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |

|  |  |
|--|--|
|  | robbery, and the use of marijuana are more important issues. |
|--|--|

Source: Survey Team

### 3.3.7 DX / Innovation

|                                 |   |   |
|---------------------------------|---|---|
| Basic indicators and statistics | E-Government Ranking <sup>1)</sup> : 62nd       | Radar chart of e-government ranking<br> |
|                                 | Mobile connection index <sup>2)</sup> : 64.7    |   |
|                                 | Network Infrastructure Index: 65.6              |   |
|                                 | Internet user rate 81.8                         |   |
|                                 | Mobile connection rate 105.4                    |   |
|                                 | Fixed broadband rate 37.2                       |   |
|                                 | Increase rate of Internet users 0.1 (2021/2020) |   |

#### Communication network

FLOW (formerly known as LIME, under the control of Liberty Global, a US company since 2016), owned by the UK company Cable & Wireless, Barbados' leading telecommunications service provider, offers landline, internet, mobile and entertainment packages. A complete telecommunications provider. Like many other Caribbean islands, C & W has a history of monopolizing the market as a telecommunications service provider <sup>3)</sup>. After repeated negotiations with the WTO since 1997, it promised to open the market in stages <sup>4)</sup>, but the monopoly by C & W continued until 2011 <sup>3)</sup>.

Other Internet service providers on the island now include Telebarbados and Sunbeach, which also offer mobile phone subscriptions, but the Caribbean Islands-based Irish company Digicel has entered as the largest mobile phone service provider. (Market Char 57% <sup>5)</sup>) Competition is intensifying.

The 2019 telecommunications sector index (numbers in parentheses are Latin American and Caribbean averages) is mobile phone penetration <sup>6)</sup> 114.7% (101.5%), landline penetration <sup>7)</sup> 44.6% (15.2%), fixed broadband The penetration rate is 37.2% (14.4%), which exceeds the regional average and has achieved great growth.

The active mobile broadband penetration rate <sup>8)</sup> 45.3% (2017) is significantly lower than the regional average penetration rate of 89.5%, but due to the geographical restrictions of the island nation, the spread of 4G / LTG is slow and it is not suitable for mobile broadband services. It seems that the reason is that the number of 2G technology users is still high at about 40% <sup>9)</sup>.

The telecommunications unit <sup>10)</sup>, a government agency, is in accordance with the Fair Trade Commission <sup>11)</sup> (FTC) and the Telecommunications Act, where Barbados is an outstanding research center for information technology and telecommunications in the Caribbean, and the role of the FTC is telecommunications. It is an agency that implements established policies under the law, regulates competition between telecommunications carriers and service providers, and guarantees the interests of consumers.

#### National Strategy for Digital Transformation

Innovation, Science and Technology Development Strategy in Growth and Development Strategy (MGDS) 2013-2020<sup>12)</sup>, Internet Traffic Management Efficiency, Early Warning and Mitigation of Cyber Attacks, Privacy and Data Protection Acts, Computer Misuse Acts, and Communication Act B282 Improvements etc. are shown.

Digital strategies include interoperability, security, data protection privacy, technology neutral, convergence and brick access in the National ICT Strategic Plan 2010-2015 and focusing and dealing with these issues<sup>13)</sup>. The following six strategic directions are clarified by effectively utilizing ICT as a tool for national development.

1) Development of ICT literacy society, 2) Promotion of innovation and entrepreneurship, 3) Universal access, 4) Investment in human capital, legal and regulatory framework, 5) To public and private sector e-environment Transformation, 6) Stabilization of governance and strengthening resilience in the event of a national disaster

#### Characteristic efforts

The United Nations Development Program (UNDP) in Barbados and the East Caribbean region focuses on the economic transformation and recovery of micro enterprises (MSMEs) as part of the COVID-19 recovery program and is called the #eFUTURE Initiative <sup>14)</sup>. It includes a powerful promotion program for the digitization of MSME operations. From this program, Farmfinder Global Inc<sup>15)</sup>, based in Barbados and the East Caribbean, has launched a new platform that allows fishermen and farmers to arrange the sale, sale and delivery of produce at no additional cost. Farmfinder is a Barbados-based non-profit organization that offers an online platform business that connects producers and buyers, as well as public training such as webinars on corporate pivot strategies using digital tools. It also incorporates themes related to knowledge acquisition, traceability, sustainable management, and quality control of the E-Commerce platform.

#### source

1. E-Gov-Index: a composite indicator that consists of three indexes (Online Service Index, Telecommunication Infrastructure Index and Human Capital Index), which are equally weighted. It ranges from 0 to 1, with 1 being the most developed.
2. Mobile Connectivity Index: an input index developed by GSMA to measure the performance against the four key enablers of mobile internet adoption – infrastructure, affordability, consumer readiness and content. (<https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2016/06/Mobile-Connectivity-Launch-Report.pdf>)
3. Barbados Trade and Integration as a Strategy for Growth  
<https://tfe.estadonacion.or.cr/documentos/pdfs/64Jimenez2004.pdf>
4. Barbados: Telecommunications Liberalization  
[https://www.wto.org/english/res\\_e/booksp\\_e/casestudies\\_e/case4\\_e.htm](https://www.wto.org/english/res_e/booksp_e/casestudies_e/case4_e.htm)
5. Airtime API for Digicel and Flow in Barbados  
<https://operators.reloadly.com/digicel-flow-barbados-airtime-api/>
6. Mobile cellular subscriptions (per 100 people)-Latin America & Caribbean, Barbados  
<https://data.worldbank.org/indicator/IT.CEL.SETS.P2?locations=ZJ-BB>
7. Fixed telephone subscriptions (per 100 people) –Latin America & Caribbean, Barbados  
<https://data.worldbank.org/indicator/IT.MLT.MAIN.P2?locations=ZJ-BB>

|     |  |
|-----|--|
| 8.  | <a href="https://etradeforall.org/wp-content/uploads/countryprofiles/2021/BARBADOS.pdf">https://etradeforall.org/wp-content/uploads/countryprofiles/2021/BARBADOS.pdf</a>  |
| 9.  | Why is mobile broadband quality so important for development?<br><a href="https://idbinvest.org/en/blog/development-impact/why-mobile-broadband-quality-so-important-development">https://idbinvest.org/en/blog/development-impact/why-mobile-broadband-quality-so-important-development</a> |
| 10. | TELECOMMUNICATIONS UNIT<br><a href="https://www.telecoms.gov.bb/">https://www.telecoms.gov.bb/</a>   |
| 11. | Fair Trading Commission<br><a href="https://commerce.gov.bb/fair-trading-commission/">https://commerce.gov.bb/fair-trading-commission/</a>   |
| 12. | Growth and Development Strategy (MGDS) 2013-2020<br><a href="http://observatorioplanificacion.cepal.org/sites/default/files/plan/files/BarbadosSBGDS20132020.pdf">http://observatorioplanificacion.cepal.org/sites/default/files/plan/files/BarbadosSBGDS20132020.pdf</a>                    |
| 13. | National ICT strategic Plan of Barbados 2010-2015<br><a href="http://www.caribbeanelections.com/eDocs/strategy/bb_strategy/bb_National_ICT_Strategic_Plan_Final_2010.pdf">http://www.caribbeanelections.com/eDocs/strategy/bb_strategy/bb_National_ICT_Strategic_Plan_Final_2010.pdf</a>     |
| 14. | <a href="https://www.bb.undp.org/content/barbados/en/home/COVID-19--response-programme/efuture.html">https://www.bb.undp.org/content/barbados/en/home/COVID-19--response-programme/efuture.html</a>  |
| 15. | <a href="https://farmfinderglobal.org/">https://farmfinderglobal.org/</a>  |

### 3.3.8 Infrastructure and Energy

| Transport                                 |   |
|---|---|
| Overview                                  | Inland transportation is mainly by car.<br>The main public transportation is buses and taxis.   |
| Leadership governance                     | Ministry of Transport, Works and Maintenance<br>Transport Authority   |
| Major development partners                | IADB  |
| Energy and electricity                    |   |
| Overview                                  | The supply of both primary and electricity energy relies heavily on imported fossil fuels, with the exception of solar power, which accounts for only 5% of electricity supply. |
| Carbon neutral national plan              | Barbados National Energy Policy 2019-2030<br>Renewable energy generation target: 100% by 2030   |
| Leadership governance and utility company | Ministry of Energy, Small Business and Entrepreneurship (MESBE)<br>Barbados Light & Power Company (BL&P)  |
| Major development partners                | JICA / UNDP / IADB  |

Source: JICA Study Team with reference to various websites of the government organization and international organization (WB / IEA / IRENA / US DOE).

### 3.3.9 Tourism

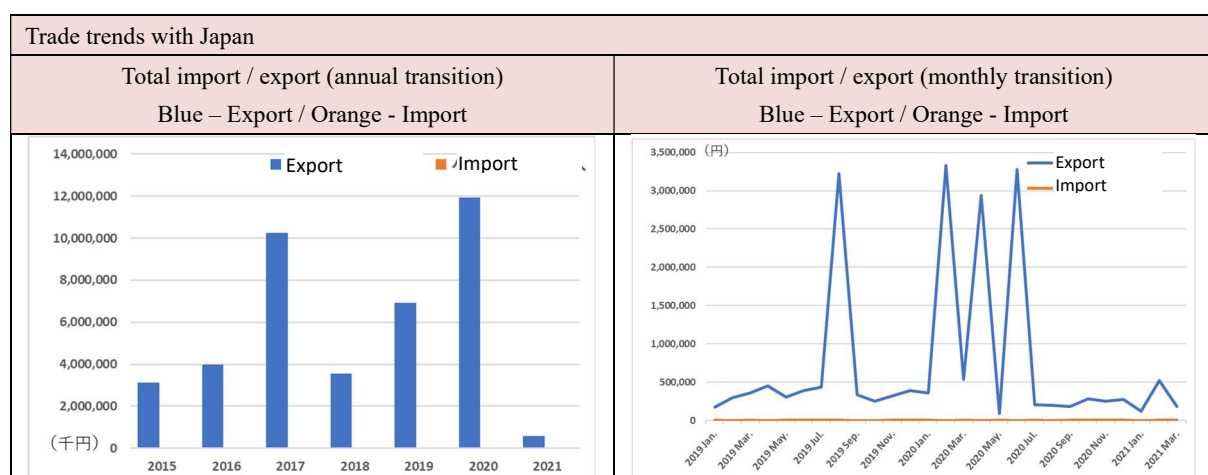
The UK is the largest market of international tourists.

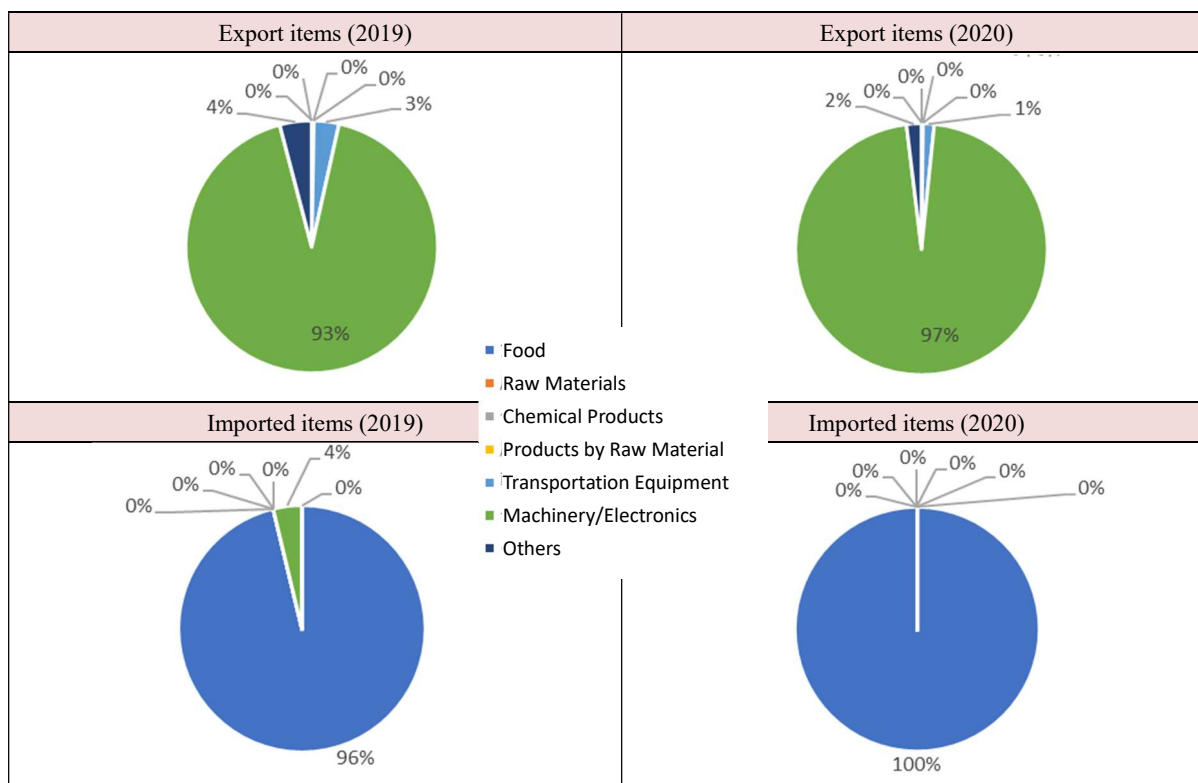
|  |  |  |
|--|--|--|
| Number of international tourist arrivals (2018)              |  | 680 thousand   |
| International Tourism Receipts (2019)                        |  | USD 1,269 million  |
| Tourism Competitiveness Ranking (2019)                       |  | N / A  |
| Tourism Dependency Index (2019)                              |  | 41.4 (11th out of 166 countries)   |
| Government of Japan policy                                   | Number of JICA projects in the last 10 years   | none   |
|  | References to the Country Assistance Policy  | none   |
|  | Interest in pilot projects   | N / A  |
| Tourism industry vulnerability                               | Contribution of Travel & Tourism to GDP (2019)   | 30.9% (8th out of 23 countries)  |
|  | Contribution of Travel & Tourism to employment (2019)  | 33.4% (9th out of 23 countries)  |
|  | Ratio of international spending (2019)   | 91% (6th out of 23 countries)  |
|  | Top 3 countries of origin of visitors (2019)   | UK (32.77%)<br>USA (32.28%)<br>Canada (11.84%)   |
| Importance of tourism  | Ratio of the budget amount of tourism-related ministries to the national budget amount (2019)            | 0.7% (10th out of 16 countries)<br>National budget: BBD 3,180,812,917<br>Budget of tourism-related ministries: BBD 23,177,034                    |
|  | Whether or not it is mentioned as a priority sector in the National Economic and Social Development Plan | Yes<br>Plan name: Growth and Development Strategy 2013-2020<br>Reference example: 5.3.1 Tourism (p. 43) as one of 5.3 Sectoral Growth Strategies |
|  | Existence of effective national tourism policies / strategies / plans                                    | Yes (Barbados Tourism Mater Plan)  |
| Impact of COVID-19   | Changes in the contribution of Travel & Tourism to GDP (2019 → 2020)                                     | -53.5% (16th out of 23 countries)  |
|  | Changes in the contribution of Travel & Tourism to employment (2019 → 2020)                              | -26.1% (13th out of 23 countries)  |
| Number of government support measures for the tourism sector |  | 4 (Resume tourism: 1, Health and safety protocol: 1, Domestic travel: 1, Others: 1)  |

Source: Survey Team

### 3.3.10 Public-private partnership

|  | item   | Contents    |
|--|--|-------------|
| No. of JICA Public-Private Partnership Projects (After 2012)                 | Cooperation preparatory survey (overseas investment and financing) (former PPP infrastructure project)           | 0 cases     |
|  | Overseas investment and loan   | 0 cases     |
|  | SME Partnership Promotion Survey (support for Small-sized Enterprise)  | 0 cases     |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for small- and medium- sized enterprise) | 0 cases     |
|  | SDGs Business Verification Survey with Private Sector (support for small- and medium- sized enterprise)          | 0 cases     |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for large enterprise)                    | 0 cases     |
|  | SDGs Business Verification Survey with Private Sector (support for large enterprise)                             | 0 cases     |
| Total number of Japanese private companies entering the market (2019 survey) | Total number of business locations   | 1 company   |
|  | Overseas branches of Japanese companies,   | 0 companies |
|  | Local corporations wholly owned by Japanese companies and their branches   | 1 company   |
|  | Branch offices wholly owned by Japanese companies and their branches   | 0 companies |
|  | joint ventures (local corporations in which Japanese companies have a direct or indirect stake of 10% or more)   | 0 companies |
|  | joint ventures (Branch offices in which Japanese companies have a direct or indirect stake of 10% or more)       | 0 companies |
|  | companies established overseas by Japanese nationals (in which Japanese nationals have a stake of 10% or more)   | 0 companies |
|  | Unknown classification   | 0 companies |
| Number of Japanese residents (2020 survey)                                   | Total  | 23 people   |
|  | Long-term residents  | 20 people   |
|  | Permanent resident   | 3 persons   |
| Business Environment   | Doing Business 2020 Rank   | 128th place |
| PPP Project  | Existence of PPP law scheme  | ×           |
|  | PPP project with Japanese companies  | 0 cases     |





**Gathering information about the PPP system**

| N°  | Task Item   | Inquiries/comments/status<br>Title of submitted file   | Source/URL   |
|-----|---|--|--|
| 1   | <b>PRIORITY 4. PPP Sector</b>   |  |  |
| 1.1 | PPP Projects in selective countries<br>PPP rules and regulations in Central America and Caribbean Countries |  | All below can be useful  |
| A   | PPP laws and Regulations<br>if there is any, when, and how  | There is no PPP Law  | <a href="https://infrascope.eiu.com/wp-content/uploads/2019/04/EIU_2019-IDB-Infrascope-Report_FINAL_ESP.pdf">https://infrascope.eiu.com/wp-content/uploads/2019/04/EIU_2019-IDB-Infrascope-Report_FINAL_ESP.pdf</a>  |
| B   | PPP Unit Organization<br>if there is any, how structured  | There is no PPP Unit Organization  | <a href="https://infrascope.eiu.com/wp-content/uploads/2019/04/EIU_2019-IDB-Infrascope-Report_FINAL_ESP.pdf">https://infrascope.eiu.com/wp-content/uploads/2019/04/EIU_2019-IDB-Infrascope-Report_FINAL_ESP.pdf</a>  |
| C   | PPP sectors<br>in what sectors are the PPPs allowed   | -  |  |
| D   | Proposal Types (Solicited or Unsolicited)<br>unsolicited  | -  |  |
| E   | PPP Forms<br>BOT, BTO, DB, ..., what form are allowed   | -  |  |
| F   | PPP types<br>Availability payment, service purchase   | -  |  |
| G   | PPP Project Trends<br>how much PPP projects in the last 10 years  | -  |  |
| H   | Participation of Japanese firms in PPP Projects<br>if any (check news source)                               | -  |  |
|     | Any notable points for each country<br>if any   | The search was carried out on different official websites, we found that there is a PPP for the Barbados Airport but there was a delay | - <a href="https://www.bnamericas.com/es/noticias/barbados-posterga-app-para-aeropuerto-internacional">https://www.bnamericas.com/es/noticias/barbados-posterga-app-para-aeropuerto-internacional</a><br>- <a href="https://www.bnamericas.com/es/noticias/barbados-planea-app-para-ampliar-aeropuerto">https://www.bnamericas.com/es/noticias/barbados-planea-app-para-ampliar-aeropuerto</a> |

Source: Survey Team

## 4. Belize

### 4.1 Country overview

#### 4.1.1 Basic information

Belize is a parliamentary monarchy of the Commonwealth Realm, located at the base of the Yucatan Peninsula in northeastern Central America. It borders Mexico to the north and Guatemala to the west, with Honduras across the Gulf of Honduras to the southeast and facing the Caribbean Sea to the east. The capital is Belmopan and the largest city is Belize City. Blessed with beautiful seas and coral reefs, it is known as the "jewel of the Caribbean". There are about 450 remote islands along the coastline, including Ambergris Caye, the largest island in Belize, and it is known as a resort area. Belize became part of Guatemala's territory due to the colonization of the Americas by Spain, but the Belize area beyond the jungle was not governed, and British settlements have been formed since the 17th century. It was. In 1862, formed British Honduras with Jamaica in the Caribbean Sea. For this reason, the old name was changed to British Honduras in 1973. Although GDP per capita is higher than that of Guatemala and Honduras, it is less than half that of Mexico, making it the most underdeveloped country in Central America. Agricultural products include sugar, citrus fruits, and bananas. The fishing industry is thriving and spiny lobsters land 537 tons a year. The operation of Belize fishing vessels, which are not members of the International Committee for the Conservation of Tuna, has become a problem over tuna, whose population has been drastically reduced due to overfishing. In addition, there are abundant timber resources. Since the 1980s, drug gangsters have also increased trade in marijuana and Colombian cocaine by smuggling them into the United States. It is a member of the Caribbean Community.<sup>7</sup>

#### 4.1.2 General circumstances

|             |  |                 |   |
|-------------|--|-----------------|---|
| 1 area      | 22,970 square kilometers (slightly larger than Shikoku)            | 2 Population    | 390,000 (2019 World Bank)   |
| 3 Capital   | Belmopan   | 4 ethnic groups | Mestizo (52.9%), Creole (25.9%), Maya (11.3%), Garifuna (6.1%), East Indian (3.9%), Mennonite (3.6%), Caucasian (1.2%), Asian (1.0%), Others (1.5%) |
| 5 languages | English (official language), Spanish, Belizean Creole, Mopan, etc. | 6 religion      | Christianity (Catholic, Protestant, Anglican, etc.), etc.   |

Source: Ministry of Foreign Affairs HP Belize Basic Data

#### 4.1.3 Economic overview

|                          |  |                              |   |
|--------------------------|--|------------------------------|---|
| 1 Major industry         | Tourism, agriculture (sugar, citrus, banana), fishery  | 2 GNI<br>3 GNI / person      | US \$ 1,735 million (World Bank 2019)<br>US \$ 6,560 (2019) |
| 4 Economic growth rate   | 0.3% (2019 World Bank)   | 5 Unemployment rate          | 6.4% (2019) (World Bank (Source ILO))                       |
| 6 Price increase rate    | 1.1% (2017), 0.2% (2018 estimate), 0.2% (2019 estimate), 0.8% (2020 estimate) (IMF)  |                              |   |
| 7 Total trade amount     | Exports: US \$ 406.2 million (goods only) (2019 WTO)<br>Import: US \$ 908.6 million (goods only) (2019 WTO)  |                              |   |
| 8 Major trade items      | Exports: crude oil, sugar, bananas, marine products, wood<br>Imports: Fuel, Machinery, Cars, Machine Transport, Food and Beverages, Tobacco  |                              |   |
| 9 Major trading partners | Exports: UK, US, EU, Jamaica, Trinidad and Tobago<br>Imports: USA, China, Mexico, Guatemala, Panama (2019 WTO)   |                              |   |
| 10 currencies            | Belize dollar  | 11 Foreign currency reserves | na  |
| 12 National budget       | USD2,502,942 (2019)  | 13 External debt balance     | na  |
| 14 Economic overview     | The main industry is agriculture such as sugar, bananas and citrus fruits, which account for about 70% of the total foreign currency income and about 20% of the labor force. In the future, in addition to diversifying the production of agricultural products other than sugar and bananas, the promotion of the processing industry will be an issue. Recently, the weight of service industries such as tourism has |                              |   |

<sup>7</sup>It is said that most of these fishing vessels are Taiwanese and Chinese-owned fishing vessels whose registrations have been changed to avoid regulations (<https://ja.wikipedia.org/wiki/%E3%83%99%E3%83%A0%E3%83%BC%E3%82%BA>)



|  |   |
|--|---|
|  | increased. In 2020, the impact of the new coronavirus infection will reduce exports of agricultural products and timber to the United States and the EU, and the tourism industry will be hit by the closure of the border. Attention will be paid to whether or not to plan. |
|--|---|

Source: Ministry of Foreign Affairs HP Belize Basic Data

#### 4.1.4 Country-specific development cooperation policy

##### (1) Government of Japan Development Cooperation Policy by Country

**Table 4-1 Overview of Japan's ODA to Belize**

|  |  |
|--|--|
| <b>1. 1. Overview</b>  |  |
| Japan's economic cooperation with Belize began with the acceptance of trainees in 1986, followed by grassroots and human security grant aid in 1996, cultural grant aid in 1997, and Japan Overseas Cooperation Volunteers in 2000. JOCV has started dispatching. As one of the major donor countries, Japan is currently implementing technical cooperation and grant-in-aid for aid that contribute to disaster prevention / environmental efforts and disparity correction.   |  |
| <b>2. 2. Aim of development cooperation</b>  |  |
| There are many island nations in the Caribbean region where the members of the Caribbean Community (Calicom) including Belize are located, and natural disasters such as hurricanes, earthquakes, and tsunamis occur frequently, and the sustainable use of marine biological resources is promoted. It has something in common with Japan in terms of promotion. In addition to being vulnerable to climate change and natural disasters, Calicom member countries are based on industries that have a small population and economy and are susceptible to external factors such as agriculture, fisheries, and tourism. All 14 countries are included in the list of small island developing states published by the United Nations Secretariat. In order to overcome the vulnerabilities peculiar to small island developing states in the Calicom countries, it is necessary to cooperate by utilizing Japan's technology and knowledge in addition to deepening bilateral relations and socio-economics of each country. It is important from the viewpoint of financial stability and sustainable growth of the entire region.       |  |
| <b>3. 3. Basic policy</b>  |  |
| In the Development Cooperation Charter, even if the per capita income is at a certain level, for countries with special vulnerabilities such as small island developing states, necessary cooperation will be provided according to the actual development needs and burden capacity of each country. For the Caribbean Community (Calicom) member countries, the first is based on the Japan-Calicom Joint Ministerial Statement adopted at the 4th Japan-Calicom Foreign Ministers' Meeting held in November 2014. In order to "cooperate for sustainable development including overcoming vulnerabilities peculiar to small island developing states", we will develop cooperation that makes use of Japan's technology and knowledge. In accordance with these policies, we will support Belize to overcome the vulnerabilities peculiar to small island developing states by supporting environmentally friendly sustainable social development and disaster prevention efforts. We also reaffirmed that we will cooperate in accordance with this policy at the 5th Japan-Calicom Foreign Ministers' Meeting held in September 2016. |  |
| <b>4. Priority areas</b>   |  |
| (1) Disaster prevention / environment: Strengthen the ability to respond to natural disasters such as hurricanes and floods, and provide necessary support for overcoming vulnerabilities peculiar to small island developing states in fields such as climate change countermeasures and waste management. implement. Also pay attention to sharing knowledge with other Calicom member countries.  |  |
| (2) Disparity correction: Improve disparity by providing support to local economic and social development fields such as education, medical care, fishing, and support for small and medium-sized enterprises, mainly for the poor in rural areas where economic and social development is delayed. aim.   |  |

Source: Ministry of Foreign Affairs HP Belize Country Data Collection 2017

**Table 4-2 National Development Cooperation Policy for Belize (September 2016)**

|   |  |
|---|--|
| <b>3. 3. Priority field (medium goal)</b> |  |
| (1) Disaster prevention / environment     | Promote measures for both adaptation and mitigation to the challenges of overcoming vulnerabilities to natural disasters, including climate change measures. We will implement human resource development support centered on waste management and construction of recycling systems for the sustainable development of the urban environment. |
| (2) Correcting disparities                | By supporting economic and social development, especially education and community development, in regions where development is delayed, we will work to develop human resources and expand employment opportunities. At that time, care should be taken to provide equal opportunities to women.   |

Source: Survey Team

##### (2) Survey on COVID-19 by development partners

We extracted sector names and specific quantitative figures that have a large impact on the country-specific analysis described in various reports of development partners. Reports from the World



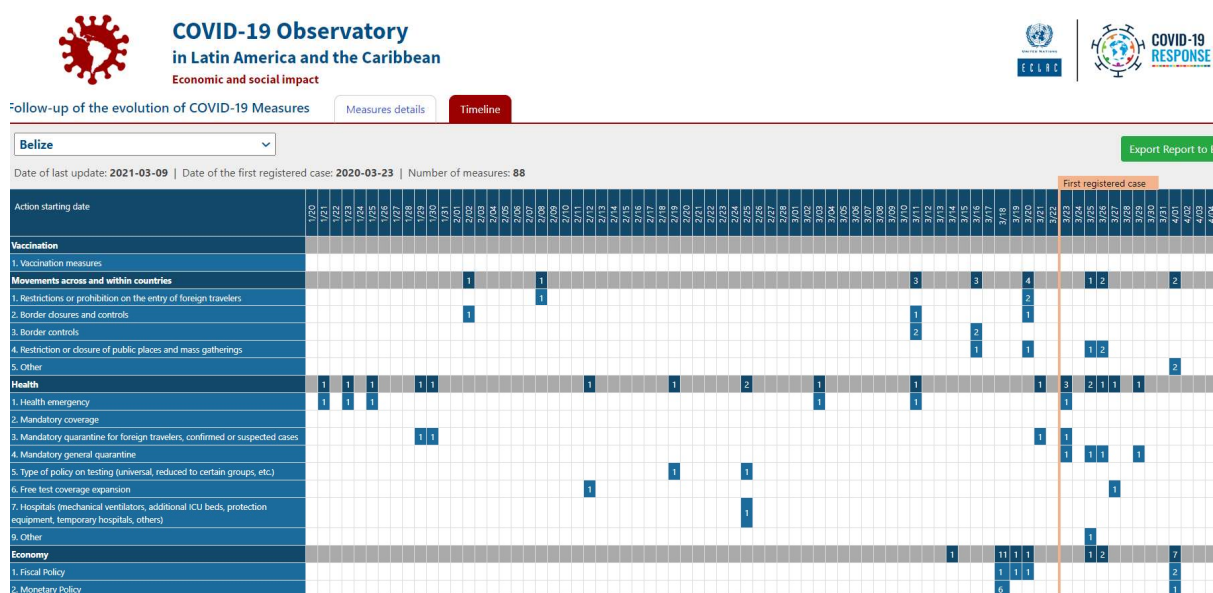
Bank, OECD, BCIE, SICA, and the Ministry of Economy, Trade and Industry of Japan suggest the importance of introducing digitalization and innovation (Fintech, Aggrotech, Autotech, etc.), and incorporate the survey results of these development partners. I arranged it accordingly.

World Bank: "Growth and Revitalization" 2021 Semi-Annual Economic Report (March 2021)

- ✓ OECD: COVID-19 in LAC, Regional socio-economic implications and policy priorities (December 2020)
- ✓ BCIE: Impacto Económico del COVID-19 (April 2020)
- ✓ SICA: Estimación del Impacto Económico del COVID-19 en Centroamérica y República Dominicana (April 2020)
- ✓ Ministry of Economy, Trade and Industry of Japan: "Economic and Industrial Policy Based on the Impact of the New Corona Virus" (June 2020), Accelerating Digitization and Onlineization, Gig Economy, Innovation in the Transition to a New Everyday Life 1) Medical care / health, 2) Digital: Infrastructure development premised on the arrival of a digital society, 3) Green: Response to climate change problems, Energy security, 4) Emphasizes resilience.

#### 4.1.5 Policies for COVID-19 measures taken by governments of each country

Various policies for COVID-19 taken by the government are described on the ECLAC homepage "COVID-19 Observatory" by country, time series, and field, and can be analyzed.



Source: <https://cepalstat-prod.cepal.org/forms/covid-countrysheet/index.html?table=2&country=BLZ>

In this survey, the 45 policies implemented in Belize posted on this website were classified by sector as much as possible.

#### 1) Infection spread and alleviation of aggravation and death

No material was available.

#### 2) Support for affected industries and people

**Table 4-3 Support for Affected Industries and People (Belize)**

| Various government policies (COVID-19 Observatory for LAC) |    |  |  |
|--|----|--|--|
| Socioeconomic policy                                       | 16 |  |  |
| Health care & nutrition                                    | 9  |  |  |
| Education  | 2  |  |  |
| Agriculture & rural development                            | 0  |  |  |

| Various government policies (COVID-19 Observatory for LAC) |  |    |  |
|--|--|----|--|
| Private sector   |  | 12 |  |
| Environment & disaster prevention                          |  | 0  |  |
| Governance and social security                             |  | 2  |  |
| DX and innovation  |  | 1  |  |
| Infrastructure & energy                                    |  | 0  |  |
| Tourism  |  | 0  |  |
| PPP  |  | 0  |  |
| Others (b)   |  | 3  |  |
| total  |  | 45 |  |

Source: Survey Team

### 3) Arrangement of various policies for COVID-19 taken by the government

COVID-19 Observatory for Latin America and Caribbean (ECLAC) organized by governments

**Table 4-4 Government-directed COVID-19 Policy Categories (Belize)**

#### Follow-up of the evolution of COVID-19 Measures

| Vaccination   | Economy  | Social protection   |
|---|--|---|
| 1. Vaccination measures   | 1. Fiscal Policy   | 1. Cash transfers (new transfers, increase in existing transfers, expansion of cash transfers to new recipients, early disbursement of transfers) |
| <b>Movements across and within countries</b>  | 2. Monetary Policy   | 2. Food transfers / In-kind transfers   |
| 1. Restrictions or prohibition on the entry of foreign travelers  | 3. Business policy   | 3. Guarantee of basic services  |
| 2. Border closures and controls   | 4. Restriction of economic activity (including shops and shopping centers)                             | <b>Education / schools</b>  |
| 3. Border controls  | 5. Price and quantity controls   | 1. Suspension of classes  |
| 4. Restriction or closure of public places and mass gatherings  | 6. Economic Stimulus (includes aggregate value of fiscal measures and separately of credit guarantees) | 2. Provision of tools for distance learning (online platforms, TV, radio, distance-learning materials)  |
| 5. Other  | 7. Regulation of the personal hygiene and cleaning products market                                     | 3. Maintenance of school feeding programme (indicating under which modalities)  |
| <b>Health</b>   | 8. Debt relief and suspension of credit payments (individuals, microentrepreneurs)                     | <b>Gender</b>   |
| 1. Health emergency   | 9. Other   | 1. Gender-based violence against women  |
| 2. Mandatory coverage   | <b>Labor</b>   | 2. Care economy   |
| 3. Mandatory quarantine for foreign travelers, confirmed or suspected cases                                   | 1. Labor Protection  | 3. Employment and income generation   |
| 4. Mandatory general quarantine   | 2. Elective work leave   | 4. Benefits, transfers and other social protection measures   |
| 5. Type of policy on testing (universal, reduced to certain groups, etc.)                                     | 3. Reduction of working hours  | 5. Women's participation in the digital era   |
| 6. Free test coverage expansion   | 4. Prohibition of dismissal from work  | 6. Other  |
| 7. Hospitals (mechanical ventilators, additional ICU beds, protection equipment, temporary hospitals, others) | 5. Other   |   |

Source: Survey Team

## 4.2 Macroeconomic analysis and selection of priority countries

### 4.2.1 Macroeconomic analysis

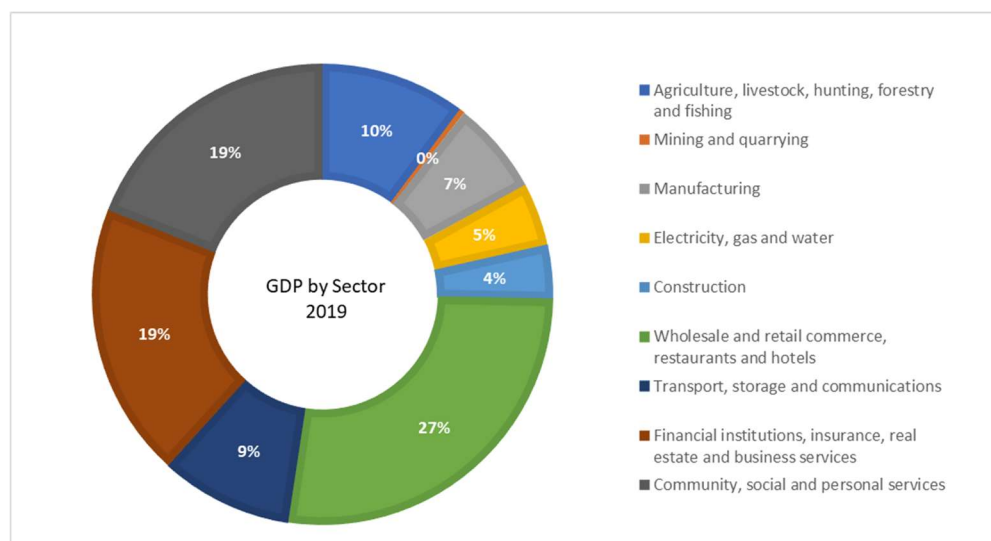
#### (1) Industrial composition

**Table 4-5 Industrial Composition (Belize)**

Table: Gross domestic product, by sector (En millones de dólares de Belice a precios constantes de 2000)

|  | 2011    | 2012    | 2013    | 2014    | 2015    | 2016    | 2017    | 2018    | 2019a/  | 2020 b/ |
|--|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Agriculture, livestock, hunting, forestry and fishing                | 326.8   | 347.4   | 368.4   | 377.4   | 330.2   | 258.7   | 283.9   | 273.0   | 264.7   |         |
| Mining and quarrying   | 11.9    | 13.0    | 12.2    | 10.5    | 10.1    | 11.0    | 8.7     | 7.9     | 10.0    |         |
| Manufacturing  | 291.6   | 269.5   | 217.3   | 201.0   | 171.5   | 158.6   | 160.6   | 164.5   | 171.6   |         |
| Electricity, gas and water   | 126.5   | 115.7   | 127.3   | 132.1   | 136.7   | 145.2   | 154.5   | 151.6   | 114.6   |         |
| Construction   | 51.5    | 54.3    | 63.8    | 68.0    | 80.7    | 90.2    | 86.8    | 81.2    | 98.4    |         |
| Wholesale and retail commerce, restaurants and hotels                | 461.1   | 485.1   | 513.5   | 532.8   | 560.8   | 644.1   | 684.8   | 712.4   | 705.8   |         |
| Transport, storage and communications                                | 203.3   | 201.5   | 204.1   | 204.3   | 206.7   | 223.8   | 228.6   | 240.2   | 242.2   |         |
| Financial institutions, insurance, real estate and business services | 430.7   | 425.5   | 411.5   | 429.1   | 479.4   | 480.9   | 478.8   | 460.4   | 502.7   |         |
| Community, social and personal services                              | 356.4   | 373.1   | 368.9   | 387.7   | 420.2   | 433.5   | 446.7   | 466.9   | 494.4   |         |
| Total  | 2,259.8 | 2,285.1 | 2,287.1 | 2,342.8 | 2,396.4 | 2,446.0 | 2,533.5 | 2,558.0 | 2,604.3 | 0.0     |

Source ECLAC



Source: Survey Team

## (2) Trends in major economic indicators

**Table 4-6 Trends in Major Economic Indicator (Belize)**

Table 1 BELIZE: MAIN ECONOMIC INDICATORS (Annual growth rates)

|  | 2011   | 2012   | 2013   | 2014   | 2015   | 2016   | 2017   | 2018   | 2019a/ | 2020 b/ |
|--|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------|
| Gross domestic product (Annual growth rates c/)                                      | 1.9    | 2.4    | 1.3    | 3.6    | 2.8    | 0.1    | 1.9    | 2.1    | -2.0   | -15.5   |
| Per capita gross domestic product (Annual growth rates c/)                           | -0.5   | 0.7    | -1.4   | 1.4    | 1.3    | -1.9   | -0.1   | 0.1    | -3.8   | -17.4   |
| Gross domestic product, by sector (Annual growth rates c/)                           |        |        |        |        |        |        |        |        |        |         |
| Agriculture, livestock, hunting, forestry and fishing                                | -4.3   | 6.3    | 6.0    | 2.4    | -12.5  | -21.7  | 9.8    | -3.9   | -0.7   |         |
| Mining and quarrying   | 3.7    | 8.9    | -5.9   | -14.1  | -3.6   | 8.3    | -20.5  | -9.8   | 1.9    |         |
| Manufacturing  | -2.6   | -7.6   | -19.4  | -7.5   | -14.7  | -7.5   | 1.2    | 2.4    | 1.9    |         |
| Electricity, gas and water   | -3.4   | -8.5   | 10.0   | 3.7    | 3.5    | 6.2    | 6.4    | -1.9   | -23.5  |         |
| Construction   | -4.0   | 5.4    | 17.6   | 6.6    | 18.7   | 11.7   | -3.8   | -6.5   | -18.4  |         |
| Wholesale and retail commerce, restaurants and hotels                                | 6.0    | 5.2    | 5.9    | 3.8    | 5.3    | 14.8   | 6.3    | 4.0    | 1.6    |         |
| Transport, storage and communications  | -1.7   | -0.9   | 1.3    | 0.1    | 1.2    | 8.3    | 2.2    | 5.1    | 4.1    |         |
| Financial institutions, insurance, real estate and business services                 | -0.2   | -1.2   | -3.3   | 4.3    | 11.7   | 0.3    | -0.4   | -3.8   | 6.7    |         |
| Community, social and personal services  | 0.3    | 4.7    | -1.1   | 5.1    | 8.4    | 3.2    | 3.0    | 4.5    | -29.4  |         |
| Balance of Payments (Millions of dollars)  |        |        |        |        |        |        |        |        |        |         |
| Current account balance  | -16.9  | -19.7  | -72.6  | -135.9 | -174.7 | -151.6 | -143.9 | -150.8 | -177.1 |         |
| Goods balance  | -170.9 | -196.5 | -267.8 | -336.8 | -423.4 | -432.3 | -391.1 | -466.0 | -506.3 | -575.2  |
| Exports, f.o.b.  | 603.7  | 621.6  | 608.1  | 588.7  | 537.9  | 442.8  | 457.2  | 451.2  | 462.2  | 211.8   |
| Imports, f.o.b.  | 774.6  | 818.1  | 875.9  | 925.5  | 961.3  | 875.1  | 848.3  | 917.2  | 968.5  | 787.0   |
| Services trade balance   | 168.4  | 221.3  | 240.3  | 269.7  | 274.4  | 293.1  | 300.3  | 382.1  | 403.8  |         |
| Income balance   | -98.2  | -120.2 | -118.0 | -142.7 | -95.5  | -110.9 | -125.3 | -145.3 | -158.3 |         |
| Net current transfers  | 83.7   | 75.7   | 73.0   | 74.0   | 69.7   | 98.4   | 72.1   | 78.2   | 83.9   |         |
| Capital and financial balance (Millions of dollars)                                  |        |        |        |        |        |        |        |        |        |         |
| Net foreign direct investment d/   | 94.4   | 193.3  | 91.6   | 138.4  | 58.6   | 42.3   | 24.2   | 121.3  | 100.8  |         |
| Other capital movements d/   | -59.8  | -120.9 | 98.3   | 82.4   | 12.4   | ...    | ...    | ...    | ...    |         |
| Foreign remittance from abroad for 2019 and 2020                                     | -63.5  | -47.8  | 71.9   | 78.0   | -24.4  | -19.5  | -45.8  | -12.3  | 9.3    |         |
| Microfinance dispatched and the sectors that received microfinance for 2019 and 2020 |        |        |        |        |        |        |        |        |        |         |

Source: Economic Survey of Latin America and the Caribbean 2020: Main conditioning factors of fiscal and monetary policies in the post-COVID-19 era

### 4.2.2 Impact analysis and identification of key sectors

#### (1) Impact assessment results for each sector by AHP analytic hierarchy process based on economic indicators

**Table 4-7 Results of Sector Impact Analysis by COVID-19 (Belize)**

| ECLAC category   | Changes around COVID-19 | Trends before COVID-19 | Total GDP ratio of the sector | comprehensive evaluation |   |
|--|-------------------------|------------------------|-------------------------------|--------------------------|---|
| Importance (weight)  | 0.4590                  | 0.0660                 | 0.0750                        |                          |   |
| Agriculture, livestock, hunting, forestry and fishing                | 9                       | 3                      | 6                             | 0.1674                   | 3 |
| Mining and quarrying   |                         | 2                      | 1                             | 0.005                    | 9 |
| Manufacturing  |                         | 1                      | 4                             | 0.008                    | 8 |
| Electricity, gas and water   |                         | 4                      | 3                             | 0.011                    | 7 |
| Construction   | 9                       | 8                      | 2                             | 0.1681                   | 2 |
| Wholesale and retail commerce, restaurants and hotels                | 9                       | 9                      | 9                             | 0.181                    | 1 |
| Transport, storage and communications                                |                         | 7                      | 5                             | 0.0186                   | 6 |
| Financial institutions, insurance, real estate and business services |                         | 6                      | 8                             | 0.022                    | 4 |
| Community, social and personal services                              |                         | 5                      | 7                             | 0.0190                   | 5 |

Source: Survey Team

#### 1) ECLAC Sector Classification Amendments to the Sector Classification

In line with the method described in the main volume, the Sector Classification is divided into the Vertical Sector and the Cross-Cutting Sector, the ECLAC classification sector is allocated to the Vertical Sector Classification, and the evaluation of various policies related to COVID-19 taken by the

government along with the results of the partner survey and the indicators of the national development cooperation policy, the ranking of priority sectors are calculated using the four indicators, which are described in the table below.

**Table 4-8 Ranking of Priority Sectors (Belize)**

|                                   | Economic Indicator Analysis | Government Policy on COVID-19 | Survey on COVID-19 by Development Partners | Country Development Cooperation Policy | Base Case |   | Priority |
|-----------------------------------|-----------------------------|-------------------------------|--|--|-----------|---|----------|
| Importance (weight)               | 0.6000                      | 0.2000                        | 0.1000                                     | 0.1000                                 |           |   |          |
| Social and Economic Policy        | 0.0000                      | 0.0711                        | 0.0000                                     | 0.0000                                 | 0.0711    |   | ○        |
| Health and Nutrition              | 0.0399                      | 0.0400                        | 0.0000                                     | 0.0000                                 | 0.0799    | 5 |          |
| Education                         | 0.0328                      | 0.0089                        | 0.0000                                     | 0.0250                                 | 0.0667    | 6 |          |
| Agriculture and Rural Development | 0.1018                      | 0.0000                        | 0.0125                                     | 0.0250                                 | 0.1393    | 3 | ○        |
| Manufacturing                     | 0.1405                      | 0.0533                        | 0.0125                                     | 0.0250                                 | 0.2313    | 2 | ○        |
| Environment/ Disaster Management  | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0250                                 | 0.0250    |   | ○        |
| Governance and Security           | 0.0000                      | 0.0089                        | 0.0000                                     | 0.0000                                 | 0.0089    |   | ○        |
| DX Innovation                     | 0.0000                      | 0.0044                        | 0.0375                                     | 0.0000                                 | 0.0419    |   | ○        |
| Infrastructure and Every          | 0.2251                      | 0.0000                        | 0.0125                                     | 0.0000                                 | 0.2376    | 1 | ○        |
| Tourism                           | 0.0600                      | 0.0000                        | 0.0250                                     | 0.0000                                 | 0.0850    | 4 |          |
| Public-Private Partnership        | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0000                                 | 0.0000    |   | ○        |

Source: Survey Team

## (2) Sensitivity analysis

### 1) Analysis case settings

Based on the above methodology, the following case settings were made.

**Table 4-9 Sensitivity Analysis Case-based Weighting Settings (Belize)**

|  | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|--|-----------|------------------------|------------------------|------------------------|
| Economic indicator analysis  | 0.6       | 0.6                    | 0.5                    | 0.5                    |
| Investigation and arrangement of various policies for COVID-19 taken by the government | 0.2       | 0.1                    | 0.1                    | 0.1                    |
| Development partner survey results   | 0.1       | 0.2                    | 0.2                    | 0.3                    |
| Country-specific development cooperation policy  | 0.1       | 0.1                    | 0.2                    | 0.1                    |

Source: Survey Team

## 2) Summary of sensitivity analysis

The results of each sensitivity analysis are as summarized below. Sensitivity analysis did not show much change, which was close to the result of the base case.

**Table 4-10 Summary of Sensitivity Analysis Results (Belize)**

|                                   | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|-----------------------------------|-----------|------------------------|------------------------|------------------------|
| Social and economic policy        |           |                        |                        |                        |
| Health care / nutrition           | 5         | 6                      | 6                      | 6                      |
| education                         | 6         | 5                      | 5                      | 5                      |
| Agriculture / rural development   | 3         | 3                      | 3                      | 3                      |
| Manufacturing industry            | 2         | 2                      | 1                      | 2                      |
| Environment / disaster prevention |           |                        |                        |                        |
| Governance and citizen security   |           |                        |                        |                        |
| DX / Innovation                   |           |                        |                        |                        |
| Infrastructure and Energy         | 1         | 1                      | 2                      | 1                      |
| sightseeing                       | 4         | 4                      | 4                      | 4                      |
| Public-private partnership        |           |                        |                        |                        |

Source: Survey Team

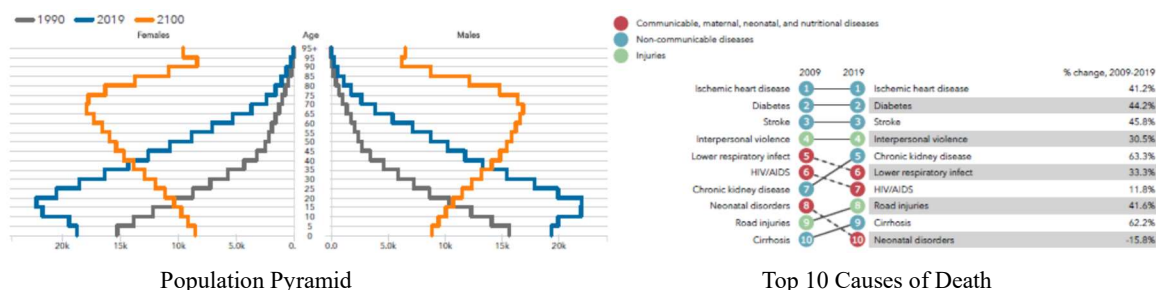
### **(3) Selection of priority sectors by country**

From the above results, 1) social / economic policy, 2) agriculture / rural development, 3) manufacturing industry, 4) environment / disaster prevention, 5) governance / citizen security, 6) DX / innovation, 7) infrastructure / energy, 8)Public-private partnership are selected as priority sectors.

## 4.3 Country-specific information by sector

### 4.3.1 Health care / nutrition

Overview: Proportion of NCDs death is relatively low. Population pyramid is still expansive, but fertility has been decreasing. Premature death under 70 is significant issue. Diabetes contributes around 50% of women's death. Murder and traffic accident trauma, as well as HIV are major causes of death among men.



| Demography                                      |   |   |   |                             |                                       |                                  |
|---|---|---|---|-----------------------------|---------------------------------------|----------------------------------|
| Population                                      | Urban population (%)                      | Urban population growth (%)             | Life Expectancy (years)                         |                             |                                       | Population $\geq 65$ (%)         |
|   |   |   | Male  | Female                      | Both                                  |                                  |
| 383,071   | 45.87                                     | 2.19                                    | 77.67   | 71.58                       | 74.50                                 | 4.74                             |
| Maternal, Newborn and Child Health              |   |   |   |                             |                                       |                                  |
| Total fertility rate                            | Neonatal mortality (per 1,000 livebirths) | Under 5mortality (per 1,000 livebirths) | Maternal mortality (per 100,000 livebirths)     | Antenatal care $\geq 4$ (%) | Immunization (1yr)                    |                                  |
| 2.31  | 8.60                                      | 13.00                                   | 36  | 93                          | DTP (%)                               | MCV1 (%)                         |
|   |   |   |   |                             | 96                                    | 97                               |
| Nutrition                                       |   |   | Health Finance                                  |                             |                                       |                                  |
| Under 5 Children                                |   | Adult overweight (%)                    | Current health expenditure per capita (USD PPP) |                             | Current health expenditure to GDP (%) | Out-of-pocket expenditure (%)    |
| Stunting (%)                                    | Overweight (%)                            | Male                                    | Female  | 473                         | 5.69                                  | 24                               |
| 15  | 7.3                                       | 32                                      | 30  |                             |                                       |                                  |
| Health Service Provision (per 1,000 population) |   |   | COVID-19 related Indicators as of January 2022  |                             |                                       |                                  |
| Hospital beds                                   | Doctors                                   | Nurses                                  | Total confirmed cases (per million)             | Total death (per million)   | Total number of tests (per 1,000)     | People completed vaccination (%) |
| 1.30  | 1.1                                       | 2.3                                     | 111,033.18                                      | 1,511.43                    | 1,034.16                              | 49.73                            |

Source: Graphs=Institute for Health Metrics and Evaluation, County Profile; Demography, Total fertility rate, Neonatal mortality, under-5 mortality, Health finance= World Development Indicators, the World Bank (Accessed on Aug 2021); Maternal mortality= UNICEF (Sep 2019); Antenatal care, Immunization, Nutrition, Health service provision,= OECD/The World Bank (2020), Health at a Glance: Latin America and the Caribbean 2020; COVID-19 related indicators= Our World in Data (Accessed on Jan 2022)

| Health                                  |   |
|---|---|
| Leadership/ Governance                  | Responsible Agency: Ministry of Health and Wellness, Social Security Board, National Health Insurance: Decentralized<br><a href="https://www.health.gov.bz/">https://www.health.gov.bz/</a> (A top page was under construction as of 5 Nov 2021.)<br>Major Relevant Policies: Health Sector Strategic Plan 2014-2024 (HSSP) |
| Service Providing System                | Public sector covers from primary to tertiary. The service access is generally good even in remote areas. The current health policy aims to establish integrated health service delivery network based on PHC model to provide continuum of care.   |
| Health Finance                          | Both national health insurance and government fund<br>Citizens can receive medical services in most of the health facilities, but other payment such as rewards are required.   |
| Human Resource for Health               | Maldistribution of specialized doctors and low retention rate are major issues.<br>Human Resource for Universal Health Strategic Plan 2019-2024: to improve quality and quantity of human resource for health, database has been developed and career path has been under review.   |
| IT/ Digital Health                      | Advanced web-based information management system has been developed and introduced. Private practitioners such as Dr. Kyle Habet ( <a href="https://drhabet.com/">https://drhabet.com/</a> ) provide telemedicine.  |
| Drugs/ Medical Equipment                | (No information)  |
| Priority                                | Primary health care (PHC), Noncommunicable diseases (diabetes, cardiovascular diseases), disorder in neonatal period  |
| Communicable Disease Emergency Response | Necessary action and responses are undertaken along with IHR.   |
| Major Development Partners              | PAHO/WHO, One UN  |



|                           |   |
|---------------------------|---|
| Nutrition                 |   |
| Institutional Arrangement | Ministry of Health and Wellness   |
| Major Relevant Policies   | Reduction of Chronic Malnutrition in Belize, 2011   |
| Human Resource for Health | Nutrition related degrees: Yes<br>Nutrition related subjects in pre-service education: Yes<br>Number of nutrition related professionals: 1.7 per 100,000 population |

Source: Survey Team with reference to WHO Country Cooperation Strategy for Belize at a glance, May 2018, Institute for Health Metrics and Evaluation, County Profile, Ministry of Health, Health Workforce Data Management Country Overview, 2019, WHO, Global atlas of medical devices, 2017, and WHO, Nutrition Landscape Information System (NLIS)

### 4.3.2 Education

| Overview  |   |  |  |                  |   |  |  |              |               |               |              |
|---|---|--|--|------------------|---|--|--|--------------|---------------|---------------|--------------|
| Number of children  | <table border="1"> <thead> <tr> <th>Education level</th> <th>Preschool</th> <th>primary</th> <th>Lower secondary</th> <th>Upper secondary</th> </tr> </thead> <tbody> <tr> <td>2019</td> <td>7,485 people</td> <td>50,388 people</td> <td>30,786 people</td> <td>9,855 people</td> </tr> </tbody> </table>  | Education level  | Preschool  | primary          | Lower secondary   | Upper secondary  | 2019   | 7,485 people | 50,388 people | 30,786 people | 9,855 people |
|   | Education level   | Preschool  | primary  | Lower secondary  | Upper secondary   |  |  |              |               |               |              |
| 2019  | 7,485 people  | 50,388 people  | 30,786 people  | 9,855 people     |   |  |  |              |               |               |              |
| <p>Source: Institute for Statistics (UIS), UNESCO Bureau of Statistics<br/>About 300 primary schools (about 3,000 teachers), 52 lower secondary and upper secondary schools (about 1,200 teachers), 6 vocational training schools (about 700 students, about 40 teachers). 80% of preschool, primary and secondary schools are privately owned.</p> |   |  |  |                  |   |  |  |              |               |               |              |
| Government authority  | Ministry of Education, Culture, Science and Technology  |  |  |                  |   |  |  |              |               |               |              |
| Education indicator   | Net enrollment rate: primary education 99.5%, lower secondary 98.6%, upper secondary 87.2% (2019)<br>Primary education completion rate 102.8% (2019), out-of-school children rate 0.5% (2019), public education budget GDP ratio 3.2% (2019)  |  |  |                  |   |  |  |              |               |               |              |
| Impact of COVID-19  |   |  |  |                  |   |  |  |              |               |               |              |
| School closure / reopening  | From March 11, 2020 to February 2, 2021, 70 days of complete closure and 83 days of partial closure. As of October 2021, classes are held in a hybrid style combined with remote and face-to-face classes. The school closed again in the second half of 2021 and reopened on January 10, 2022. Almost two years of face-to-face lessons have been lost.  |  |  |                  |   |  |  |              |               |               |              |
| COVID-19 measures   | According to a field survey, the learning curriculum was reduced by about 40% from 2020 to 2021. It focuses on the most basic and important units of learning curriculum.   |  |  |                  |   |  |  |              |               |               |              |
| Distance education  | <table border="1"> <thead> <tr> <th>Implementation status</th> <th>Access</th> <th>Teacher training</th> </tr> </thead> <tbody> <tr> <td> <p>The Ministry of Education uses the Ministry of Education website launched in partnership with SMART and a learning platform that utilizes Google Classroom to deliver classes to children in grades 1 to 6 every day. In addition, classes were distributed via radio broadcasting (Monday to Friday) and television broadcasting (2 to 3 times a week). Printed materials are also distributed to students who do not have access to them via a special edition newspaper issued every two weeks. Parents also receive a learning package at school every two weeks. Distance Education Readiness Index Level 2 published by UNICEF "Some children / students can benefit from distance education, but due to several factors, the majority of the country does not have access to distance education."<br/>Face-to-face lessons reopened in January 2022, but only 25-50% of students are attending school, and teachers are developing and distributing learning packages for students who cannot come to school. Therefore, it is a double task for teachers (by interview survey).<br/>Higher Education (University of Belize) still offers 100% online classes as of January 2022. Due to the influence of COVID-19, more than 20% of students dropped out due to financial reasons (by interview survey).</p> </td> <td> <p>Many children have difficulty on online learning because the classrooms in rural schools do not have an internet environment, no culture or experience of online learning, and internet connectivity is very limited in rural areas. Schools in urban areas have almost an internet environment. About 5% of children (especially boys in secondary education) dropped out (by interview survey).</p> </td> <td> <p>Set up a platform called Teacher Learning Institute supported by UNICEF and conducted online teacher training nationwide. Providing reading comprehension materials and laptop PCs.</p> </td> </tr> </tbody> </table> | Implementation status  | Access   | Teacher training | <p>The Ministry of Education uses the Ministry of Education website launched in partnership with SMART and a learning platform that utilizes Google Classroom to deliver classes to children in grades 1 to 6 every day. In addition, classes were distributed via radio broadcasting (Monday to Friday) and television broadcasting (2 to 3 times a week). Printed materials are also distributed to students who do not have access to them via a special edition newspaper issued every two weeks. Parents also receive a learning package at school every two weeks. Distance Education Readiness Index Level 2 published by UNICEF "Some children / students can benefit from distance education, but due to several factors, the majority of the country does not have access to distance education."<br/>Face-to-face lessons reopened in January 2022, but only 25-50% of students are attending school, and teachers are developing and distributing learning packages for students who cannot come to school. Therefore, it is a double task for teachers (by interview survey).<br/>Higher Education (University of Belize) still offers 100% online classes as of January 2022. Due to the influence of COVID-19, more than 20% of students dropped out due to financial reasons (by interview survey).</p> | <p>Many children have difficulty on online learning because the classrooms in rural schools do not have an internet environment, no culture or experience of online learning, and internet connectivity is very limited in rural areas. Schools in urban areas have almost an internet environment. About 5% of children (especially boys in secondary education) dropped out (by interview survey).</p> | <p>Set up a platform called Teacher Learning Institute supported by UNICEF and conducted online teacher training nationwide. Providing reading comprehension materials and laptop PCs.</p> |              |               |               |              |
|   | Implementation status   | Access   | Teacher training   |                  |   |  |  |              |               |               |              |
|   | <p>The Ministry of Education uses the Ministry of Education website launched in partnership with SMART and a learning platform that utilizes Google Classroom to deliver classes to children in grades 1 to 6 every day. In addition, classes were distributed via radio broadcasting (Monday to Friday) and television broadcasting (2 to 3 times a week). Printed materials are also distributed to students who do not have access to them via a special edition newspaper issued every two weeks. Parents also receive a learning package at school every two weeks. Distance Education Readiness Index Level 2 published by UNICEF "Some children / students can benefit from distance education, but due to several factors, the majority of the country does not have access to distance education."<br/>Face-to-face lessons reopened in January 2022, but only 25-50% of students are attending school, and teachers are developing and distributing learning packages for students who cannot come to school. Therefore, it is a double task for teachers (by interview survey).<br/>Higher Education (University of Belize) still offers 100% online classes as of January 2022. Due to the influence of COVID-19, more than 20% of students dropped out due to financial reasons (by interview survey).</p>   | <p>Many children have difficulty on online learning because the classrooms in rural schools do not have an internet environment, no culture or experience of online learning, and internet connectivity is very limited in rural areas. Schools in urban areas have almost an internet environment. About 5% of children (especially boys in secondary education) dropped out (by interview survey).</p> | <p>Set up a platform called Teacher Learning Institute supported by UNICEF and conducted online teacher training nationwide. Providing reading comprehension materials and laptop PCs.</p> |                  |   |  |  |              |               |               |              |
| <p>Infection control measures</p>   | <p>In October 2021, the second hygiene management protocol for school reopening was created, and infection prevention measures for school reopening are being implemented, such as installing a hand-washing corner in each classroom and installing a sanitizer. Schools are allowed to open if they prepare a good environment.</p>   |  |  |                  |   |  |  |              |               |               |              |
| <p>Facility maintenance</p>   | <p>According to UNICEF, one-third of schools do not have enough basic water facilities and toilets. According to a field survey, schools in urban areas have a good environment, such as setting up hand-washing facilities in each classroom, but it is not enough in rural areas in the south and north.</p>  |  |  |                  |   |  |  |              |               |               |              |



|                                       |   |
|---------------------------------------|---|
| School lunch / nutrition              | School lunch nutrition program reduced by 50%   |
| Countermeasures for vulnerable people | A large and sudden influx of immigrants from Central American countries is serious. Language barriers and academic disparities are challenges for inclusive education for immigrants.   |
| Support for donors, etc.              | Inter-American Development Bank (IDB) loan: \$ 12.5 million, 5 years<br>Supporting the school community to tackle pandemic challenges. Support for the transition to a hybrid education model of distance education and face-to-face education in primary and secondary schools, and support for immigrant students through multicultural education. Provided ICT educational equipment to 9,700 students and 100 teachers to promote hybrid education.<br>UNICEF: Distribution of emergency child development kits, distribution of printed teaching material packages for distance learning, hand washing enlightenment by TV, radio and printed materials, distribution of hygiene education packages to 50,000 children for school reopening, COVID-19 Food support program (32,000 households), TV for continuing education in COVID-19 disaster, provision of radio program ("In It Together"), impact survey on children's mental health due to school closure and psychological support for children at home Enlightenment activities for parents |

Source: Survey Team

### 4.3.3 Agriculture / rural development

|   |  |         |         |         |         |         |
|---|--|---------|---------|---------|---------|---------|
| Urban / rural population ratio                    | 45.7% / 54.3% (FAOSTAT 2018)   |         |         |         |         |         |
| Agricultural land area                            | 172,000 ha (FAOSTAT 2019) 1)   |         |         |         |         |         |
| Agricultural sector employment                    | 17.3% of total employment (FAOSTAT 2017) 2)  |         |         |         |         |         |
| Agricultural GDP                                  | 9.1% of total GDP (World Bank 2020)  |         |         |         |         |         |
| Of the agricultural sector Value added amount     | \$ 171,305.26 thousand dollars (including forestry) (World Bank 2020) 3)   |         |         |         |         |         |
| Agricultural sector expenditure ratio             | Ratio of agricultural fiscal expenditure to national budget (%) 4)   |         |         |         |         |         |
|   | 2018   | 2019    | 2020    |         |         |         |
|   | 1.37   | 1.21    | 1.32    |         |         |         |
| Agricultural sector import / export balance       | Trade Balance (USD1,000 FAOSTAT) 5)  |         |         |         |         |         |
|   |  | 2015    | 2016    | 2017    | 2018    | 2019    |
|   | export   | 200,291 | 165,344 | 191,118 | 158,748 | 174,055 |
|   | Import   | 177,140 | 165,681 | 168,388 | 193,033 | 199,309 |
|   | Balance of payments  | 23,151  | -337    | 22,730  | -34,285 | -25,254 |
| Agricultural development Policy / plan / strategy | <p>In "National Agriculture and Food Policy 2015-20306)", "(1) Sustainable Productivity / Competitiveness", "(2) Market Development", "(3) National Food and Nutrition Security and Improvement of Rural Livelihood", " "(4) Sustainable agriculture and risk management" and "(5) Governance, accountability and transparency, and coordination" are listed as the five pillars. Pillars (1) and (2) include establishing markets to ensure productivity and competitiveness in this sector, adopting innovative technologies, and improving infrastructure. For example, (3) is to reduce food imports by improving productivity and productivity by promoting local production for local consumption, and at the same time providing income opportunities for rural residents including women and young people. (4) focuses on "environmentally friendly production systems," "natural resource protection," and "risk management mechanisms such as crop insurance" in order to respond to climate change. Finally (5), governance will be the pillar of "cross-sectoral response", which is an issue for Belize's agriculture and food sector. The policy is divided into three medium-term plans every five years, and each plan is evaluated and the results are reflected in the next plan.</p> <p>The Caribbean Agricultural Research and Development Institute (CARDI), of which Berry's is a member, is a research and development institute that aims to improve the competitiveness and sustainability of the regional agricultural sector and was established in 1974 by the 12 member countries of CARICOM. Was done. To transform the agricultural sector into a modernized, competitive, innovative and resilient one, CARDI has created a five-year roadmap, Strategic Plan 2018-20227). CARDI divides its member countries into three groups based on the economic structure of each country, and Belize belongs to the first group. This group has a large agricultural land, the country has the ability of research and development, and plays an important role in the food production of the region. The challenge for this group is to promote the processing of high-yielding agricultural products.</p> |         |         |         |         |         |
| Impact of COVID-19                                | COVID-19 measures such as border closure led to the disruption of the agricultural supply chain, and the decline in the tourism industry and the turmoil in the export market led to a decline in  |         |         |         |         |         |

|        |  |
|--------|--|
|        | production activities and a chain of income declines. The Belize government received \$ 8 million in financial support from the World Bank to strengthen its response <sup>8</sup> ), supported the agricultural sector, and benefited more than 8,700 agricultural households. Belize's agricultural industry is export-oriented, and in fact many of its exports are agricultural products. According to an analysis by the Inter-American Development Bank (IDB) <sup>9</sup> , in order for Belize to recover from the COVID-19 recession and achieve further sustainable growth, it will expand its products and markets (currently, export agricultural products and export destinations are limited). The priority is to increase the competitiveness of the tourism and agriculture sectors and revitalize exports.  |
| source | 1) FAOSTAT-Land, Input and Sustainability-Land Use-Area-Agriculture ( <a href="https://www.fao.org/faostat/en/#data/RL">https://www.fao.org/faostat/en/#data/RL</a> )<br>2) FAOSTAT- Share of employment in agriculture (% of total employment) & Share of female employment in agriculture (% of employment in agriculture) ( <a href="https://www.fao.org/faostat/en/#data/OE">https://www.fao.org/faostat/en/#data/OE</a> )<br>3) Agriculture, forestry, and fishing, value added (constant 2015 US \$) --Latin America & Caribbean ( <a href="https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart">https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart</a> )<br>4) FAOSTAT-Government Expenditure-Share of Total Expenditure-Central Government ( <a href="https://www.fao.org/faostat/en/#data/IG">https://www.fao.org/faostat/en/#data/IG</a> )<br>5) FAOSTAT-Trade-Crops and livestock products-Import / Export Value-Agricultural Products ( <a href="https://www.fao.org/faostat/en/#data/TCL">https://www.fao.org/faostat/en/#data/TCL</a> )<br>6) National Agricultural and Food Policy of Belize 2015-2030 ( <a href="http://faolex.fao.org/docs/pdf/blz171041.pdf">http://faolex.fao.org/docs/pdf/blz171041.pdf</a> )<br>7) CARDI STRATEGIC PLAN 2018-2022 ( <a href="http://www.cardi.org/wp-content/uploads/downloads/2018/05/CARDI-Strategic-Plan-2018-to-2022-Final.pdf">http://www.cardi.org/wp-content/uploads/downloads/2018/05/CARDI-Strategic-Plan-2018-to-2022-Final.pdf</a> )<br>8) World Bank Provides US \$ 8 Million to Strengthen Agriculture and Food Security in Belize ( <a href="https://www.worldbank.org/en/news/press-release/2020/08/27/world-bank-strengthens-agriculture-food-security-belize">https://www.worldbank.org/en/news/press-release/2020/08/27/world-bank-strengthens-agriculture-food-security-belize</a> )<br>9) Developing a Sustainable, Resilient and Inclusive Belize ( <a href="https://publications.iadb.org/publications/english/document/BIDeconomics-Belize-Developing-a-Sustainable-Resilient-and-Inclusive-Belize.pdf">https://publications.iadb.org/publications/english/document/BIDeconomics-Belize-Developing-a-Sustainable-Resilient-and-Inclusive-Belize.pdf</a> ) |

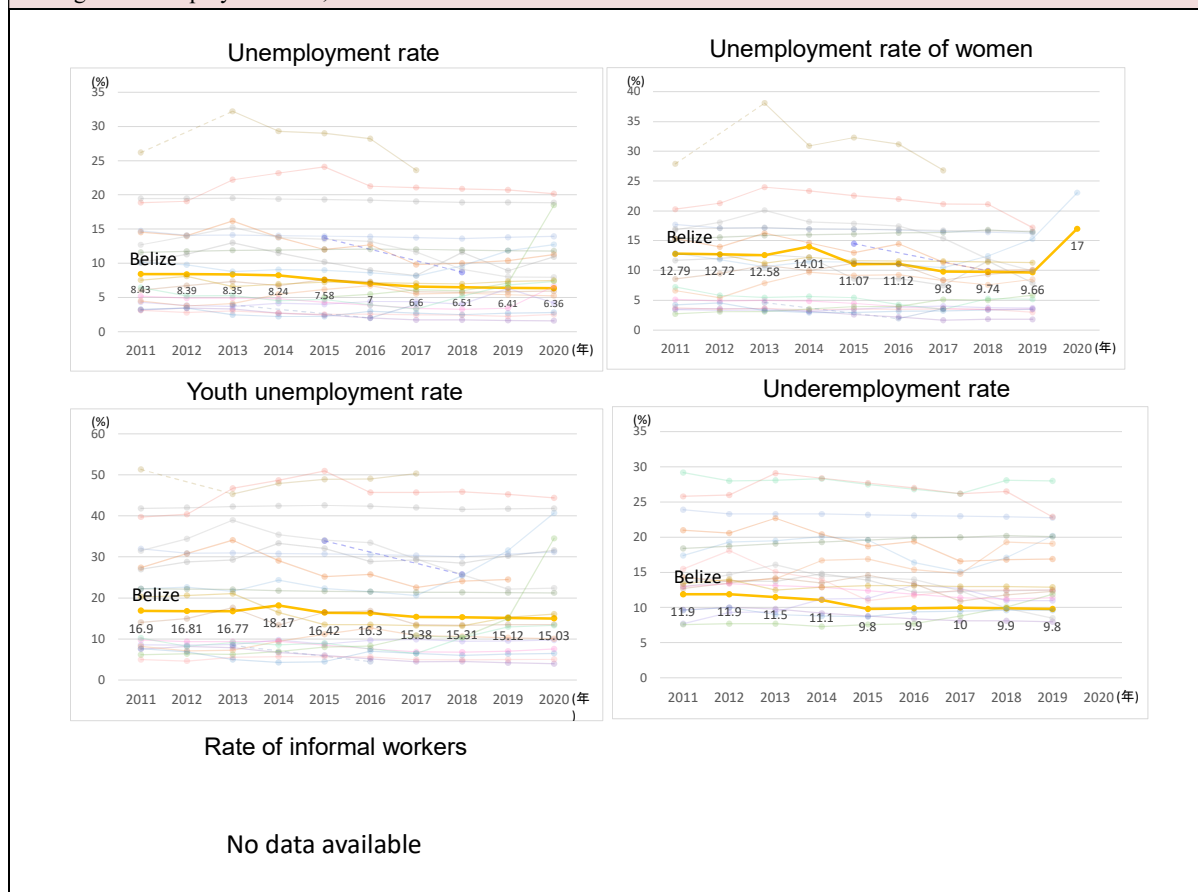
#### 4.3.4 Private sector

Belize's economy is small (18th). GDP per capita is small (18th) and the minimum wage is low (13th). The unemployment rate is not too high compared to GDP and GDP per capita, ranked in the middle group of the region. The underemployment rate is low (4th), but there is no data on the informal worker rate.

|              | Index                      | Value  | Ranking                 | Year | Source             |
|--------------|----------------------------|--------|-------------------------|------|--------------------|
| Productivity | GDP per capita (USD)       | 4,436  | 18 (Among 22 countries) | 2020 | World Bank         |
|              | GDP per worker (USD)       | 16,707 | 15 (Among 18 countries) | 2019 | World Bank         |
| Employment   | Minimum wage (USD / month) | 257    | 13 (Among 23 countries) | 2019 | ILO                |
|              | Unemployment rate          | 6.41   | 9 (Among 22 countries)  | 2019 | Statista           |
|              | Female unemployment rate   | 9.66   | 11 (Among 22 countries) | 2019 | The Global Economy |
|              | Youth unemployment rate    | 15.12  | 11 (Among 22 countries) | 2019 | Statista           |
|              | Underemployment rate       | 9.8    | 4 (Among 18 countries)  | 2019 | ILO                |
|              | Informal worker rate       | —      | — (Among 12 countries)  | —    | —                  |

Source: Described in the table

Changes in unemployment rate, etc.



Source: World Bank, ILO, The Global Economy, etc.

### 4.3.5 Environment / Disaster Management

|                     | item   | data  | remarks                           |
|---------------------|--|---|-----------------------------------|
| Environment         | Environmental agency                                     | MINISTRY OF FOOD AND AGRICULTURE AND IMMIGRATION AND MINISTRY OF FISHERIES, FORESTRY, THE ENVIRONMENT AND SUSTAINABLE DEVELOPMENT |                                   |
|                     | Waste-related organizations                              | Belize Solid Waste and Management Authority   |                                   |
|                     | Environmental Budget (USD)                               | 2019: 2,502,942<br>2020: 2,498,520<br>2021: 2,244,063<br>Three-year average: 2,415,175  | Average: 13th out of 23 countries |
|                     | Environmental budget per capita (2019-2021 average, USD) | 6.1.  | 10th out of 23 countries          |
|                     | Budget ratio to national budget (2019)                   | 0.46%   | 7th out of 23 countries           |
|                     | Donor support status                                     | 8 cases   | As of May 2021                    |
|                     | Renewable energy power generation (GWh) (2019)           | 248   | IRENA, 2021                       |
|                     | Geothermal power generation capacity (MWe)               | 2020: 0<br>2025 Forecast: 0   | WGC, 2020                         |
| Disaster Management | Disaster prevention organization                         | Ministry of Sustainable Development, Climate change and disaster risk management  |                                   |
|                     | Donor support status                                     | 6   | As of May 2021                    |
|                     | Number of natural disasters (2010-2020)                  | 1   | Major disasters: floods           |
|                     | Number of victims (persons) per 100,000 population       | 5,025 people  | 10th out of 23 countries          |
|                     | COVID-19 impact  | (investigating)   |                                   |

Source: Survey Team

### 4.3.6 Governance and citizen security

| Item  | Overview  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
|---|---|-----------|----------------------------|------|----------------------------|--------------------------|-----------------------------|------|-----|------|-----|------|-----|--------|------|-----|------|-----|------|-----|---|-----------------------------|------|-----|------|-----|------|-----|--------|------|-----|------|-----|------|-----|--------------------------|-----------------------------|------|-----|------|-----|------|-----|--------|------|-----|------|-----|------|-----|--------------------|-----------------------------|------|-----|------|-----|------|-----|--------|------|-----|------|-----|------|-----|-------------|-----------------------------|------|-----|------|-----|------|-----|--------|------|-----|------|-----|------|-----|-----------------------|-----------------------------|------|-----|------|-----|------|-----|--------|------|-----|------|-----|------|
| Political system                                      | Parliamentary democracy under the constitutional monarchy belonging to the Commonwealth of Nations  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
| Election system                                       | Free and competitive regular elections are held. The monarch is hereditary. The governor-general appointed by the monarch appoints the head of a majority party or coalition government as prime minister after the legislative elections.  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
| Legislative system                                    | Bicameral National Assembly   |           |                            |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
| Most recent / next legislative election               | Senate: November 11, 2020 (Next term is scheduled for November 2025)<br>House of Representatives: November 11, 2020 (Next term is scheduled for November 2025)  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
| Judicial system<br>Appointment and term of judge      | The head of the Court of Appeals and the judge are appointed by the governor-general in consultation with the leader of the opposition party of the National Assembly based on the advice of the prime minister. The Supreme Court is appointed by the governor-general based on the advice of the Prime Minister and the leader of the opposition party in the National Assembly.  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
| Political stability                                   | Stable for the past 20 years  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
| “Worldwide Governance Indicators”                     | As for governance indicators, "governance effectiveness" and "rule of law" are worse than the regional average, and other indicators are almost average.  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
|   | <table border="1"> <caption>Worldwide Governance Indicators (WGI) Data (Estimated Percentile Rank)</caption> <thead> <tr> <th>Indicator</th> <th>Country</th> <th>Year</th> <th>Percentile Rank (0 to 100)</th> </tr> </thead> <tbody> <tr> <td rowspan="6">Voice and Accountability</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~60</td> </tr> <tr> <td>2019</td> <td>~60</td> </tr> <tr> <td>2020</td> <td>~60</td> </tr> <tr> <td rowspan="3">Belize</td> <td>2010</td> <td>~65</td> </tr> <tr> <td>2019</td> <td>~65</td> </tr> <tr> <td>2020</td> <td>~65</td> </tr> <tr> <td rowspan="6">Political Stability and Absence of Violence/Terrorism</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Belize</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="6">Government Effectiveness</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Belize</td> <td>2010</td> <td>~45</td> </tr> <tr> <td>2019</td> <td>~45</td> </tr> <tr> <td>2020</td> <td>~45</td> </tr> <tr> <td rowspan="6">Regulatory Quality</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Belize</td> <td>2010</td> <td>~45</td> </tr> <tr> <td>2019</td> <td>~45</td> </tr> <tr> <td>2020</td> <td>~45</td> </tr> <tr> <td rowspan="6">Rule of Law</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Belize</td> <td>2010</td> <td>~45</td> </tr> <tr> <td>2019</td> <td>~45</td> </tr> <tr> <td>2020</td> <td>~45</td> </tr> <tr> <td rowspan="6">Control of Corruption</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Belize</td> <td>2010</td> <td>~45</td> </tr> <tr> <td>2019</td> <td>~45</td> </tr> <tr> <td>2020</td> <td>~45</td> </tr> </tbody> </table> | Indicator | Country                    | Year | Percentile Rank (0 to 100) | Voice and Accountability | * Latin America & Caribbean | 2010 | ~60 | 2019 | ~60 | 2020 | ~60 | Belize | 2010 | ~65 | 2019 | ~65 | 2020 | ~65 | Political Stability and Absence of Violence/Terrorism | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Belize | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Government Effectiveness | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Belize | 2010 | ~45 | 2019 | ~45 | 2020 | ~45 | Regulatory Quality | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Belize | 2010 | ~45 | 2019 | ~45 | 2020 | ~45 | Rule of Law | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Belize | 2010 | ~45 | 2019 | ~45 | 2020 | ~45 | Control of Corruption | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Belize | 2010 | ~45 | 2019 | ~45 | 2020 |
| Indicator   | Country   | Year      | Percentile Rank (0 to 100) |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
| Voice and Accountability                              | * Latin America & Caribbean   | 2010      | ~60                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
|   |   | 2019      | ~60                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
|   |   | 2020      | ~60                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
|   | Belize  | 2010      | ~65                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
|   |   | 2019      | ~65                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
|   |   | 2020      | ~65                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
| Political Stability and Absence of Violence/Terrorism | * Latin America & Caribbean   | 2010      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
|   |   | 2019      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
|   |   | 2020      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
|   | Belize  | 2010      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
|   |   | 2019      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
|   |   | 2020      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
| Government Effectiveness                              | * Latin America & Caribbean   | 2010      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
|   |   | 2019      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
|   |   | 2020      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
|   | Belize  | 2010      | ~45                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
|   |   | 2019      | ~45                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
|   |   | 2020      | ~45                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
| Regulatory Quality                                    | * Latin America & Caribbean   | 2010      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
|   |   | 2019      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
|   |   | 2020      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
|   | Belize  | 2010      | ~45                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
|   |   | 2019      | ~45                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
|   |   | 2020      | ~45                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
| Rule of Law   | * Latin America & Caribbean   | 2010      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
|   |   | 2019      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
|   |   | 2020      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
|   | Belize  | 2010      | ~45                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
|   |   | 2019      | ~45                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
|   |   | 2020      | ~45                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
| Control of Corruption                                 | * Latin America & Caribbean   | 2010      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
|   |   | 2019      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
|   |   | 2020      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
|   | Belize  | 2010      | ~45                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
|   |   | 2019      | ~45                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
|   |   | 2020      | ~45                        |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
| Global freedom status                                 | 87/1000 points (citizen rights: 34/40 points, political rights: 53/60 points)<br>Classified as "free country" (Freedom House 2021)  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
| Corruption Perception Index (CPI)                     | No information about CPI. According to WGI, the level of "corruption control" is poor.  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
| E-government development index                        | It is lower than the average level in the region, especially behind the development of online service indicators and communication infrastructure. As of 2018, no national ID has been issued (social security number, tax ID, GST number have been issued).  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
| Rule of law   | According to WGI, both the level of "quality of regulation" and the level of "rule of law" are very poor compared to the regional average.  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |
| Citizen Security                                      | The homicide rate is the second highest in Central America after Mexico. The homicide rate in 2017 was 38.7 / 100,000 (26.5 in Central America and 6 in the world in the same year) (UNODC 2021). The latest data is 24.33 / 100,000 (Belize Police Department 2020).   |           |                            |      |                            |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |        |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |        |      |     |      |     |      |

Source: Survey Team

### 4.3.7 DX / Innovation

|  |  |  |
|--|--|--|
| <p>Basic indicators and statistics</p>   | <p>E-government ranking <sup>1)</sup>: 136th</p> <p>Mobile connection index <sup>2)</sup>: 57.1</p> <p>Network Infrastructure Index: 65.6</p> <p>Internet user rate 47.1</p> <p>Mobile connection rate 94.0</p> <p>Fixed broadband rate 7.6</p> <p>Increasing rate of Internet users 1.8 (2021/2020)</p> | <p>Radar chart of e-government ranking</p> |
| <p><b>Communication network</b></p>  |  |  |
| <p>Belize's fixed-line penetration rate<sup>3)</sup>, which was 15.1% in 1999, was 4.7% (2019), below the average of 15.2% (2019) in Latin America and the Caribbean. The penetration rate of mobile phones instead of fixed-line phones<sup>4)</sup> has been increasing in recent years, but it is 65.3% (2019), which is lower than the regional average of 101.5% (2019). The fixed broadband penetration rate <sup>5)</sup> is also 7.6% (2019), which is lower than the regional average of 14.0% (2019). The average public investment rate of the telecommunications sector in terms of GDP for the five years from 2015 is 1.7% <sup>6)</sup>, which is the Latin American regional average of 0.15% <sup>6)</sup>, while aggressive investment policies are implemented. I can see that it is. However, the total investment amount is 156,290 (USD million) <sup>6)</sup>, which reflects the economic scale of Belize (GDP 1,907 USD million vs. Latin American average 127,451 USD million <sup>6)</sup>), and has a legacy of lack of investment in communication services. It has become.</p> <p>In 1997, he was committed to telecommunications negotiations with the WTO<sup>7)</sup>, which consisted of online information and database searches, electronic data interchange, and limited liberalization of online information or data. Belize, a British colony, shares the same background with the British company C &amp; W, which, like other Caribbean countries, monopolized licenses in the telecommunications sector.</p> <p>In 1987, BTL<sup>8)</sup> was established as a merger of BTM and C &amp; W of the regulatory agency, but the growth of the entire sector was delayed because it had monopolized the market for 15 years until 2002.</p> <p>Although the market was liberalized in 2003, BTL continues to dominate fixed-line services and is a major provider of mobile and broadband services.</p> <p>As a sector growth strategy, it has formed a technical alliance with Huawei Technologies and DigiCell, and officially launched the 4G LTE Advanced Network in 2016 <sup>8)</sup>. In 2017, a fiber-based broadband project, and in 2018, BTL's aim to transform itself into an effective and competitive operator with a focus on more commercial-oriented, cheaper pricing and customer retention. Introduced the mobile brand Digi <sup>8)</sup>. It has also invested \$ 93 million to provide high-speed broadband to 80% of the country's homes <sup>8)</sup>.</p> |  |  |
| <p><b>National Strategy for Digital Transformation</b></p>   |  |  |
| <p>National Development E-Government Policy 2015-2018<sup>9)</sup> is a better public service for the people, such as birth certificate, permit and license, passport and visa application, income declaration, tax payment, etc. by utilizing ICT as e-government. The purpose is to be able to provide services.</p> <p>The Central Information Technology Bureau <sup>10)</sup> (CITO) is in charge of international partnership alliances, policies and project implementation for that purpose, and the Government of the Republic of China (Taiwan) through a bilateral agreement to promote cooperation in the ICT field. Is affiliated with <sup>11)</sup>.</p> <p>Key initiatives include national e-Government policy, strategy and action planning design, and roadmap development for Belize's e-Government platform development <sup>12)</sup>.</p> <p>In addition, efficiency in service provision through integration of income tax department and business tax department into tax services, automation of operation process led by Ministry of Finance, launch of user-oriented website of Ministry of Natural Resources, improvement of communication tools, etc. It is said to improve responsiveness <sup>13)</sup>.</p>   |  |  |
| <p><b>Characteristic efforts</b></p>   |  |  |
| <p>Belize is not a member of OGP <sup>14)</sup>, but is working on the "Access to Health Services in Rural Areas" project with the support of the Organization of American States (OAS) and The Trust for the Americas <sup>15)</sup> (NPO). Health agencies need to address key issues such as primary care situations in rural areas and gender-based violence, especially in the context of COVID-19. Keeping resources and data optimized for digital reporting is very meaningful for improving services, especially for institutions working on the community health agenda. The ability to exchange data and information with user-oriented digital tools is important for the rapid and accurate decision-making of relevant ministries and agencies<sup>16)</sup>.</p>  |  |  |
| <p><b>source</b></p>   |  |  |
| <ol style="list-style-type: none"> <li>1. E-Gov-Index: a composite indicator that consists of three indexes (Online Service Index, Telecommunication Infrastructure Index and Human Capital Index), which are equally weighted. It ranges from 0 to 1, with 1 being the most developed.</li> <li>2. Mobile Connectivity Index: an input index developed by GSMA to measure the performance against the four key enablers of mobile internet adoption – infrastructure, affordability, consumer readiness and content. (<a href="https://www.gsma.com/mobileforddevelopment/wp-content/uploads/2016/06/Mobile-Connectivity-Launch-Report.pdf">https://www.gsma.com/mobileforddevelopment/wp-content/uploads/2016/06/Mobile-Connectivity-Launch-Report.pdf</a>)</li> <li>3. Fixed telephone subscriptions (per 100 people) --Latin America &amp; Caribbean, Belize <a href="https://data.worldbank.org/indicator/IT.MLT.MAIN.P2?locations=ZJ-BZ">https://data.worldbank.org/indicator/IT.MLT.MAIN.P2?locations=ZJ-BZ</a></li> <li>4. Mobile cellular subscriptions (per 100 people) --Latin America &amp; Caribbean, Belize <a href="https://data.worldbank.org/indicator/IT.CEL.SETS.P2?locations=ZJ-BZ">https://data.worldbank.org/indicator/IT.CEL.SETS.P2?locations=ZJ-BZ</a></li> <li>5. Fixed broadband subscriptions (per 100 people) --Latin America &amp; Caribbean, Belize <a href="https://data.worldbank.org/indicator/IT.NET.BBND.P2?locations=ZJ-BZ">https://data.worldbank.org/indicator/IT.NET.BBND.P2?locations=ZJ-BZ</a></li> <li>6. <a href="http://44.192.3.155/wp-content/uploads/2021/03/INFRAALATAM_20210331.xlsx">http://44.192.3.155/wp-content/uploads/2021/03/INFRAALATAM_20210331.xlsx</a></li> <li>7. Services Commitments: Case Studies from Belize and Costa Rica</li> </ol>  |  |  |

|     |  |
|-----|--|
|     | <a href="https://www.wto.org/english/res_e/booksp_e/casestudies_e/case5_e.htm">https://www.wto.org/english/res_e/booksp_e/casestudies_e/case5_e.htm</a>  |
| 8.  | <a href="https://www.livedigi.com/about/our-history">https://www.livedigi.com/about/our-history</a>  |
| 9.  | National Development E-Government Policy 2015-2018<br><a href="https://cito.gov.bz/wp-content/uploads/2020/11/BelizeNatleGovStrategyWorkPlan2015.pdf">https://cito.gov.bz/wp-content/uploads/2020/11/BelizeNatleGovStrategyWorkPlan2015.pdf</a>  |
| 10. | Central Information Technology Office<br><a href="https://cito.gov.bz/">https://cito.gov.bz/</a>   |
| 11. | BELIZE AGREEMENT BETWEEN THE GOVERNMENT OF THE REPUBLIC OF CHINA (TAIWAN) AND THE GOVERNMENT OF BELIZE ON COOPERATION IN INFORMATION AND COMMUNICATION TECHNOLOGY (ICT) (2014-2019)<br><a href="https://law.moj.gov.tw/ENG/LawClass/LawAll.aspx?pcode=Y0080374">https://law.moj.gov.tw/ENG/LawClass/LawAll.aspx?pcode=Y0080374</a>                                 |
| 12. | Belize To Implement Digital Government Transformation<br><a href="https://www.ambergristoday.com/news/2019/11/29/belize-implement-digital-government-transformation">https://www.ambergristoday.com/news/2019/11/29/belize-implement-digital-government-transformation</a>   |
| 13. | A Brave New (Digital) World: The Power of E-Government<br><a href="https://www.dgft.gov.bz/a-brave-new-digital-world-the-power-of-e-government/">https://www.dgft.gov.bz/a-brave-new-digital-world-the-power-of-e-government/</a>  |
| 14. | Open Government in action: OAS and Germany support new initiatives in Latin America<br><a href="https://www.opengovpartnership.org/stories/open-government-in-action-oas-and-germany-support-new-initiatives-in-latin-america/">https://www.opengovpartnership.org/stories/open-government-in-action-oas-and-germany-support-new-initiatives-in-latin-america/</a> |
| 15. | The Trust for the Americas<br><a href="https://www.trustfortheamericas.org/about-us">https://www.trustfortheamericas.org/about-us</a>  |
| 16. | BELIZE OPEN GOVERNMENT ACTION PLAN DEVELOPMENT IN TIMES OF COVID-19<br><a href="https://www.trustfortheamericas.org/media/projects/attachments/en/Developing_an_Open_Government_Action_Plan.pdf">https://www.trustfortheamericas.org/media/projects/attachments/en/Developing_an_Open_Government_Action_Plan.pdf</a>   |

### 4.3.8 Infrastructure and Energy

|   |  |
|---|--|
| Transport                                 |  |
| Overview                                  | Inland transportation is mainly by car.<br>The main public transportation is buses and taxis. There are several domestic air routes. |
| Leadership governance                     | Minister of Public Utilities, Energy and Logistics<br>Department of Transport  |
| Major development partners                | IADB   |
| Energy and electricity                    |  |
| Overview                                  | 60% of primary energy is imported from Mexico as fossil fuels and electricity.   |
| Carbon neutral national plan              | 2014-2024 National Environmental Policy and Strategy<br>Renewable energy generation target: 85% by 2030 (conditional NDC target)     |
| Leadership governance and utility company | Minister of Public Utilities, Energy and Logistics<br>Belize Electricity Limited (BEL)   |
| Major development partners                | JICA / UNDP  |

Source: JICA Study Team with reference to various websites of the government organization and international organization (WB / IEA / IRENA / US DOE).

### 4.3.9 Tourism

The tourism sector of Belize is the most vulnerable in Central America

|   |  |  |
|---|--|--|
| Number of international tourist arrivals (2019) |  | 503,000  |
| International Tourism Receipts (2019)           |  | USD 510 million  |
| Tourism Competitiveness Ranking (2019)          |  | N / A  |
| Tourism Dependency Index (2019)                 |  | 37.9 (15th out of 166 countries)   |
| Government of Japan policy                      | Number of JICA projects in the last 10 years   | none   |
|   | References to the Country Assistance Policy  | none   |
|   | Interest in pilot projects   | N / A  |
| Tourism industry vulnerability                  | Percentage of tourism in GDP (2019)  | 37.2% (5th out of 23 countries)  |
|   | Contribution of Travel & Tourism to employment (2019)  | 39.3% (7th out of 23 countries)  |
|   | Contribution of Travel & Tourism to consumption (2019)   | 87% (9th out of 23 countries)  |
|   | Top 3 nationalities of visitors (2019)   | USA (64.85%)<br>Canada (7.06%)<br>UK (3.05%)   |
| Importance of tourism                           | Ratio of the budget amount of tourism-related ministries to the national budget amount (2019)            | 0.2% (12th out of 16 countries)<br>National budget: BZD 1,077,000,800<br>Budget of tourism-related ministries: BZD 2,576,469   |
|   | Whether or not it is mentioned as a priority sector in the National Economic and Social Development Plan | Yes<br>Plan name: Vision of Belize by the Year 2030<br>Reference example: As one of Strategies to Achieve the Goals for Economic Resilience, 4. Support Sustainable Fisheries and Build Sustainable and Responsible Tourism (p.27) |
|   | Existence of effective national tourism policies / strategies / plans                                    | Yes (National Sustainable Tourism Master Plan for Belize 2030)   |

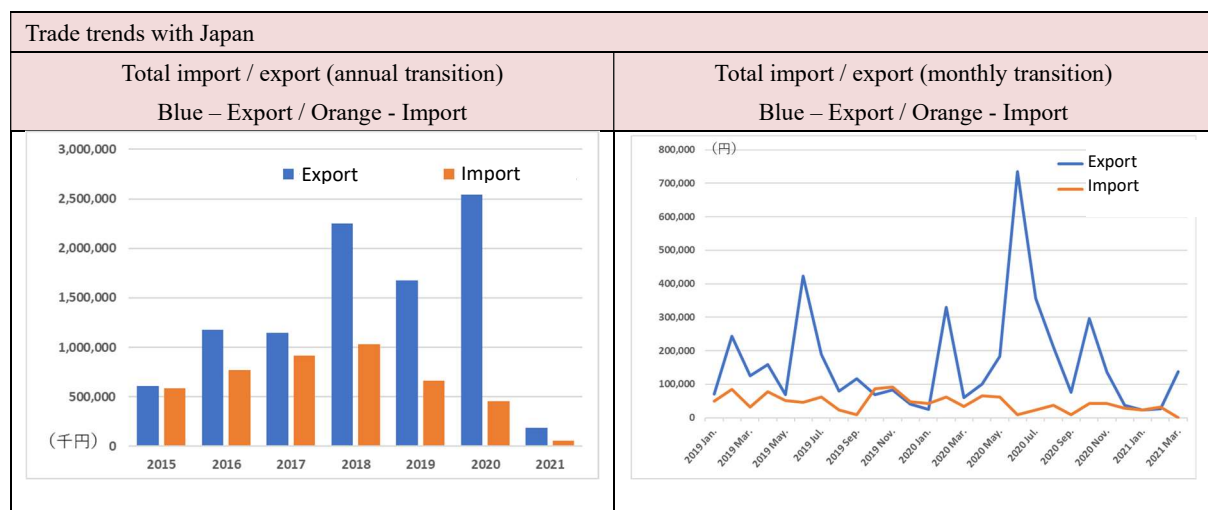


|  |   |   |
|--|---|---|
| Impact of COVID-19   | Changes in the contribution of Travel & Tourism to GDP (2019 → 2020)        | -63.6% (10th out of 23 countries)   |
|  | Changes in the contribution of Travel & Tourism to employment (2019 → 2020) | -18.3% (22nd out of 23 countries)   |
| Number of government support measures for the tourism sector |   | 4 (Monetary policy: 1, Resumption of tourism: 1, Health and safety protocol: 1, Domestic travel: 1) |

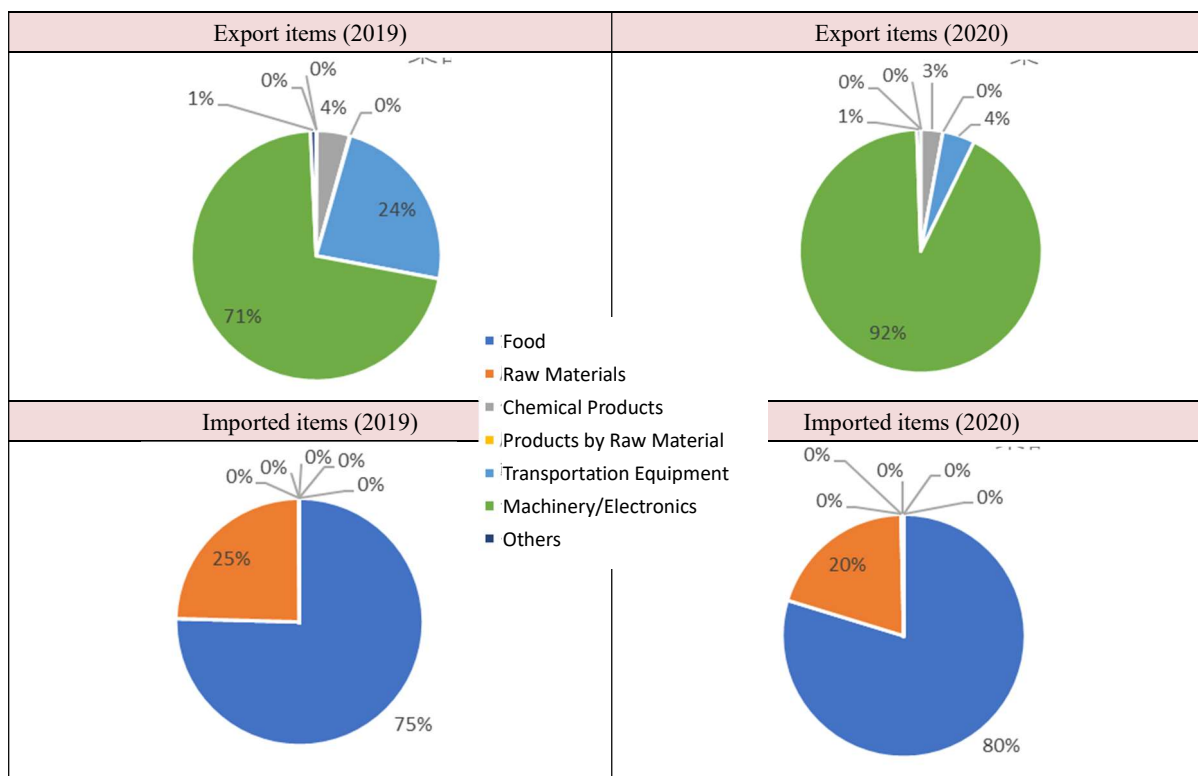
Source: Survey Team

### 4.3.10 Public-private partnership

| item   |  | Contents    |
|--|--|-------------|
| No. of JICA Public-Private Partnership Projects (After 2012)                 | Cooperation preparatory survey (overseas investment and financing) (former PPP infrastructure project)           | 0 cases     |
|  | Overseas investment and loan   | 0 cases     |
|  | SME Partnership Promotion Survey (support for Small-sized Enterprise)  | 0 cases     |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for small- and medium- sized enterprise) | 0 cases     |
|  | SDGs Business Verification Survey with Private Sector (support for small- and medium- sized enterprise)          | 0 cases     |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for large enterprise)                    | 0 cases     |
|  | SDGs Business Verification Survey with Private Sector (support for large enterprise)                             | 0 cases     |
| Total number of Japanese private companies entering the market (2019 survey) | Total number of business locations   | 2 companies |
|  | Overseas branches of Japanese companies,   | 0 companies |
|  | Local corporations wholly owned by Japanese companies and their branches   | 0 companies |
|  | Branch offices wholly owned by Japanese companies and their branches   | 0 companies |
|  | joint ventures (local corporations in which Japanese companies have a direct or indirect stake of 10% or more)   | 1 company   |
|  | joint ventures (Branch offices in which Japanese companies have a direct or indirect stake of 10% or more)       | 0 companies |
|  | companies established overseas by Japanese nationals (in which Japanese nationals have a stake of 10% or more)   | 1 company   |
|  | Unknown classification   | 0 companies |
| Number of Japanese residents (2020 survey)                                   | Total  | 51 people   |
|  | Long-term residents  | 44 people   |
|  | Permanent resident   | 7 people    |
| Business Environment   | Doing Business 2020 Rank   | 135th place |
| PPP Project  | Existence of PPP law scheme  | ×           |
|  | PPP project with Japanese companies  | 0 cases     |







**Gathering information about the PPP system**

| Nº  | Task Item   | Inquiries/comments/status<br>Title of submitted file  | Source/URL  |
|-----|---|---|---|
| 1   | <b>PRIORITY 4. PPP Sector</b>   |   |   |
| 1.1 | PPP Projects in selective countries<br>PPP rules and regulations in Central America and Caribbean Countries |   | All below can be useful   |
| A   | PPP laws and Regulations<br>if there is any, when, and how  | There is no PPP Law   | <a href="https://pppknowledgelab.org/countries/belize">https://pppknowledgelab.org/countries/belize</a>   |
| B   | PPP Unit Organization<br>if there is any, how structured  | There is no PPP Unit  |   |
| C   | PPP sectors<br>in what sectors are the PPPs allowed   | Any sector is allowed   |   |
| D   | Proposal Types (Solicited or Unsolicited)<br>unsolicited  | There is information about 2 PPP projects but there is no information if they were solicited or unsolicited   | <a href="https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=Latin+America+and+the+Caribbean&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=&amp;header=true">https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=Latin+America+and+the+Caribbean&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=&amp;header=true</a>   |
| E   | PPP Forms<br>BOT,BTO,DB,,,what form are allowed   | There is no information that can lead us to conclude that they restrict some forms of PPP   |   |
| F   | PPP types<br>Availability payment, service purchase   | There is no information that can lead us to conclude what PPP types can be used, the research shows that there is only 1 PPP project and there is no information of what type it is. There is a loan made by the CDB (Caribbean Development Bank) | <a href="https://www.caribank.org/newsroom/news-and-events/cdb-connect-island-caye-caulker-belize-national-electricity-grid-making-gains-environment-energy">https://www.caribank.org/newsroom/news-and-events/cdb-connect-island-caye-caulker-belize-national-electricity-grid-making-gains-environment-energy</a><br><a href="https://www.bel.com.bz/press_releases/2019/22032019-1.pdf">https://www.bel.com.bz/press_releases/2019/22032019-1.pdf</a> (relevant news)<br><a href="http://www.bel.com.bz/Caye%20Caulker%20Environment%20and%20Social%20Impact%20Assessment%20Report.pdf">http://www.bel.com.bz/Caye%20Caulker%20Environment%20and%20Social%20Impact%20Assessment%20Report.pdf</a> (Environmental and Social Impact Assessment Final Report) |
| G   | PPP Project Trends<br>how much PPP projects in the last 10 years  | Belize Electricity Limited (2010)<br>Belize Electricity Limited (2011)<br>Caye Caulker to Ambergris Caye submarine cable (2019)<br>See file "210520_PPP Database"   | <a href="https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=Latin+America+and+the+Caribbean&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=&amp;header=true">https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=Latin+America+and+the+Caribbean&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=&amp;header=true</a>   |
| H   | Participation of Japanese firms in PPP Projects<br>if any (check news source)                               | No information found  | <a href="https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=Latin+America+and+the+Caribbean&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CNP%2CLC&amp;header=true">https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=Latin+America+and+the+Caribbean&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CNP%2CLC&amp;header=true</a>   |
|     | Any notable points for each country<br>if any   | The investigation showed that there were 2 projects, of which one was canceled and the other is the Caye Caulker submarine cable project. The report of the last mentioned project was searched but could not be found, it was only               | <a href="https://www.bel.com.bz/press_releases/2019/22032019-1.pdf">https://www.bel.com.bz/press_releases/2019/22032019-1.pdf</a> (relevant news)<br><a href="http://www.7newsbelize.com/printstory.php?func=print&amp;id=51560">http://www.7newsbelize.com/printstory.php?func=print&amp;id=51560</a> (relevant news)  |

Source: Survey Team

## 5. Costa Rica

### 5.1 Country overview

#### 5.1.1 Basic information

Republic of Costa Rica (Spanish: República de Costa Rica), commonly known as Costa Rica, is a republican nation located in the southern part of Central America. It borders Nicaragua to the north and Panama to the southeast, facing the Pacific Ocean to the south and the Caribbean Sea to the north. In 1949, a constitution was enacted to abolish the standing army, and the country became a country without a standing army, but the constitution also stipulates emergency conscription. Along with Chile and Uruguay, it is the country with the longest democratic tradition in Latin America, and in Central America it is an exceptionally politically stable country with good economic conditions called "Central American paradise". However, since the 1990s, the rampant drug has worsened public security and destabilized society. Costa Rica has undergone extensive disarmament since the 19th century, and the Costa Rican army, said to be the largest in Central America, had been reduced to just one battalion during the civil war. President José Figueres, who won the civil war in 1947, abolished the permanent army by the Constitution in 1948. The basic policy of political diplomacy is cooperation with the United States and anti-communism. Although he did not have diplomatic relations with China or Cuba from an anti-communist point of view, he broke with Taiwan at the same time as establishing diplomatic relations with China in June 2007. It was one of the poorest regions in the world during the colonial era, but after World War II, it was called the "Honor Student of Central America", and with the export of coffee and bananas since the 19th century, it was political. Economic growth continued with stability. Since the 1960s, industrialization has progressed due to the introduction of foreign capital, and now it has changed from an agricultural country to an industrial country, making it the second richest country in Central America after Panama.

#### 5.1.2 General circumstances

|             |   |                 |  |
|-------------|---|-----------------|--|
| 1 area      | 51,100 square kilometers (total area of Kyushu and Shikoku) | 2 Population    | 4.99 million (2018 World Bank)   |
| 3 Capital   | San Jose (elevation 1,200 meters)                           | 4 ethnic groups | Many mixed races with Europeans and indigenous peoples, Latin Americans, Africans, Jews, Chinese, indigenous peoples |
| 5 languages | Spanish   | 6 religion      | Catholicism (with freedom of religion and religion)  |

Source: Ministry of Foreign Affairs HP Costa Rica Basic Data

#### 5.1.3 Economic overview

|                          |   |                              |   |
|--------------------------|---|------------------------------|---|
| 1 Major industry         | Agriculture (banana, pineapple, coffee, etc.), manufacturing (medical equipment), tourism   | 2 GDP<br>3 GNI / person      | \$ 60,100 million (2018, Central Bank)<br>US \$ 19,830 (2019) |
| 4 Economic growth rate   | 3.2% (2017, Central Bank)   | 5 Unemployment rate          | 9.3% (2017, Central Bank)                                     |
| 6 Price increase rate    | 2.57% (2017, Central Bank)  |                              |   |
| 7 Total trade amount     | Exports (FOB): \$ 11,068 million (up 7.0% year-on-year)<br>Imports (CIF): \$ 16,574 million (up 0.4% year-on-year) (2017 Trade Promotion Organization)  |                              |   |
| 8 Major trade items      | Export: Medical equipment, tropical fruits, coffee, pharmaceuticals, etc. (2017 Trade Promotion Organization)<br>Imports: automobiles, petroleum products, mobile phones, pharmaceuticals, corn, etc.   |                              |   |
| 9 Major trading partners | Exports: USA, Panama, Netherlands, Nicaragua, Guatemala<br>Imports: USA, China, Mexico, Japan, Guatemala (2017 Trade Promotion Organization)  |                              |   |
| 10 currencies            | Colon ( ¢ )   | 11 Foreign currency reserves | \$ 7,150 million (2017 Central Bank)                          |
| 12 National budget       | na  | 13 External debt balance     | \$ 26,885 million (2017 Central Bank)                         |
| 14 Economic overview     | (1) Costa Rica has continued stable growth of about 3-5% since 2010, and the inflation rate has been suppressed to -2.57%, so the macroeconomic environment is stable. On the other hand, with a budget |                              |   |

|  |  |
|--|--|
|  | <p>deficit of 6.2% of GDP, fiscal reform has become a top priority.</p> <p>(2) Costa Rica has traditionally been an economy centered on agriculture such as coffee and bananas, but since Intel in the United States invested in a microchip manufacturing plant in 1998, foreign companies have entered the market one after another. It has contributed to economic growth (then Intel's manufacturing division withdrew). In recent years, the growth of service industries such as software development and call centers has been remarkable, and it has become an important means of earning foreign currency along with the tourism industry centered on ecotourism. In recent years, the development and production of medical devices such as artificial limbs and catheters, and the growth of the life science industry have been remarkable, and we are trying to diversify export items such as pineapples and melons for agricultural products.</p> <p>(3) Free trade agreements include Mexico, former Central American Common Market member countries (Guatemala, El Salvador, Honduras, Nicaragua), Dominican Republic, Chile, Canada, Caribbean Community, Panama, USA (Central America, Dominican Republic, USA in 2009) Free Trade Agreement (DR-CAFTA) comes into effect), with China, Peru, Singapore, Colombia and the European Free Trade Union. In 2013, the Central America-EU Cooperation Agreement came into effect. A general agreement was reached with the South Korea / Central America FTA in 2016, and it will come into effect in 2019. Since 2013, he has participated in the Pacific Alliance as an observer (premise observer).</p> |
|--|--|

Source: Ministry of Foreign Affairs HP Costa Rica Basic Data

## 5.1.4 Country-specific development cooperation policy

### (1) Government of Japan Development Cooperation Policy by Country

**Table 5-1 Overview of Japan's ODA to Costa Rica**

|  |  |
|--|--|
| <b>1. 1. Overview</b>  |  |
| Japan's economic cooperation with Costa Rica begins with the conclusion of the Japan Overseas Cooperation Volunteers (JOCV) dispatch arrangement in 1973, the start of JOCV dispatch in 1974, and the conclusion of an exchange letter for the loan aid "Caldera Port Construction Plan" in the same year. After that, in 1989, we started grassroots human security grant aid. Currently, we are implementing cooperation centered on loan aid and technical cooperation.   |  |
| <b>2. 2. Aim of development cooperation</b>  |  |
| Support utilizing Japan's knowledge in the environmental field is of great significance from the perspective of promoting cooperation with important countries in dealing with climate change issues, and is also expected to contribute to the sustainable development of the country. In addition, promotion of regional integration by promoting support for the country, which is relatively economically and socially stable in the Central American region and is in a leading position in the region, as well as triangular cooperation and regional cooperation based in the country. Contribute to.   |  |
| <b>3. 3. Basic policy</b>  |  |
| The basic policy is to support sustainable development centered on the environmental field. Based on the significance of the above assistance and the needs of the country, Japan will cooperate mainly in supporting environmental issues including climate change countermeasures. In addition, we will endeavor to cooperate in reducing disparities for sustainable development and to support vulnerable groups such as residents in poor areas and people with disabilities.   |  |
| <b>4. Priority areas</b>   |  |
| (1) Environmental protection: Costa Rica aims to realize "carbon neutral" and aims to develop clean energy and promote the spread of electric vehicles, and Japan actively cooperates as Japan with advanced technology and knowledge in this field. Promote and develop Furthermore, we will continue to cooperate in improving the living environment and preserving the natural environment, such as sewage treatment and industrial waste treatment. In addition, we will implement cooperation that contributes to the improvement of disaster prevention capacity by utilizing Japan's experience.   |  |
| (2) Correcting disparities: Costa Rica has a relatively stable socio-economic situation among Central American countries, but for sustainable growth, it will continue to promote the manufacturing industry, service industry, agriculture, forestry and fisheries, and livelihoods of residents. The challenge is to create opportunities to improve quality. In particular, we will implement cooperation on technological improvement and strengthening of international competitiveness in order to foster and promote small and medium-sized enterprises, which account for 98% of domestic enterprises. Furthermore, we will endeavor to provide support that contributes to the development of small-scale farmers and local industries, as well as the improvement of the livelihoods of local residents. |  |

Source: Ministry of Foreign Affairs HP Costa Rica Country Data Collection 2017

**Table 5-2 National Development Cooperation Policy for Costa Rica (January 2017)**

|   |   |
|---|---|
| <b>3. 3. Priority field (medium goal)</b> |   |
| (1) Environmental protection              | We will promote and develop cooperation that contributes to the development of clean energy, promotion of the introduction of environment-friendly transportation such as electric vehicles, improvement of living environment such as sewage treatment and waste treatment, conservation of natural environment, and improvement of disaster prevention capacity against natural disasters and climate change. |
| (2) Correcting disparities                | Create opportunities to promote high value-added manufacturing, service and agriculture, forestry and fisheries, and improve the quality of life of residents. We will endeavor to improve technology   |



**1) Infection spread and alleviation of aggravation and death**

No material was available.

**2) Support for affected industries and people**

**Table 5-3 Support for Affected Industries and People (Costa Rica)**

| Various government policies (COVID-19 Observatory for LAC) |     |  |  |
|--|-----|--|--|
| Socioeconomic policy                                       | 47  |  |  |
| Health care & nutrition                                    | 12  |  |  |
| Education  | 8   |  |  |
| Agriculture & rural development                            | 0   |  |  |
| Private sector   | 46  |  |  |
| Environment & disaster prevention                          | 0   |  |  |
| Governance and social security                             | 7   |  |  |
| DX and innovation  | 5   |  |  |
| Infrastructure & energy                                    | 0   |  |  |
| Tourism  | 0   |  |  |
| PPP  | 0   |  |  |
| Others (b)   | 27  |  |  |
| total  | 152 |  |  |

Source: Survey Team

**3) Arrangement of various policies for COVID-19 taken by the government**

COVID-19 Observatory for Latin America and Caribbean (ECLAC) organized by governments

**Table 5-4 Government-directed COVID-19 Policy Categories (Costa Rica)**

**Follow-up of the evolution of COVID-19 Measures**

| <b>Vaccination</b>  | <b>Economy</b>   | <b>Social protection</b>  |
|---|--|---|
| 1. Vaccination measures   | 1. Fiscal Policy   | 1. Cash transfers (new transfers, increase in existing transfers, expansion of cash transfers to new recipients, early disbursement of transfers) |
| <b>Movements across and within countries</b>  | 2. Monetary Policy   | 2. Food transfers / In-kind transfers   |
| 1. Restrictions or prohibition on the entry of foreign travelers  | 3. Business policy   | 3. Guarantee of basic services  |
| 2. Border closures and controls   | 4. Restriction of economic activity (including shops and shopping centers)                             | <b>Education / schools</b>  |
| 3. Border controls  | 5. Price and quantity controls   | 1. Suspension of classes  |
| 4. Restriction or closure of public places and mass gatherings  | 6. Economic Stimulus (includes aggregate value of fiscal measures and separately of credit guarantees) | 2. Provision of tools for distance learning (online platforms, TV, radio, distance-learning materials)  |
| 5. Other  | 7. Regulation of the personal hygiene and cleaning products market                                     | 3. Maintenance of school feeding programme (indicating under which modalities)  |
| <b>Health</b>   | 8. Debt relief and suspension of credit payments (individuals, microentrepreneurs)                     | <b>Gender</b>   |
| 1. Health emergency   | 9. Other   | 1. Gender-based violence against women  |
| 2. Mandatory coverage   | <b>Labor</b>   | 2. Care economy   |
| 3. Mandatory quarantine for foreign travelers, confirmed or suspected cases                                   | 1. Labor Protection  | 3. Employment and income generation   |
| 4. Mandatory general quarantine   | 2. Elective work leave   | 4. Benefits, transfers and other social protection measures   |
| 5. Type of policy on testing (universal, reduced to certain groups, etc.)                                     | 3. Reduction of working hours  | 5. Women's participation in the digital era   |
| 6. Free test coverage expansion   | 4. Prohibition of dismissal from work  | 6. Other  |
| 7. Hospitals (mechanical ventilators, additional ICU beds, protection equipment, temporary hospitals, others) | 5. Other   |   |

Source: Survey Team

## 5.2 Macroeconomic analysis and selection of priority countries

### 5.2.1 Macroeconomic analysis

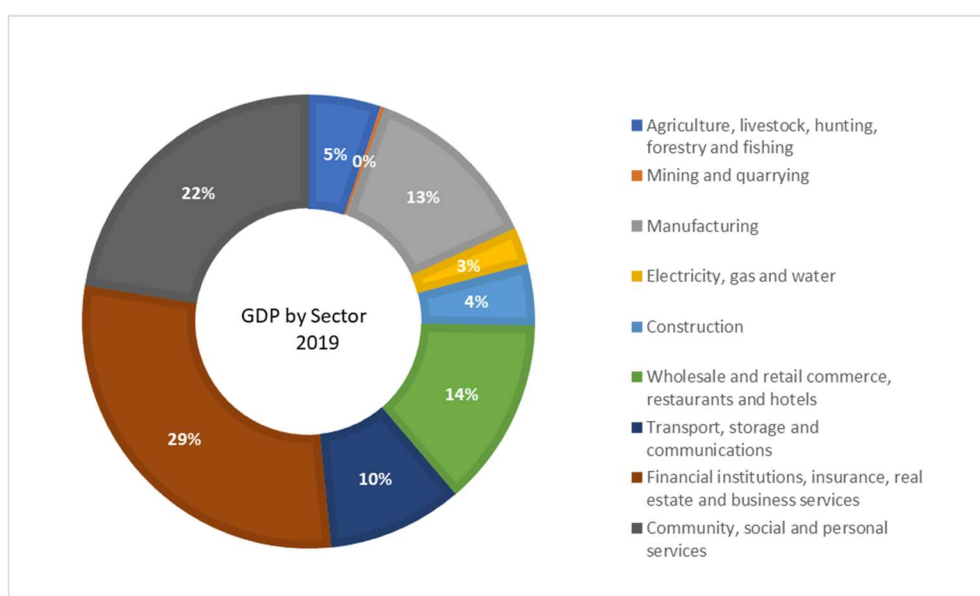
#### (1) Industrial composition

**Table 5-5 Industrial Composition (Costa Rica)**

Table: Gross domestic product, by sector (En millones de colones, a precios constantes de 2012)

|  | 2011       | 2012       | 2013       | 2014       | 2015       | 2016       | 2017       | 2018       | 2019a/     | 2020 b/ |
|--|------------|------------|------------|------------|------------|------------|------------|------------|------------|---------|
| Agriculture, livestock, hunting, forestry and fishing                | 1,205,842  | 1,264,236  | 1,265,571  | 1,285,040  | 1,249,991  | 1,315,094  | 1,364,164  | 1,388,743  | 1,372,711  |         |
| Mining and quarrying   | 64,729     | 68,308     | 72,281     | 73,114     | 78,744     | 81,802     | 77,496     | 81,329     | 77,157     |         |
| Manufacturing  | 3,052,860  | 3,155,296  | 3,158,855  | 3,184,462  | 3,022,342  | 3,158,780  | 3,263,656  | 3,345,588  | 3,408,641  |         |
| Electricity, gas and water   | 614,342    | 650,231    | 558,937    | 578,867    | 642,377    | 676,700    | 700,415    | 700,976    | 714,291    |         |
| Construction   | 1,197,851  | 1,252,621  | 1,133,644  | 1,157,029  | 1,265,768  | 1,223,206  | 1,197,509  | 1,293,789  | 1,155,563  |         |
| Wholesale and retail commerce, restaurants and hotels                | 2,716,248  | 2,820,767  | 3,012,416  | 3,155,464  | 3,292,549  | 3,428,565  | 3,512,681  | 3,579,964  | 3,585,945  |         |
| Transport, storage and communications                                | 1,600,957  | 1,724,143  | 1,792,927  | 1,904,843  | 2,060,531  | 2,135,382  | 2,355,074  | 2,457,600  | 2,563,615  |         |
| Financial institutions, insurance, real estate and business services | 5,071,557  | 5,529,731  | 5,783,510  | 6,046,424  | 6,443,326  | 6,826,573  | 7,182,033  | 7,488,484  | 7,763,566  |         |
| Community, social and personal services                              | 4,835,254  | 4,916,743  | 5,087,946  | 5,261,141  | 5,365,514  | 5,527,782  | 5,678,481  | 5,731,851  | 5,973,686  |         |
| Total  | 20,359,640 | 21,382,077 | 21,866,087 | 22,646,386 | 23,421,142 | 24,373,884 | 25,331,508 | 26,068,324 | 26,615,176 | 0       |

Source: ECLAC



Source: Survey Team



## (2) Trends in major economic indicators

**Table 5-6 Trends in Major Economic Indicator (Costa Rica)**

Table 1 COSTA RICA: MAIN ECONOMIC INDICATORS (Annual growth rates)

|  | 2011     | 2012     | 2013     | 2014     | 2015     | 2016     | 2017     | 2018     | 2019a/   | 2020 b/  |
|--|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|
| Gross domestic product (Annual growth rates c/)                                      | 4.3      | 4.8      | 2.3      | 3.5      | 3.6      | 4.2      | 3.9      | 2.7      | 2.1      | -4.8     |
| Per capita gross domestic product (Annual growth rates c/)                           | 3.1      | 3.6      | 1.1      | 2.4      | 2.5      | 3.1      | 2.8      | 1.8      | 1.1      | -5.8     |
| Gross domestic product, by sector (Annual growth rates c/)                           |          |          |          |          |          |          |          |          |          |          |
| Agriculture, livestock, hunting, forestry and fishing                                | 0.7      | 4.8      | 0.1      | 1.5      | -2.7     | 5.2      | 3.7      | 1.8      | -1.2     | -0.9     |
| Mining and quarrying   | -7.4     | 5.5      | 5.8      | 1.2      | 7.7      | 3.9      | -5.3     | 4.9      | -5.1     | -12.0    |
| Manufacturing  | 3.0      | 3.4      | 0.1      | 0.8      | -5.1     | 4.5      | 3.3      | 2.5      | 1.9      | 3.3      |
| Electricity, gas and water   | 3.4      | 5.8      | -14.0    | 3.6      | 11.0     | 5.3      | 3.5      | 0.1      | 1.9      | -6.4     |
| Construction   | 1.1      | 4.6      | -9.5     | 2.1      | 9.4      | -3.4     | -2.1     | 8.0      | -10.7    | -10.5    |
| Wholesale and retail commerce, restaurants and hotels                                | 4.9      | 3.8      | 6.8      | 4.7      | 4.3      | 4.1      | 2.5      | 1.9      | 0.2      | -18.5    |
| Transport, storage and communications  | 9.7      | 7.7      | 4.0      | 6.2      | 8.2      | 3.6      | 10.3     | 4.4      | 4.3      | -9.4     |
| Financial institutions, insurance, real estate and business services                 | 6.6      | 9.0      | 4.6      | 4.5      | 6.6      | 5.9      | 5.2      | 4.3      | 3.7      | -0.7     |
| Community, social and personal services  | 1.8      | 1.7      | 3.5      | 3.4      | 2.0      | 3.0      | 2.7      | 0.9      | 4.2      | -1.3     |
| Balance of Payments (Millions of dollars)  |          |          |          |          |          |          |          |          |          |          |
| Current account balance  | -2,265.1 | -2,411.1 | -2,431.2 | -2,453.1 | -1,921.3 | -1,257.3 | -1,961.1 | -1,998.5 | -1,415.3 | -1,742.0 |
| Goods balance  | -5,027.3 | -5,348.0 | -5,558.8 | -5,328.8 | -4,607.1 | -4,426.1 | -4,370.0 | -4,389.3 | -3,802.3 | -1,943.1 |
| Exports, f.o.b.  | 8,301.4  | 8,922.6  | 8,866.3  | 9,455.6  | 9,452.4  | 10,100.3 | 10,807.8 | 11,473.6 | 11,622.9 | 11,436.8 |
| Imports, f.o.b.  | 13,328.7 | 14,270.6 | 14,425.1 | 14,784.3 | 14,059.5 | 14,526.3 | 15,177.8 | 15,862.8 | 15,425.2 | 13,959.0 |
| Services trade balance   | 3,832.8  | 3,984.3  | 4,563.6  | 4,539.3  | 4,608.6  | 5,109.8  | 4,796.6  | 5,189.0  | 5,413.7  | 3,402.9  |
| Income balance   | -1,418.1 | -1,455.7 | -1,828.1 | -2,113.9 | -2,379.9 | -2,451.6 | -2,890.6 | -3,261.6 | -3,599.5 | -3,431.3 |
| Net current transfers  | 347.6    | 408.3    | 392.1    | 450.2    | 457.1    | 510.5    | 502.9    | 463.3    | 513.3    | 463.1    |
| Capital and financial balance (Millions of dollars)                                  |          |          |          |          |          |          |          |          |          |          |
| Net foreign direct investment d/   | 2,328.2  | 1,802.7  | 2,401.5  | 2,817.7  | 2,541.3  | 2,127.0  | 2,583.2  | 2,183.1  | 2,481.2  | 1,735.0  |
| Other capital movements d/   | 69.2     | 2,718.0  | 490.6    | -477.8   | 24.0     | -1,104.9 | -1,040.8 | 205.3    | 386.2    |          |
| Foreign remittance from abroad for 2019 and 2020                                     | 979.3    | 3,065.0  | 1,064.0  | 226.0    | 185.4    | -1,429.5 | -1,348.2 | -873.1   | -732.1   |          |
| Remittances from emigrant workers  | 487.0    | 527.0    | 561.1    | 558.5    | 517.5    | 514.8    | 527.2    | 499.0    | 518.8    | 222.0    |
| Microfinance dispatched and the sectors that received microfinance for 2019 and 2020 |          |          |          |          |          |          |          |          |          |          |

Source: Economic Survey of Latin America and the Caribbean 2020: Main conditioning factors of fiscal and monetary policies in the post-COVID-19 era

### 5.2.2 Impact analysis and identification of key sectors

#### (1) Impact assessment results for each sector by AHP analytic hierarchy process based on economic indicators

**Table 5-7 Results of Sector Impact Analysis by COVID-19 (Costa Rica)**

| ECLAC category   | Changes around COVID-19 | Trends before COVID-19 | Total GDP ratio of the sector | comprehensive evaluation |   |
|--|-------------------------|------------------------|-------------------------------|--------------------------|---|
| Importance (weight)  | 0.4590                  | 0.0660                 | 0.0750                        |                          |   |
| Agriculture, livestock, hunting, forestry and fishing                | 2                       | 3                      | 4                             | 0.031                    | 8 |
| Mining and quarrying   | 6                       | 2                      | 1                             | 0.066                    | 2 |
| Manufacturing  | 1                       | 4                      | 6                             | 0.026                    | 9 |
| Electricity, gas and water   | 7                       | 5                      | 2                             | 0.082                    | 6 |
| Construction   | 3                       | 1                      | 3                             | 0.037                    | 4 |
| Wholesale and retail commerce, restaurants and hotels                | 9                       | 7                      | 7                             | 0.114                    | 1 |
| Transport, storage and communications                                | 8                       | 9                      | 5                             | 0.103                    | 3 |
| Financial institutions, insurance, real estate and business services | 4                       | 8                      | 9                             | 0.068                    | 7 |
| Community, social and personal services                              | 5                       | 6                      | 8                             | 0.073                    | 5 |

Source: Survey Team

#### 1) ECLAC Sector Classification Amendments to the Sector Classification

In line with the method described in the main volume, the Sector Classification is divided into the Vertical Sector and the Cross-Cutting Sector, the ECLAC classification sector is allocated to the Vertical Sector Classification, and the evaluation of various policies related to COVID-19 taken by the government along with the results of the partner survey and the indicators of the national development

cooperation policy, the ranking of priority sectors are calculated using the four indicators, which are described in the table below.

**Table 5-8 Ranking of Priority Sectors (Costa Rica)**

|                                   | Economic Indicator Analysis | Government Policy on COVID-19 | Survey on COVID-19 by Development Partners | Country Development Cooperation Policy | Base Case |   | Priority |
|-----------------------------------|-----------------------------|-------------------------------|--|--|-----------|---|----------|
| Importance (weight)               | 0.6000                      | 0.2000                        | 0.1000                                     | 0.1000                                 |           |   |          |
| Social and Economic Policy        | 0.0000                      | 0.0618                        | 0.0000                                     | 0.0000                                 | 0.0618    |   | ○        |
| Health and Nutrition              | 0.0424                      | 0.0158                        | 0.0100                                     | 0.0000                                 | 0.0682    | 5 |          |
| Education                         | 0.0321                      | 0.0105                        | 0.0000                                     | 0.0000                                 | 0.0426    | 6 |          |
| Agriculture and Rural Development | 0.0709                      | 0.0000                        | 0.0100                                     | 0.0200                                 | 0.1009    | 3 | ○        |
| Manufacturing                     | 0.1245                      | 0.0605                        | 0.0200                                     | 0.0200                                 | 0.2250    | 2 | ○        |
| Environment/ Disaster Management  | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0400                                 | 0.0400    |   | ○        |
| Governance and Security           | 0.0000                      | 0.0092                        | 0.0000                                     | 0.0000                                 | 0.0092    |   | ○        |
| DX Innovation                     | 0.0000                      | 0.0066                        | 0.0300                                     | 0.0000                                 | 0.0366    |   | ○        |
| Infrastructure and Every          | 0.2495                      | 0.0000                        | 0.0100                                     | 0.0200                                 | 0.2795    | 1 | ○        |
| Tourism                           | 0.0807                      | 0.0000                        | 0.0200                                     | 0.0000                                 | 0.1007    | 4 |          |
| Public-Private Partnership        | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0000                                 | 0.0000    |   | ○        |

Source: Survey Team

## (2) Sensitivity analysis

### 1) Analysis case settings

Based on the above methodology, the following case settings were made.

**Table 5-9 Sensitivity Analysis Case-based Weighting Settings (Costa Rica)**

|  | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|--|-----------|------------------------|------------------------|------------------------|
| Economic indicator analysis  | 0.6       | 0.6                    | 0.5                    | 0.5                    |
| Investigation and arrangement of various policies for COVID-19 taken by the government | 0.2       | 0.1                    | 0.1                    | 0.1                    |
| Development partner survey results   | 0.1       | 0.2                    | 0.2                    | 0.3                    |
| Country-specific development cooperation policy  | 0.1       | 0.1                    | 0.2                    | 0.1                    |

Source: Survey Team

### 2) Summary of sensitivity analysis

The results of each sensitivity analysis are as summarized below. Sensitivity analysis did not show much change, which was close to the result of the base case.

**Table 5-10 Summary of Sensitivity Analysis Results (Costa Rica)**

|                                   | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|-----------------------------------|-----------|------------------------|------------------------|------------------------|
| Social and economic policy        |           |                        |                        |                        |
| Health care / nutrition           | 5         | 5                      | 5                      | 5                      |
| education                         | 6         | 6                      | 6                      | 6                      |
| Agriculture / rural development   | 3         | 4                      | 3                      | 4                      |
| Manufacturing industry            | 2         | 2                      | 2                      | 2                      |
| Environment / disaster prevention |           |                        |                        |                        |
| Governance and citizen security   |           |                        |                        |                        |
| DX / Innovation                   |           |                        |                        |                        |
| Infrastructure and Energy         | 1         | 1                      | 1                      | 1                      |
| sightseeing                       | 4         | 3                      | 4                      | 3                      |
| Public-private partnership        |           |                        |                        |                        |

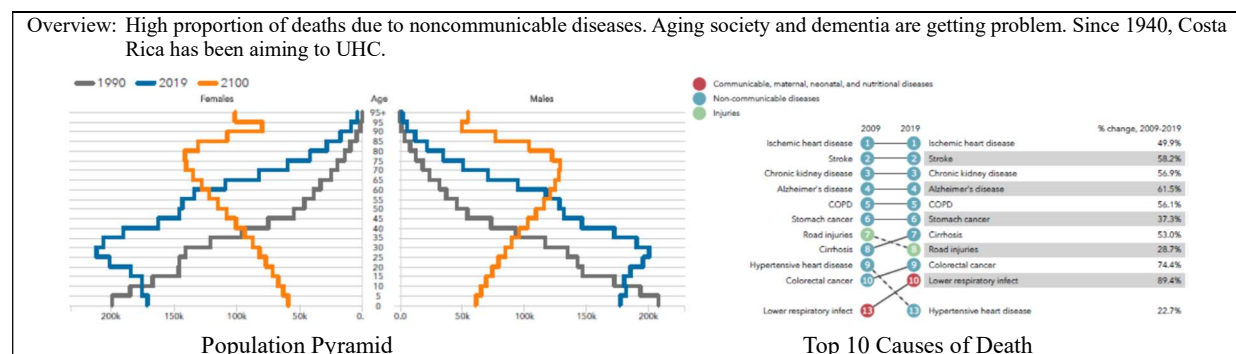
Source: Survey Team

### **(3) Selection of priority sectors by country**

From the above results, 1) social / economic policy, 2) manufacturing industry, 3) environment / disaster prevention, 4) governance / citizen security, 5) DX / innovation, 6) infrastructure / energy, 7) tourism, 8) public-private partnership are selected as priority sectors.

## 5.3 Country-specific information by sector

### 5.3.1 Health care / nutrition



| Demography                                      |   |   |   |   |                                   |                                       |  |
|---|---|---|---|---|-----------------------------------|---------------------------------------|--|
| Population                                      | Urban population (%)                      | Urban population growth (%)             | Life Expectancy (years)                     |   |                                   | Population ≥ 65 (%)                   |  |
| 4,999,441                                       | 80.08                                     | 1.88                                    | Male  | Female  | Both                              |                                       |  |
|   |   |   | 82.73                                       | 77.54   | 80.10                             | 9.55                                  |  |
| Maternal, Newborn and Child Health              |   |   |   |   |                                   |                                       |  |
| Total fertility rate                            | Neonatal mortality (per 1,000 livebirths) | Under 5mortality (per 1,000 livebirths) | Maternal mortality (per 100,000 livebirths) | Antenatal care ≥ 4 (%)                          | Immunization (1yr)                |                                       |  |
| 1.75  | 6.20                                      | 8.70                                    | 27  | 98  | DTP (%)                           | MCV1 (%)                              |  |
|   |   |   |   |   | 94                                | 94                                    |  |
| Nutrition                                       |   |   |   | Health Finance                                  |                                   |                                       |  |
| Under 5 Children                                |   | Adult overweight (%)                    |   | Current health expenditure per capita (USD PPP) |                                   | Current health expenditure to GDP (%) |  |
| Stunting (%)                                    | Overweight (%)                            | Male                                    | Female                                      |   |                                   | Out-of-pocket expenditure (%)         |  |
| 5.6   | 8.1                                       | 39                                      | 33  | 1,285   |                                   | 7.56                                  |  |
|   |   |   |   |   |                                   | 22                                    |  |
| Health Service Provision (per 1,000 population) |   |   |   | COVID-19 related Indicators as of January 2022  |                                   |                                       |  |
| Hospital beds                                   | Doctors                                   | Nurses                                  | Total confirmed cases (per million)         | Total death (per million)                       | Total number of tests (per 1,000) | People completed vaccination (%)      |  |
| 1.13  | 3.1                                       | 3.4                                     | 124,016.43                                  | 1,447.93  | 476.90                            | 70.61                                 |  |

Source: Graphs=Institute for Health Metrics and Evaluation, County Profile; Demography, Total fertility rate, Neonatal mortality, under-5 mortality, Health finance= World Development Indicators, the World Bank (Accessed on Aug 2021); Maternal mortality= UNICEF (Sep 2019); Antenatal care, Immunization, Nutrition, Health service provision,= OECD/The World Bank (2020), Health at a Glance: Latin America and the Caribbean 2020; COVID-19 related indicators= Our World in Data (Accessed on Jan 2022)

| Health                                  |  |
|---|--|
| Leadership/ Governance                  | Responsible Agency: Ministerio de Salud, Costa Rican Social Security Administration: CCSS)<br><a href="https://www.ministeriodosalud.go.cr/">https://www.ministeriodosalud.go.cr/</a><br>Centralized: Coordination between the Ministry of Health and CCSS, as well as update of services to respond people's needs are significant issues   |
| Service Providing System                | Major Relevant Policies: National Health Policy "Dr. Juan Guillermo Ortiz Guier", 2015<br>The CCSS is responsible for the Service Providing System of the public sector, covering from primary to tertiary level. Services are also available in remote areas. EBAIS (Integrated PHC Team) is responsible for the primary level.<br>Waiting time for non-urgent surgeries tends to be long, and heart attack treatment tends to take longer. The private sector also provides services ranging from outpatient to specialty care. The country is also focusing on medical tourism from abroad, especially from the US, and received 70,000 visitors in 2016. |
| Health Finance                          | National health insurance (coverage 94.4%) and government funding. Most facilities provide services free of charge, but non-medical payments (e.g., gratuities) are required. Private sector is self-funded or paid by private health insurance. Overall, health care costs are increasing rapidly.  |
| Human Resource for Health               | Doctors and nurses are not sufficient.   |
| IT/ Digital Health                      | National eHealth Strategy was developed. E-health record is introduced.<br>Under COVID-19 situation, PAHO supports telehealth including orientation, consultation, remote monitoring, health guidance and education.   |
| Drugs/ Medical Equipment                | CCSS procure and control for public sector. Health technology assessment (HTA) is introduced.  |
| Priority                                | Primary health care (PHC), Noncommunicable diseases (diabetes, cardiovascular diseases), disorder in neonatal period   |
| Communicable Disease Emergency Response | Necessary action and responses are undertaken along with IHR.<br>National influenza center: Instituto Costarricense de Investigación y Enseñanza en, Nutrición y Salud   |
| Major Development Partners              | PAHO/WHO   |
| Nutrition                               |  |
| Institutional Arrangement               | Ministry of Health and Wellness  |
| Major Relevant Policies                 | Política Nacional de Seguridad Alimentaria y Nutricional 2011-2021   |
| Human Resource for Health               | Nutrition related degrees: Yes<br>Nutrition related subjects in pre-service education: (no information)  |

|  |  |
|--|--|
|  | Number of nutrition related professionals: 45.2 per 100,000 population |
|--|--|

Source: Survey Team with reference to WHO Country Cooperation Strategy for Costa Rica at a glance, May 2016, Institute for Health Metrics and Evaluation, County Profile, OECD, Costa Rica Health System Performance Review, 2017, The Borgen Project, Healthcare in Costa Rica, July 2020, WHO, Global atlas of medical devices, 2017, and WHO, Nutrition Landscape Information System (NLIIS)

### 5.3.2 Education

| Overview  |  |  |                |                 |                 |         |
|---|--|--|----------------|-----------------|-----------------|---------|
| Number of children  | Education level  | Preschool  | primary        | Lower secondary | Upper secondary |         |
|   | 2019   | 136,907 people   | 497,065 people | 298,368 people  | 205,948 people  |         |
|   | Number of schools  | 3,310 schools  | 4,039 schools  | 893 schools     | ...             |         |
| Source: Institute for Statistics (UIS), UNESCO Bureau of Statistics   |  |  |                |                 |                 |         |
| Government authority  | Ministry of Public Education (Ministerio de Educación Pública)<br>Organigram <a href="https://www.mep.go.cr/sites/default/files/page/adjuntos/organigrama.pdf">https://www.mep.go.cr/sites/default/files/page/adjuntos/organigrama.pdf</a>   |  |                |                 |                 |         |
| Education indicator   | Net enrollment rate: primary education 99.9%, lower secondary 98.1%, upper secondary 93.7% (2019)<br>Primary education completion rate 102.7% (2019), out-of-school children rate 0.1% (2019), public education budget GDP ratio 7.0% (2019) Source: UIS   |  |                |                 |                 |         |
| Learning achievement survey   | As a result of PISA (2018), the average of 7th grade reading comprehension is 426 points, the average of mathematics is 402 points, and the average of science is 416 points, which is lower than the average of OECD countries (489 points). Of the students, 42% of reading comprehension, 60% of mathematics, and 48% of science have not reached level 2, which states that they "understand the basics."<br>As a result of the 4th Regional Education Quality Survey ERCE (2019), 3rd grade primary school math 725 points (medium in 17 countries), reading comprehension 748 points (medium in 17 countries), 6th grade math 726 points (medium in 17 countries), reading comprehension 757 points (middle in 17 countries), science 758 points (medium in 10 countries). |  |                |                 |                 |         |
| Impact of COVID-19  |  |  |                |                 |                 |         |
| School closure / reopening  | According to UNICEF, the number of days completely closed from March 11, 2020 to February 2, 2021 is 189 days, which is the fourth longest of the 23 Central American Caribbean countries. From March to May 2021, classes were held in a hybrid type combined with a remote and face-to-face lessons.   |  |                |                 |                 |         |
| COVID-19 measures   | Guidelines for distance education implementation support, policy for resuming face-to-face lessons, policy for learning evaluation in 2021   |  |                |                 |                 |         |
| Distance education  | Implementation status  | Set up an online platform. Classes are delivered daily on TV and radio. USB distribution with printed and digital teaching materials to children who cannot access them. The learning guide can be downloaded from the Ministry of Education website.<br>Data provided by the Ministry of Education (as of August 2021):<br><ul style="list-style-type: none"> <li>Distance education only 79 schools (1.5% of all schools)</li> <li>Hybrid type of distance education and face-to-face education: 5,247 schools (98.5% of all schools)</li> <li>Number of children attending hybrid education: 1,021,602</li> <li>Distance education only Number of students: 151,684</li> </ul> Distance Education Readiness Index Level 3 published by UNICEF "Distance education systems are considered to be relatively resilient, but there are serious concerns about potential learning losses and the ability to continue equivalent learning if face-to-face lessons are interrupted " |                |                 |                 |         |
|   | Access   | According to UNICEF statistical data, the percentage of school-aged children / students (2018) who can connect to the Internet at home in the country is as shown in the table below.  |                |                 |                 |         |
|   | 2018   | Rural area   | Urban area     | Poor            | wealthy class   | Overall |
|   | Whole school age   | 61   | 78             | 46              | 99              | 72      |
|   | Primary Education  | 61   | 74             | 44              | 99              | 70      |
|   | Lower secondary Education  | 60   | 81             | 46              | 99              | 74      |
|   | Upper secondary Education  | 60   | 86             | 46              | 100             | 77      |
| The government is implementing a project to provide the Internet to 215,000 poor households and electronic devices (computers and tablets) to 86,000 people.<br>Internet access rate for educational purposes at school: 83.94% for primary school, 70.51% for lower secondary school, 69.53% for upper secondary school (World |  |  |                |                 |                 |         |

|                                       |  |   |                              |        |                      |
|---------------------------------------|--|---|------------------------------|--------|----------------------|
|                                       |  | Bank)   |                              |        |                      |
|                                       | Teacher training   | More than 30,000 teachers (50% of the country) have received the following training so far. <ul style="list-style-type: none"> <li>Distance learning / virtual platform: 35,728 teachers in 2020, 15,465 teachers in 2021</li> <li>ICT technology: 14,760 in 2020, 4,229 in 2021</li> <li>Health and hygiene: 1,978 in 2020, 1,971 in 2021</li> </ul> |                              |        |                      |
| School hygiene                        | Infection control measures   | School Return Strategy Development: Includes teacher training guidelines, school lunch guidance, school hygiene guidance, and emergency treatment guidance in the event of an infection.  |                              |        |                      |
|                                       | Facility maintenance   | 2019  | Basic water supply equipment | toilet | Hand-wash facilities |
|                                       |  | Primary Education   | 86%                          | 71%    | 99% or more          |
|                                       |  | Secondary Education   | 76%                          | 89%    | 99% or more          |
|                                       |  | Urban area  | (Undeveloped 19%)            | 78%    | ...                  |
| Rural area                            |  | (Undeveloped 3%)  | 89%                          | ...    |                      |
|                                       |  | Source: World Bank / UNICEF Survey <a href="https://washdata.org/">https://washdata.org/</a>  |                              |        |                      |
| School lunch / nutrition              | Food and Nutrition Program for Children and Youth: The Ministry of Education replaces the school lunch program with an investment of approximately \$ 290 million in 850,000 children and students from March 2020 to September 2021 for approximately 1,600. Distribute 10,000 food packages. It is possible to cover one month's food expenses (lunch) with packages of food, meat, dairy products, fruits, vegetables, and greens. Gradually adjusting with the implementation of face-to-face lessons.   |   |                              |        |                      |
| Countermeasures for vulnerable people | Development of guidelines for a comprehensive approach to the vulnerable people<br>Distribution of educational materials for children with disabilities.   |   |                              |        |                      |
| Support for donors, etc.              | IDB: <ul style="list-style-type: none"> <li>Strengthening vocational training for vulnerable adolescents in COVID-19 disaster (\$ 700,000)</li> <li>Support for science and environmental education for secondary education students in rural communities (support for continued education) (\$ 1,470,000)</li> <li>Improving the quality of education in COVID-19 disaster (measures to train teachers, develop teaching materials, and prevent dropouts in vulnerable areas where distance learning is difficult to access) (\$ 232,000)</li> <li>Providing a content library of "Sesame Street" containing over 120 hours of educational programs</li> </ul> UNICEF: Learning guides, hygiene equipment, hygiene guidance, support for hygiene campaigns, distribution of hygiene kits to children, provision of 77 computers to secondary schools, distance learning support through television and radio programs |   |                              |        |                      |

Source: Survey Team

### 5.3.3 Agriculture / rural development

|   |   |           |           |           |           |           |
|---|---|-----------|-----------|-----------|-----------|-----------|
| Urban / rural population ratio                    | 79.3% / 20.7% (FAOSTAT 2018)  |           |           |           |           |           |
| Agricultural land area                            | 1,775,500 ha (FAOSTAT 2019) 1)  |           |           |           |           |           |
| Agricultural sector employment                    | 11.9% of all employment (FAOSTAT 2019) 2)   |           |           |           |           |           |
| Agricultural GDP                                  | 4.4% of total GDP (World Bank 2020)   |           |           |           |           |           |
| Of the agricultural sector Value added amount     | \$ 2,922,117.31 1,000 (including forestry) (World Bank 2020) 3)   |           |           |           |           |           |
| Agricultural sector expenditure ratio             | Ratio of agricultural fiscal expenditure to national budget (%) 4)  |           |           |           |           |           |
|   | 2018  | 2019      | 2020      |           |           |           |
|   | 1.65  | 1.51      | 1.41      |           |           |           |
| Of the agricultural sector Export-import balance  | Trade Balance (USD1,000 FAOSTAT) 5)   |           |           |           |           |           |
|   |   | 2015      | 2016      | 2017      | 2018      | 2019      |
|   | export  | 4,109,380 | 4,436,400 | 4,911,149 | 4,635,736 | 4,506,401 |
|   | Import  | 1,759,484 | 1,926,295 | 2,045,849 | 1,999,979 | 2,006,145 |
| Balance of payments                               | 2,349,896   | 2,510,105 | 2,865,300 | 2,635,757 | 2,500,256 |           |
| Agricultural development Policy / plan / strategy | The Costa Rican government's "Agriculture, Fisheries and Rural Sector Plan 2019-20226)" is based on the "Policy Guideline for Agriculture, Livestock, Fisheries and Rural Sector 2019-2022" and shows concrete measures. Visits are designed based on sector profiles created by each institution so that different institutions can collaborate to carry out activities and optimize resource use. |           |           |           |           |           |



|                    |  |
|--------------------|--|
|                    | <p>The plans are "Protection of agricultural assets from pests for food production and national health", "Promoting the development and revitalization of local markets in the north", "Agricultural development bridge strategy (especially for economically vulnerable farmers)". "Strengthening production activities, raising income levels)", "Institutional supply program (promoting market participation of micro-small and medium-sized enterprises)", "National plan for strengthening the avocado sector", "Organization and corporate development sector program", "Caribbean rural areas" 10 strategies of "development of environment-friendly gardening production technology for improving agricultural environmental conditions in the region", "control of the use of pesticides in conventional agriculture", "integration of producer registration system (SIREA)", and "decarbonization" Consists of activities. SIREA aims to evaluate and understand the contribution of registrants to food supply, promote cooperation between producers and markets, and help strengthen the food supply system as a whole.</p>  |
| Impact of COVID-19 | <p>COVID-19 affected world trade and exports and imports declined around the world. Even under these circumstances, the agricultural food sector increased exports, and in the case of Costa Rica, exports in this sector increased by 2.6% 7). According to Euromonitor's 2020 data8), global consumption of fresh products also increased by 6%, probably due to increasing consumer health consciousness and the development of online sales and home delivery services.</p> <p>A survey conducted by the University of Costa Rica in 2020 9) mentioned the online service for buying and selling organic agricultural products (enraizadas.com) run by more than 30 families in the country. Will improve the profits of producers by trading directly with them. " The National Horticultural Corporation (CHN) also develops a service called Farmers Box 10). Both use applications linked to existing carriers for delivery, so such services could be a new business model that benefits producers, consumers, and carriers alike.</p> <p>In the livestock sector, the Ministry of Agriculture and Agriculture (MAG) is implementing the "COVID-19 Countermeasure Plan 11)". It consists of three stages of activities, impact survey, recovery, and reconstruction, targeting small and medium-sized dairy farmers. Specific activities include "regular milk distribution to school residents by the Ministry of Education (MEP)" and " The National Milk Producers Conference, MAG, and the National Animal Hygiene Service (SENASA) work together to adjust the supply and demand of milk. " The latter is the shift from milk, which is the raw material, to milk, which has increased in demand, in line with the decrease in demand for cheese due to the closure of restaurants.</p> <p>The large stagnation of tourism due to COVID-19 also had a great impact on the fishery sector. Costa Rica's NGO Forever Association (ACRXS) 12) reports that export declines have closed part of the Fisheries Collection and Shipping Center, affecting more than 1,300 microfishermen in Guanacaste Province, on the Pacific coast. .. The Guanacaste Fishermen's Council has set up and supported an emergency collection and shipping center to sell the products of these micro-fishermen. The Fishermen's Council is preparing a plan to revitalize the fishing sector in partnership with the Costa Rica Aquaculture Research Institute (INCOPECA) and others.</p>   |
| Source / reference | <ol style="list-style-type: none"> <li>1) FAOSTAT-Land, Input and Sustainability-Land Use-Area-Agriculture (<a href="https://www.fao.org/faostat/en/#data/RL">https://www.fao.org/faostat/en/#data/RL</a>)</li> <li>2) FAOSTAT- Share of employment in agriculture (% of total employment) &amp; Share of female employment in agriculture (% of employment in agriculture) (<a href="https://www.fao.org/faostat/en/#data/OE">https://www.fao.org/faostat/en/#data/OE</a>)</li> <li>3) Agriculture, forestry, and fishing, value added (constant 2015 US \$) --Latin America &amp; Caribbean (<a href="https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart">https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart</a>)</li> <li>4) FAOSTAT-Government Expenditure-Share of Total Expenditure-Central Government (<a href="https://www.fao.org/faostat/en/#data/IG">https://www.fao.org/faostat/en/#data/IG</a>)</li> <li>5) FAOSTAT-Trade-Crops and livestock products-Import / Export Value-Agricultural Products (<a href="https://www.fao.org/faostat/en/#data/TCL">https://www.fao.org/faostat/en/#data/TCL</a>)</li> <li>6) Plan Sectorial 2019-2022 Sector Agropecuario, Pesquero y Rural (<a href="http://www.sepsa.go.cr/docs/2019-010-Plan_Sectorial_2019-2022.pdf">http://www.sepsa.go.cr/docs/2019-010-Plan_Sectorial_2019-2022.pdf</a>)</li> <li>7) WTO STAT (<a href="https://stats.wto.org/">https://stats.wto.org/</a>)</li> <li>8) (<a href="https://www.euromonitor.com/">https://www.euromonitor.com/</a>)</li> <li>9) E-commerce platforms are managing to bring producers and consumers closer together in a more direct and fair relationship, 2020 (<a href="https://www.ucr.ac.cr/noticias/2020/05/16/la-agricultura-costarricense-se-reinventa-frente-a-la-pandemia-del-COVID-19.html">https://www.ucr.ac.cr/noticias/2020/05/16/la-agricultura-costarricense-se-reinventa-frente-a-la-pandemia-del-COVID-19.html</a>)</li> <li>10) Corporación Hortícola Nacional llevará frutas y hortalizas hasta su casa (<a href="https://delfino.cr/2020/04/corporacion-horticola-nacional-llevara-frutas-y-hortalizas-hasta-su-casa">https://delfino.cr/2020/04/corporacion-horticola-nacional-llevara-frutas-y-hortalizas-hasta-su-casa</a>)</li> <li>11) MAG DISEÑA PLAN DE ACCIÓN Y ATENCIÓN POR COVID-19 PARA SECTOR LECHERO (<a href="https://www.presidencia.go.cr/comunicados/2020/04/mag-disena-plan-de-accion-y-atencion-por-COVID-19-para-sector-lechero/">https://www.presidencia.go.cr/comunicados/2020/04/mag-disena-plan-de-accion-y-atencion-por-covid-19-para-sector-lechero/</a>)</li> <li>12) Relief for Guanacaste fishermen amid COVID emergency-19 (<a href="https://costaricaporsiempre.org/en/noticias/alivio-para-pescadores-de-guanacaste-en-medio-de-emergencia-por-COVID-19/">https://costaricaporsiempre.org/en/noticias/alivio-para-pescadores-de-guanacaste-en-medio-de-emergencia-por-COVID-19/</a>)</li> </ol> |

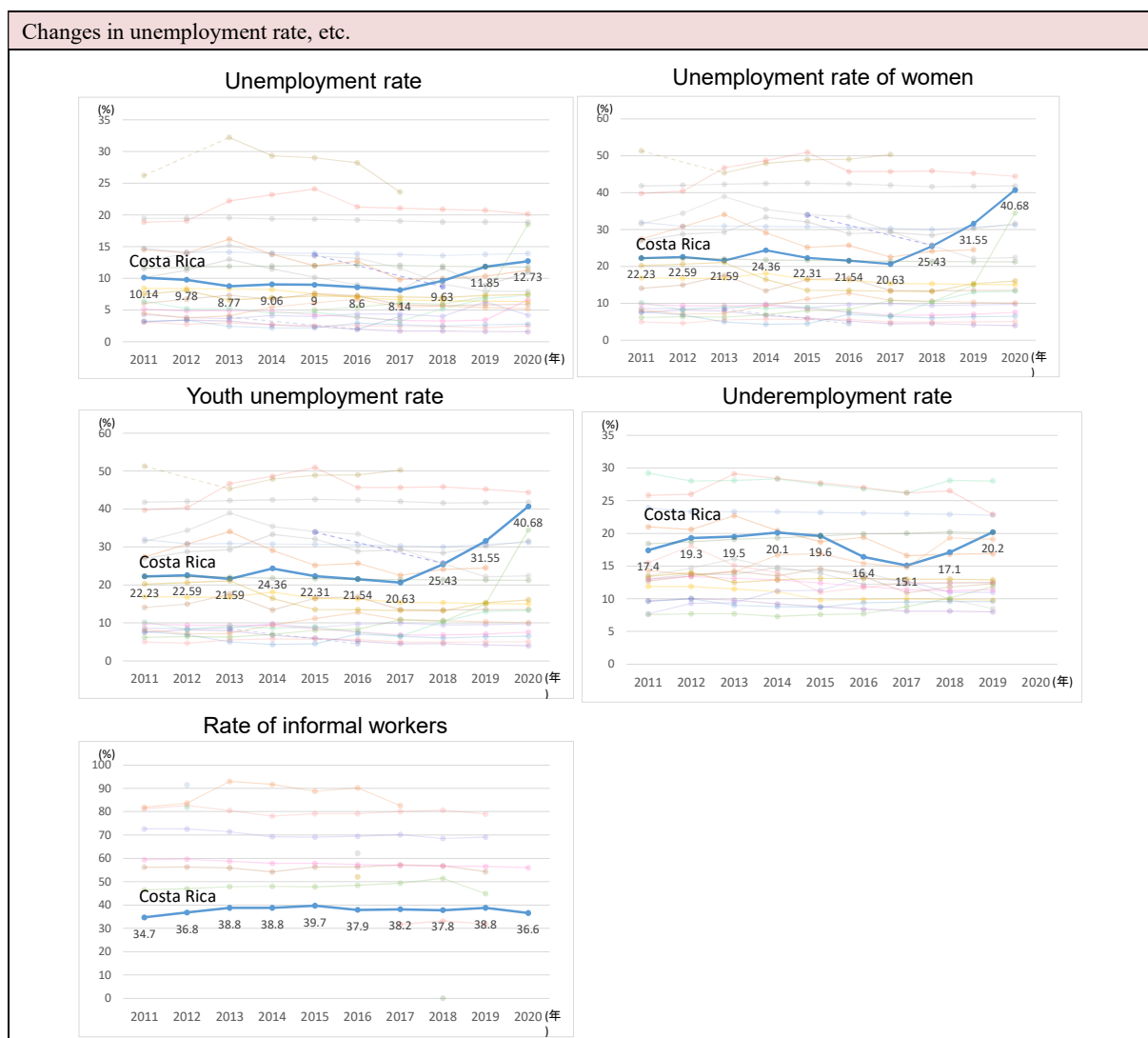
### 5.3.4 Private sector

Costa Rica is a country with large economy (6th) and high GDP per capita (7th). The minimum wage is also high (5th). Although the informal worker rate is nearly 40%, it is very low (2nd) in the region. On the other hand, the unemployment rate is poor, especially the youth unemployment rate is over 30%. The unemployment rate has deteriorated since 2017, especially the female unemployment rate and the youth unemployment rate.



|              | Index                      | Value  | Ranking                 | Year | Source     |
|--------------|----------------------------|--------|-------------------------|------|------------|
| Productivity | GDP per capita (USD)       | 12,077 | 7 (Among 22 countries)  | 2020 | World Bank |
|              | GDP per worker (USD)       | 44,648 | 6 (Among 18 countries)  | 2019 | World Bank |
| Employment   | Minimum wage (USD / month) | 476    | 5 (Among 23 countries)  | 2019 | ILO        |
|              | Unemployment rate          | 11.85  | 17 (Among 22 countries) | 2019 | Statista   |
|              | Female unemployment rate   | 15.3   | 17 (Among 22 countries) | 2019 | CEPAL      |
|              | Youth unemployment rate    | 31.55  | 19 (Among 22 countries) | 2019 | CEPAL      |
|              | Underemployment rate       | 20.2   | 15 (Among 18 countries) | 2019 | ILO        |
|              | Informal worker rate       | 38.8   | 2 (Among 12 countries)  | 2019 | CEPAL      |

Source: Described in the table



Source: World Bank, ILO, The Global Economy, etc.

### 5.3.5 Environment / Disaster Management

|             | item   | data  | remarks                           |
|-------------|--|---|-----------------------------------|
| Environment | Environmental agency                                     | Ministerio de Ambiente y Energía  |                                   |
|             | Waste-related organizations                              | Municipalities  |                                   |
|             | Environmental Budget (USD)                               | 2019: 86,595<br>2020: 127,663<br>2021: 92,876<br>Three-year average:<br>102,378 | Average: 16th out of 23 countries |
|             | Environmental budget per capita (2019-2021 average, USD) | 0.02  | 16th out of 23 countries          |
|             | Budget ratio to national budget (2019)                   | —   |                                   |

|                     |  |  |                          |
|---------------------|--|--|--------------------------|
|                     | Donor support status                               | 12 cases   | As of May 2021           |
|                     | Renewable energy power generation (GWh) (2019)     | 274  | IRENA, 2021              |
|                     | Geothermal power generation capacity (MWe)         | 2020: 262.00<br>2025 Forecast: 262.00                                      | WGC, 2020                |
| Disaster Management | Disaster prevention organization                   | National Comission of Risks Prevention and Emergenct Care Costa Rica (CNE) |                          |
|                     | Donor support status                               | 3 cases  | As of May 2021           |
|                     | Number of natural disasters (2010-2020)            | Ten<br>Major disasters: floods, droughts, earthquakes                      |                          |
|                     | Number of victims (persons) per 100,000 population | 4,189  | 12th out of 23 countries |

Source: Survey Team

### 5.3.6 Governance and citizen security

| Item  | Overview   |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
|---|--|-----------------------------|---------|----------------------------|----------------------------|--------------------------|-----------------------------|------|-----|------|-----|------|-----|------------|------|-----|------|-----|------|-----|---|-----------------------------|------|-----|------|-----|------|-----|------------|------|-----|------|-----|------|-----|--------------------------|-----------------------------|------|-----|------|-----|------|-----|------------|------|-----|------|-----|------|-----|--------------------|-----------------------------|------|-----|------|-----|------|-----|------------|------|-----|------|-----|------|-----|-------------|-----------------------------|------|-----|------|-----|------|-----|------------|------|-----|------|-----|------|-----|-----------------------|-----------------------------|------|-----|------|-----|------|-----|------------|------|-----|------|-----|------|-----|
| Political system                              | Presidential Republic. A stable democracy since 1975.  |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
| Election system                               | Free and competitive regular elections are held. The President and Vice President are elected by direct voting at the same time. The term of office is four years. Re-election is possible if it is not continuous.  |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
| Legislative system                            | Unicameral   |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
| Most recent / next legislative election       | February 4, 2018 (Next time scheduled for February 6, 2022)  |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
| Judicial system Appointment and term of judge | Judges of the Supreme Court are elected by the National Assembly. The term of office is eight years.   |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
| Political stability                           | Stable for the last 20 years   |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
| "Worldwide Governance Indicators"             | <p>All governance indicators are above the regional average.</p> <table border="1"> <caption>Worldwide Governance Indicators Percentile Rank Data</caption> <thead> <tr> <th>Indicator</th> <th>Country</th> <th>Year</th> <th>Percentile Rank (0 to 100)</th> </tr> </thead> <tbody> <tr> <td rowspan="6">Voice and Accountability</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~60</td> </tr> <tr> <td>2019</td> <td>~60</td> </tr> <tr> <td>2020</td> <td>~60</td> </tr> <tr> <td rowspan="3">Costa Rica</td> <td>2010</td> <td>~75</td> </tr> <tr> <td>2019</td> <td>~75</td> </tr> <tr> <td>2020</td> <td>~75</td> </tr> <tr> <td rowspan="6">Political Stability and Absence of Violence/Terrorism</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Costa Rica</td> <td>2010</td> <td>~70</td> </tr> <tr> <td>2019</td> <td>~70</td> </tr> <tr> <td>2020</td> <td>~70</td> </tr> <tr> <td rowspan="6">Government Effectiveness</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Costa Rica</td> <td>2010</td> <td>~70</td> </tr> <tr> <td>2019</td> <td>~70</td> </tr> <tr> <td>2020</td> <td>~70</td> </tr> <tr> <td rowspan="6">Regulatory Quality</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Costa Rica</td> <td>2010</td> <td>~70</td> </tr> <tr> <td>2019</td> <td>~70</td> </tr> <tr> <td>2020</td> <td>~70</td> </tr> <tr> <td rowspan="6">Rule of Law</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Costa Rica</td> <td>2010</td> <td>~70</td> </tr> <tr> <td>2019</td> <td>~70</td> </tr> <tr> <td>2020</td> <td>~70</td> </tr> <tr> <td rowspan="6">Control of Corruption</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Costa Rica</td> <td>2010</td> <td>~70</td> </tr> <tr> <td>2019</td> <td>~70</td> </tr> <tr> <td>2020</td> <td>~70</td> </tr> </tbody> </table> | Indicator                   | Country | Year                       | Percentile Rank (0 to 100) | Voice and Accountability | * Latin America & Caribbean | 2010 | ~60 | 2019 | ~60 | 2020 | ~60 | Costa Rica | 2010 | ~75 | 2019 | ~75 | 2020 | ~75 | Political Stability and Absence of Violence/Terrorism | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Costa Rica | 2010 | ~70 | 2019 | ~70 | 2020 | ~70 | Government Effectiveness | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Costa Rica | 2010 | ~70 | 2019 | ~70 | 2020 | ~70 | Regulatory Quality | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Costa Rica | 2010 | ~70 | 2019 | ~70 | 2020 | ~70 | Rule of Law | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Costa Rica | 2010 | ~70 | 2019 | ~70 | 2020 | ~70 | Control of Corruption | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Costa Rica | 2010 | ~70 | 2019 | ~70 | 2020 | ~70 |
|   | Indicator  | Country                     | Year    | Percentile Rank (0 to 100) |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
|   | Voice and Accountability   | * Latin America & Caribbean | 2010    | ~60                        |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
|   |  |                             | 2019    | ~60                        |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
|   |  |                             | 2020    | ~60                        |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
|   |  | Costa Rica                  | 2010    | ~75                        |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
|   |  |                             | 2019    | ~75                        |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
|   |  |                             | 2020    | ~75                        |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
|   | Political Stability and Absence of Violence/Terrorism  | * Latin America & Caribbean | 2010    | ~55                        |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
|   |  |                             | 2019    | ~55                        |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
| 2020  |  |                             | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
| Costa Rica                                    |  | 2010                        | ~70     |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
|   |  | 2019                        | ~70     |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
|   |  | 2020                        | ~70     |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
| Government Effectiveness                      | * Latin America & Caribbean  | 2010                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
|   |  | 2019                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
|   |  | 2020                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
|   | Costa Rica   | 2010                        | ~70     |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
|   |  | 2019                        | ~70     |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
|   |  | 2020                        | ~70     |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
| Regulatory Quality                            | * Latin America & Caribbean  | 2010                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
|   |  | 2019                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
|   |  | 2020                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
|   | Costa Rica   | 2010                        | ~70     |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
|   |  | 2019                        | ~70     |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
|   |  | 2020                        | ~70     |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
| Rule of Law                                   | * Latin America & Caribbean  | 2010                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
|   |  | 2019                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
|   |  | 2020                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
|   | Costa Rica   | 2010                        | ~70     |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
|   |  | 2019                        | ~70     |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
|   |  | 2020                        | ~70     |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
| Control of Corruption                         | * Latin America & Caribbean  | 2010                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
|   |  | 2019                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
|   |  | 2020                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
|   | Costa Rica   | 2010                        | ~70     |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
|   |  | 2019                        | ~70     |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
|   |  | 2020                        | ~70     |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
| Global freedom status                         | 91/100 points (citizen rights: 38/40 points, political rights: 53/60 points)<br>Classified as "free country" (Freedom House 2021)  |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
| Corruption Perception Index (CPI)             | 42/180 (4th in Central America / Caribbean), 57/100 (Transparency International 2020).   |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |
| E-government                                  | With the highest index in Central America, Costa Rica is one of the countries in Central and   |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |            |      |     |      |     |      |     |

|                   |   |
|-------------------|---|
| development index | South America where digitalization is rapidly developing. The country's digitalization strategy will focus on human capital and show a move to integrate efforts towards digitalization among various government agencies. Digital national IDs have been issued, and their penetration rate is the highest among Central American countries. |
| Rule of law       | According to WGI, the indicator of "rule of law" is much higher than the regional average.  |
| Citizen Security  | The homicide rate is the lowest in Central America. The homicide rate in 2018 was 11.3 / 100,000 (28.1 in Central America and 5.8 in the world in the same year) (UNODC 2021).  |
| others            | More than 77,000 Nicaraguans (as of March 2020) have fled to Costa Rica due to the political and social turmoil in Nicaragua in 2018, raising concerns about their vulnerability.   |

Source: Survey Team

### 5.3.7 DX / Innovation

|   |   |   |
|---|---|---|
| Basic indicators and statistics   | E-Government Ranking <sup>1)</sup> : 56th                         | Radar chart of e-government ranking<br> |
|   | Mobile connection index <sup>2)</sup> : 67.6                      |   |
|   | Network Infrastructure Index: 65.9                                |   |
|   | Internet user rate 81.2   |   |
|   | Mobile connection rate 174.4                                      |   |
|   | Fixed broadband rate 17.9   |   |
|   | Rate of increase in the number of Internet users (2021/2020) 10.6 |   |
| <b>Communication network</b>  |   |   |
| <p>Due to the conclusion of a free trade agreement (FTA) with the United States in 2006<sup>3)</sup>, the monopoly of telecommunications by the state-owned enterprise ICE has ended in the telecommunications sector, and although it has been growing significantly since 2016, The share of GDP in GDP is 2.4% (2016), 2.3% (2017), 2.2% (2018), 2.1% (2019) <sup>4)</sup>, and its growth level is lower than that of other sectors. ICE is still a major provider of fixed-line services (90.6%), but in the mobile market <sup>5)</sup>, Kolbi (ICE) 41.1%, Claro (América Móvil) 20.3%, Movistar (Liberty Latin America) 38.6% and foreign capital. Competition is intensifying due to the entry of companies. Although the number of fixed-line lines has decreased due to the increase in fixed-line telephone charges in 2014, the ratio of revenue from fixed-line telephone services including VoIP in the telecommunications sector has been 12.0% (2016) due to the increase in consumption of VoIP services. It has been on a 1% declining trend, and the sharp decline has been mitigated <sup>4)</sup>.</p> <p>Mobile sector revenue is the largest and maintains 65% of the total, but while growth is stagnant, fixed broadband revenue <sup>4)</sup> has been strong in recent years from 15% (2016) to 23% (2020) of the total. It is one of the few growth sectors in the telecommunications sector. The national fiber network expanded significantly (56%) from 112,938 km in 2019 to 2020, reaching 176,203 km <sup>4)</sup>. It is expected that competition will intensify as broadband data costs fall in the future.</p> <p>The deployment of 5G network infrastructure in Costa Rica has been delayed due to COVID-19 measures regulations, and it is unlikely that the service will start before 2023 due to issues such as appropriate spectrum allocation <sup>6)</sup>.</p> |   |   |
| <b>National Strategy for Digital Transformation</b>   |   |   |
| <p>The National Telecommunications Development Plan 2015-2021 (PNDT) <sup>7)</sup> and Digital Transformation Strategy 2018-2022<sup>8)</sup> set out national digital transformation policies. PNDT will strengthen coordination capabilities within and between telecommunications agencies, 1) digital inclusion; infrastructure development for universal access, ensuring universal access to telecommunications services, and 2) transparency. Electronic government; aiming to provide transparent and efficient administrative services with citizen participation, 3) Digital economy; promoting new businesses and accessing digital technology by developing products, products, services, digital contents, and innovative ideas. With the three pillars of pursuing socio-economic affluence through expansion, each program for achieving the goals for a more innovative country is clarified.</p> <p>The DX strategy revolves around the following four main themes. 1) Industry 4.0 and Knowledge Society; Productivity transformation through the development of AI, data science, nanotechnology, biotechnology, bioengineering, IoT, blockchain, 5G, geographic information system (GIS), Big Data, 2) digital Smart government; speeding up appropriate policy decisions by utilizing the latest technology, developing digital services that meet the needs of citizens and companies 3) Comprehensive, integrated, secure digital services; providing digital services at reasonable prices, government Information sharing and service integration within the organization, stricter data storage, 4) Human resources and financial resources; Securing human resources with expertise and financial resources for organizational and institutional capacity building</p>   |   |   |
| <b>Characteristic efforts</b>   |   |   |
| <p>In 1999, the Costa Rica Social Security Fund (CCSS) began telemedicine as a general means of medical counseling as the first program in Latin America, and in 2017 created a new manual, now called Telehealth. Established regulations such as agenda preparation, reference evaluation, and process standardization. In 2019, some of the CCSS enrollments will be moved under the control of Single Digital Health Record <sup>9)</sup> (EDUS), making patient records remotely accessible. As a countermeasure against COVID-19, we are promoting the expansion and efficiency of access to digital files, and evolving remote diagnosis with tools that require the functions of telephone consultation and the generation of drug prescriptions <sup>10)</sup>. Prescription delivery is linked to the postal or private home delivery business.</p> <p>Costa Rica has also joined the list of more than 60 countries that enable the COVID-19 contact notification service created</p>  |   |   |

by Google and Apple. Through an application called Digital Mask <sup>11)</sup>, you will be notified when a person with a positive diagnosis approaches live, and if the person has a positive reaction, all contacts who have been nearby in the last 10 days will be notified. Being notified and supporting proactive risk aversion and voluntary quarantine measures.

| source |   |
|--------|---|
| 1.     | E-Gov-Index: a composite indicator that consists of three indexes (Online Service Index, Telecommunication Infrastructure Index and Human Capital Index), which are equally weighted. It ranges from 0 to 1, with 1 being the most developed.   |
| 2.     | Mobile Connectivity Index: an input index developed by GSMA to measure the performance against the four key enablers of mobile internet adoption – infrastructure, affordability, consumer readiness and content. ( <a href="https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2016/06/Mobile-Connectivity-Launch-Report.pdf">https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2016/06/Mobile-Connectivity-Launch-Report.pdf</a> ) |
| 3.     | Estados Unidos y Costa Rica (TLC)<br><a href="https://tlc.estadonacion.or.cr/documentos/pdfs/64Jimenez2004.pdf">https://tlc.estadonacion.or.cr/documentos/pdfs/64Jimenez2004.pdf</a>  |
| 4.     | sutel_informe_estadistico_2020_digital<br><a href="https://www.sutel.go.cr/sites/default/files/sutel_informe_estadistico_2020_digital.pdf">https://www.sutel.go.cr/sites/default/files/sutel_informe_estadistico_2020_digital.pdf</a>   |
| 5.     | PANORAMA DE MERCADO --COSTA RICA<br><a href="https://www.telesemana.com/panorama-de-mercado/costa-rica/">https://www.telesemana.com/panorama-de-mercado/costa-rica/</a>   |
| 6.     | SIICE: Injustificado atraso en el despliegue de la red 5G<br><a href="https://www.siicec.org/cms/index.php/noticias/121-siice-injustificado-atraso-en-el-despliegue-de-la-red-5g-2">https://www.siicec.org/cms/index.php/noticias/121-siice-injustificado-atraso-en-el-despliegue-de-la-red-5g-2</a>  |
| 7.     | National Telecommunications Development Plan 2015-2021 <a href="https://www.micit.go.cr/sites/default/files/pndt_2015-2021_english_version_web_1_0.pdf">https://www.micit.go.cr/sites/default/files/pndt_2015-2021_english_version_web_1_0.pdf</a>  |
| 8.     | Digital Transformation Strategy towards the Costa Rica of Bicentennial 4.0 2018-2022<br><a href="http://observatorioplanificacion.cepal.org/sites/default/files/plan/files/Costa%20Rica%20PNDIP%20%202019-2022.pdf">http://observatorioplanificacion.cepal.org/sites/default/files/plan/files/Costa%20Rica%20PNDIP%20%202019-2022.pdf</a>   |
| 9.     | Expediente Digital Único en Salud<br><a href="https://www.ccss.sa.cr/edus/">https://www.ccss.sa.cr/edus/</a>  |
| 10.    | Juliana Salas Segura, Telemedicina en tiempos de Pandemia: una medida necesaria que debe prolongarse más allá del COVID-19<br><a href="https://www.scielo.sa.cr/scielo.php?pid=S1409-41422020000300023&amp;script=sci_arttext">https://www.scielo.sa.cr/scielo.php?pid=S1409-41422020000300023&amp;script=sci_arttext</a>   |
| 11.    | Salud y MICITT lanzan sistema de notificación de contactos COVID-19 creado por Google y Apple<br><a href="https://www.ministeriodesalud.go.cr/mascarilladigital/faqs.html">https://www.ministeriodesalud.go.cr/mascarilladigital/faqs.html</a>  |

### 5.3.8 Infrastructure and Energy

| Transport                                 |   |
|---|---|
| Overview                                  | Inland transportation is mainly by car.<br>The main public transportation is buses and taxis, and there is also a railroad (516km). Railroads in metropolitan areas operate as city trains for passengers. There are several domestic air routes. |
| Leadership governance                     | Ministry of Public Works and Transportation (MOPT)<br>Vice Ministry of Transport and Safety   |
| Major development partners                | IADB / GIZ  |
| Energy and electricity                    |   |
| Overview                                  | About half of the primary energy is imported as fossil fuel, but almost 100% of the electricity is renewable mainly by hydropower and geothermal power.   |
| Carbon neutral national plan              | National decarbonization plan<br>Goals: Fully renewable energy system and zero emissions of public transport by 2050  |
| Leadership governance and utility company | Ministry of Environment and Energy (MINAE)<br>Costa Rican Electricity Institute (ICE)   |
| Major development partners                | UNDP / IADB / GIZ   |

Source: JICA Study Team with reference to various websites of the government organization and international organization (WB / IEA / IRENA / US DOE).

### 5.3.9 Tourism

One of the three countries in the world that have lifted all immigration restrictions related to COVID-19<sup>8</sup>

|   |  |   |
|---|--|---|
| Number of international tourist arrivals (2019) |  | 3,139 thousand  |
| International Tourism Receipts (2019)           |  | USD 4,010 million   |
| Tourism Competitiveness Ranking (2019)          |  | 4.3 out of 7 (41st out of 140 countries)<br>Highly rated field: Natural resources (4.9 out of 7 points, 8th out of 140 countries)<br>Low evaluation field: Price competitiveness (5.1 out of 7 points, 93rd out of 140 countries) |
| Tourism Dependency Index (2019)                 |  | 13.8 (54th out of 166 countries)  |
| Government of Japan policy                      | Number of JICA projects in the last 10 years | none  |
|   | References to the Country Assistance Policy  | none  |
|   | Interest in pilot projects                   | N / A   |

<sup>8</sup>As of June 1, 2021.

|  |  |   |
|--|--|---|
| Tourism industry vulnerability                               | Contribution of Travel & Tourism to GDP (2019)   | 12.0% (14th out of 23 countries)  |
|  | Contribution of Travel & Tourism to employment (2019)  | 11.7% (15th out of 23 countries)  |
|  | Ratio of international spending (2019)   | 68% (13th out of 23 countries)  |
|  | Top 3 nationalities of visitors (2019)   | USA (42.52%)<br>Nicaragua (13.22%)<br>Canada (7.47%)  |
| Importance of tourism  | Ratio of the budget amount of tourism-related ministries to the national budget amount (2019)            | N / A   |
|  | Whether or not it is mentioned as a priority sector in the National Economic and Social Development Plan | Yes<br>Plan name: Plan Nacional de Desarrollo y de Inversión Pública del Bicentenario 2019-2022<br>Reference example: Áreas Estratégicas de Articulación Presidencial 1. Innovación Competitividad y Productividad 11. Turismo (p. 118) |
|  | Existence of effective national tourism policies / strategies / plans                                    | Yes (Plan Nacional de Desarrollo Turístico de Costa Rica 2017-2021)   |
| Impact of COVID-19   | Changes in the contribution of Travel & Tourism to GDP (2019 → 2020)                                     | -56.2% (14th out of 23 countries)   |
|  | Changes in the contribution of Travel & Tourism to employment (2019 → 2020)                              | -27.5% (10th out of 23 countries)   |
| Number of government support measures for the tourism sector |  | 26 (Fiscal policy: 7, monetary policy: 7, employment and skills: 4, resumption of tourism: 1, health and safety protocol: 1, domestic travel: 5, others: 1)   |

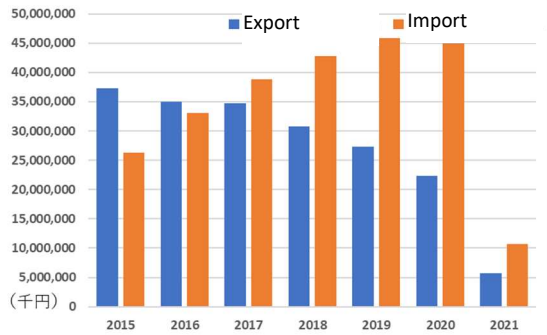
Source: Survey Team

### 5.3.10 Public-private partnership

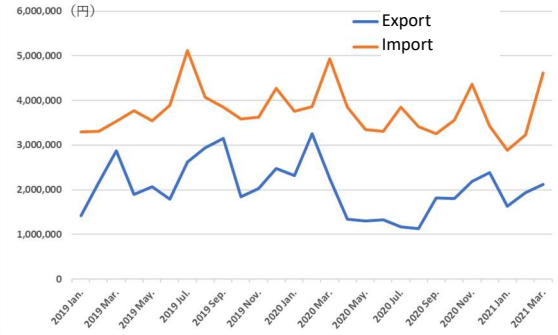
|  | item   | Contents     |
|--|--|--------------|
| No. of JICA Public-Private Partnership Projects (After 2012)                 | Cooperation preparatory survey (overseas investment and financing) (former PPP infrastructure project)           | 0 cases      |
|  | Overseas investment and loan   | 0 cases      |
|  | SME Partnership Promotion Survey (support for Small-sized Enterprise)  | 0 cases      |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for small- and medium- sized enterprise) | 1            |
|  | SDGs Business Verification Survey with Private Sector (support for small- and medium- sized enterprise)          | 0 cases      |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for large enterprise)                    | 0 cases      |
|  | SDGs Business Verification Survey with Private Sector (support for large enterprise)                             | 0 cases      |
| Total number of Japanese private companies entering the market (2019 survey) | Total number of business locations   | 32 companies |
|  | Overseas branches of Japanese companies,   | 2 companies  |
|  | Local corporations wholly owned by Japanese companies and their branches   | 7 companies  |
|  | Branch offices wholly owned by Japanese companies and their branches   | 8 companies  |
|  | joint ventures (local corporations in which Japanese companies have a direct or indirect stake of 10% or more)   | 0 companies  |
|  | joint ventures (Branch offices in which Japanese companies have a direct or indirect stake of 10% or more)       | 0 companies  |
|  | companies established overseas by Japanese nationals (in which Japanese nationals have a stake of 10% or more)   | 15 companies |
|  | Unknown classification   | 0 companies  |
| Number of Japanese residents (2020 survey)                                   | Total  | 424 people   |
|  | Long-term residents  | 307 people   |
|  | Permanent resident   | 117 people   |
| Business Environment   | Doing Business 2020 Rank   | 74th place   |
| PPP Project  | Existence of PPP law scheme  | ○            |
|  | PPP project with Japanese companies  | 1            |

Trade trends with Japan

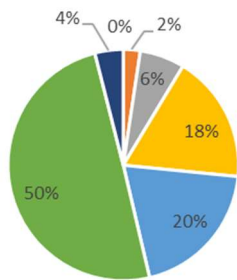
Total import / export (annual transition)  
Blue – Export / Orange - Import



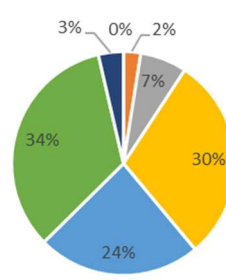
Total import / export (monthly transition)  
Blue – Export / Orange - Import



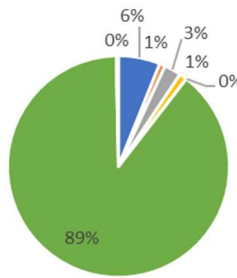
Export items (2019)



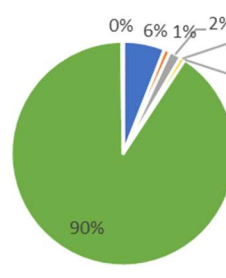
Export items (2020)



Imported items (2019)



Imported items (2020)



## Gathering information about the PPP system

| N°  | Task Item   | Inquiries/comments/status<br>Title of submitted file  | Source/URL  |
|-----|---|---|---|
| 1   | <b>PRIORITY 4_PPP Sector</b>  |   |   |
| 1.1 | PPP Projects in selective countries<br>PPP rules and regulations in Central America and Caribbean Countries |   | All below can be useful   |
| A   | PPP laws and Regulations<br>If there is any, when, and how  | Proyecto de Ley nacional para el desarrollo, fomento y gestión de las Alianzas público privadas   | <a href="http://www.camtic.org/wp-content/uploads/2019/10/EXPEDIENTE21420.pdf">http://www.camtic.org/wp-content/uploads/2019/10/EXPEDIENTE21420.pdf</a>   |
| B   | PPP Unit Organization<br>If there is any, how structured  | Consejo Nacional de Concesiones de Costa Rica   | <a href="https://www.cnc.go.cr/quienes-somos/orgnigram">https://www.cnc.go.cr/quienes-somos/orgnigram</a>   |
| C   | PPP sectors<br>In what sectors are the PPPs allowed   | Any sector is allowed (see article 5 of the National Law for the development, promotion and management of Public-Private Partnerships Draft - Page 7) | <a href="http://www.camtic.org/wp-content/uploads/2019/10/EXPEDIENTE21420.pdf">http://www.camtic.org/wp-content/uploads/2019/10/EXPEDIENTE21420.pdf</a>   |
| D   | Proposal Types (Solicited or Unsolicited)<br>unsolicited  | There is information about the Solicited proposals but no information was found on unsolicited  |   |
| E   | PPP Forms<br>BOT, BTO, DB, ..., what form are allowed   | The PPP forms with data available:<br>- BLT<br>- BOO<br>- BOT<br>- BROT<br>- ROT<br><br>See file "210520_PPP Database" sheet "Resume PPP"             | <a href="https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true">https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true</a> |
| F   | PPP types<br>Availability payment, service purchase   | There is no public information on the subject.  |   |
| G   | PPP Project Trends<br>how much PPP projects in the last 10 years  | 9 (2010 to 2020)<br><br>See file "210520_PPP Database"  | <a href="https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true">https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true</a> |
| H   | Participation of Japanese firms in PPP Projects<br>If any (check news source)                               | The Miravalles-3 Geothermal Power (1997), Marubeni Corp   | <a href="https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true">https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true</a> |
| I   | Any notable points for each country<br>If any   | Normativa para las alianzas público-privadas en Costa Rica  | <a href="http://www.aliarse.org/wp-content/uploads/2017/08/Antologia.pdf">http://www.aliarse.org/wp-content/uploads/2017/08/Antologia.pdf</a>   |

Source: Survey Team



## 6. Cuba

### 6.1 Country overview

#### 6.1.1 Basic information

The Republic of Cuba (Spanish: República de Cuba), commonly known as Cuba, is located in the Greater Antilles of the Caribbean (part of the West Indies) and is a socialist republic consisting of the main island of Cuba and its surrounding islands. The capital is Havana. There is a one-party system by the Communist Party of Cuba. Even now, the center of the Cuban economy is sugar and related products, but we are promoting agricultural diversification such as organic farming. Nickel is the second major export product other than sugar, and its export volume accounts for about 10% of the total export volume. In addition, exports of pharmaceutical products (hepatitis B vaccine, etc.) account for more than 10%, and service revenue from overseas dispatch of medical personnel also accounts for a large proportion. In recent years, the tourism industry has become the largest source of foreign currency in Cuba, as the number of tourists has grown at an average annual rate of 18.6% over the past few years. There have been two types of legal tender since 1994, but from January 1, 2021, they were unified into the Cuban peso (Peso Cubano). The rate is fixed at 1 US dollar = 24 pesos.

#### 6.1.2 General circumstances

|             |  |                 |   |
|-------------|--|-----------------|---|
| 1 area      | 109,884 square kilometers (about half of Honshu) | 2 Population    | Approximately 11.48 million (2017 World Bank)         |
| 3 Capital   | Havana   | 4 ethnic groups | European 25%, mixed race 50%, African 25% (estimated) |
| 5 languages | Spanish  | 6 religion      | Religion is free in principle                         |

Source: Ministry of Foreign Affairs HP Cuba Basic Data

#### 6.1.3 Economic overview

|                          |   |                              |   |
|--------------------------|---|------------------------------|---|
| 1 Major industry         | Tourism, agriculture, forestry and fisheries (sugar, tobacco, fish and shellfish), mining (petroleum, nickel, etc.), medical / bio industry   | 2 GDP<br>3 GDP / person      | \$ 96,851 Million (2017 World Bank)<br>\$ 8,433 (2017 World Bank) |
| 4 Economic growth rate   | 0.5% (2016: National Bureau of Statistics)  | 5 Unemployment rate          | 1.7% (2017: National Bureau of Statistics)                        |
| 6 Price increase rate    | 0.6% (2017: National Bureau of Statistics)  |                              |   |
| 7 Total trade amount     | Export: 14,083 million pesos (2017: National Bureau of Statistics)<br>Import: 11,309 million pesos (2017: National Bureau of Statistics)  |                              |   |
| 8 Major trade items      | Exports: Minerals (nickel), chemicals / medical products, food products (sugar, aquaculture products, fish and shellfish), tobacco<br>Imports: Fuels, machinery / transportation machinery, foodstuffs  |                              |   |
| 9 Major trading partners | Exports: Venezuela, Canada, China, Spain (2017: National Bureau of Statistics)<br>Imports: China, Venezuela, Spain, Canada (2017: National Bureau of Statistics)  |                              |   |
| 10 currencies            | Cuban pesos and convertible pesos   | 11 Foreign currency reserves | na  |
| 12 National budget       | na  | 13 External debt balance     | na  |
| 14 Economic overview     | <p>(1) Due to the collapse of the Soviet Union and Eastern Europe, the Cuban economy recorded significant negative growth in the early 1990s. To overcome the economic crisis, the Cuban government has partially introduced economic reforms based on market principles. Since 1995, the Cuban economy has shown signs of recovery, with an average growth rate of 4.6% in the latter half of the 1990s. At one point, it recorded a high growth rate due to close economic relations with Venezuela and China (12.5% (2006), 7.5% (2007)), but the growth rate due to the international economic crisis and hurricane damage. Has slowed down rapidly, and has remained at a growth rate of about 2 to 3% since 2009.</p> <p>(2) Major industries are tourism, agriculture (sugar, tobacco), mining (nickel), etc. Recently, he is also focusing on the medical field (dispatch of ophthalmologists overseas). On the other hand, problems such as widening disparities are becoming more serious in Japan.</p> <p>(3) Venezuela is currently Cuba's largest trading partner. Cuba imports about 100,000 barrels / day of</p> |                              |   |

|  |   |
|--|---|
|  | <p>crude oil from Venezuela on favorable terms, while increasing revenues from providing medical services to Venezuela. In recent years, due to the deterioration of the Venezuelan economy due to the decline in crude oil prices, exports of crude oil from Venezuela to Cuba have decreased, affecting the Cuban economy.</p> <p>(4) The estimated oil reserves of the Gulf of Mexico offshore oil field are 4.6 billion barrels (US Geological Survey). Oil companies from Spain, Norway, Venezuela, Russia, India, Vietnam, Malaysia, Brazil, etc. have entered the oil field block, and trial drilling started in May 2012, but has not been successful until now.</p> <p>(5) Since the inauguration of Chairman Raul Castro, there have been movements for liberalization such as possession of prepaid mobile phones, sales of electrical products such as DVDs, and lifting of the ban on hotel accommodation. There is a movement of decentralization to have.</p> <p>(6) Regarding relations with Japan, a basic agreement was reached with Private Debt Risks in March 1998. Regarding public debt, although a rescheduling agreement was reached on short-term debt in October 2008, underwriting of trade insurance was suspended in August 2010 due to the delay in payment again, but a re-risk agreement was reached in May 2013. Resumed underwriting of trade insurance from July of the same year. Regarding medium- to long-term public debt, Japan held trade insurance claims, which are non-ODA claims, but there was no repayment at the end of November 1986, and delinquency occurred. Following the Paris Club agreement on measures to resolve delinquent debt to Cuba in December 2015, a letter was exchanged between Japan and Cuba in September 2016 for debt relief measures, and debt repayment was agreed.</p> <p>(8) The Foreign Investment Law of 1982 enabled foreign companies to conduct joint ventures with Cuba, and in September 1995, the Foreign Investment Law was enacted to allow 100% foreign investment. Investment in fields such as hotels, mining, and oil refining is progressing, with Spain and Canada at the top. Nearly 400 joint ventures were in operation in 2002, but have been declining since then. In June 2014, the new Foreign Investment Law, which stipulates the protection of foreign investment and the special tax system for foreign investment, came into effect. It is actively attracting foreign capital, such as by establishing the Mariel Development Special Zone.</p> |
|--|---|

Source: Ministry of Foreign Affairs HP Cuba Basic Data

## 6.1.4 Country-specific development cooperation policy

### (1) Government of Japan Development Cooperation Policy by Country

**Table 6-1 Overview of Japan's ODA to Cuba**

|                                      |  |
|--------------------------------------|--|
| 1. 1. Overview                       | <p>Japan's economic cooperation with Cuba began in 1960 with the acceptance of trainees. Since 1998, Grant-in-Aid for Grant-in-Aid for Grassroots and Human Security has been implemented mainly in the fields of agriculture, forestry and fisheries, medical care / health, and civilian environment. Changes in international affairs such as movements to improve relations between the two countries, development of bilateral relations through the 400th anniversary of Japan-Cuba exchange in 2014, and the need for cooperation to overcome various issues facing the Cuban people. As a result of comprehensive consideration, when Foreign Minister Kishida visited Cuba in May 2015, which was the first time for Japan's Foreign Minister, he announced that he would start full-scale grant-in-aid for aid, which had not been implemented until now. In addition, when Prime Minister Abe visited Cuba in September 2016, he signed an exchange letter for the first full-scale grant-in-aid for aid project, and in March 2017, he continued to sign agricultural equipment and waste collection equipment.</p> <p>Concluded two exchanges of grant-in-aid for aid related to the provision of such funds. Regarding technical cooperation, the technical cooperation project started in 2007, and the technical cooperation agreement was signed in 2009. Cuba has not been able to join the World Bank and the IMF due to opposition from the United States.</p> |
| 2. 2. Aim of development cooperation | <p>Cuba, which has the largest land area and population in the Caribbean region, is a socialist nation that has been established by the Cuban Revolution in 1959 and has abundant natural resources such as nickel and human resources with a high literacy rate. Has the potential to achieve economic growth in the future. On the other hand, Cuba faces a serious shortage of supplies and funds due to the ongoing sanctions of the United States, and faces many development challenges. Continued economic cooperation with Cuba will help solve the country's problems, build good bilateral relations, and support Japanese companies considering expanding into Cuba. It is also significant from that.</p>  |
| 3. 3. Basic policy                   | <p>The basic policy is to support sustainable development. Based on the track record of Japan's support for Cuba centered on "increased food production" and "environmental conservation", "agricultural development" and "sustainable" for future more comprehensive efforts. Support mainly in the field of "social and economic development".</p>   |
| 4. Priority areas                    | <p>(1) Agricultural development: In order to improve the food self-sufficiency rate, which is a priority issue for Cuba, Japan has been supporting the increase in food production through agriculture, such as increasing the production of rice, which has been the center of support, and from the viewpoint of food security. Since it is necessary to improve the productivity of various foods, we will support agricultural development including livestock and fisheries as well as agriculture.</p> <p>(2) Sustainable social and economic development: In addition to the environmental conservation and climate change fields that Japan has provided support for sustainable development, it is currently a priority issue for Cuba and is a climate</p>   |

change countermeasure. We will provide support for the renewable energy field, which also contributes to the medical and health fields, where public-private partnership cooperation can be expected, and the development of socio-economic infrastructure.

Source: Ministry of Foreign Affairs HP Cuba Country Data Collection 2017

**Table 6-2 National Development Cooperation Policy for Cuba (September 2018)**

| 3. 3. Priority field (medium goal)               |   |
|--|---|
| (1) Agricultural development                     | In order to improve food productivity, which is a priority issue for Cuba, in addition to support for increasing rice production, which Japan has been the center of support, we will provide support for improving the productivity of various foods.  |
| (2) Health care                                  | While Cuba boasts a high level of medical technology, the development and modernization of medical equipment has been delayed, and we will support efforts in the medical field that contribute to solving such problems.   |
| (3) Environmental protection                     | We will mainly support the environmental protection fields that Japan has provided so far, such as waste treatment.   |
| (4) Development of socio-economic infrastructure | We will support the improvement of aging and underdeveloped transportation infrastructure and the introduction and promotion of renewable energy, which is a priority of the Cuban government. In addition, we will support the development of social infrastructure that contributes to improving the quality of life of people. |

Source: Survey Team

## (2) Survey on COVID-19 by development partners

We extracted sector names and specific quantitative figures that have a large impact on the country-specific analysis described in various reports of development partners. Reports from the World Bank, OECD, BCIE, SICA, and the Ministry of Economy, Trade and Industry of Japan suggest the importance of introducing digitalization and innovation (Fintech, Aggrotech, Autotech, etc.), and incorporate the survey results of these development partners. I arranged it accordingly.

World Bank: "Growth and Revitalization" 2021 Semi-Annual Economic Report (March 2021)

- ✓ OECD: COVID-19 in LAC, Regional socio-economic implications and policy priorities (December 2020)
- ✓ BCIE: Impacto Económico del COVID-19 (April 2020)
- ✓ SICA: Estimación del Impacto Económico del COVID-19 en Centroamérica y República Dominicana (April 2020)
- ✓ Ministry of Economy, Trade and Industry of Japan: "Economic and Industrial Policy Based on the Impact of the New Corona Virus" (June 2020), Accelerating Digitization and Onlineization, Gig Economy, Innovation in the Transition to a New Everyday Life 1) Medical care / health, 2) Digital: Infrastructure development premised on the arrival of a digital society, 3) Green: Response to climate change problems, Energy security, 4) Emphasizes resilience.

### 6.1.5 Policies for COVID-19 measures taken by governments of each country

Various policies for COVID-19 taken by the government are described on the ECLAC homepage "COVID-19 Observatory" by country, time series, and field, and can be analyzed.



Follow-up of the evolution of COVID-19 Measures

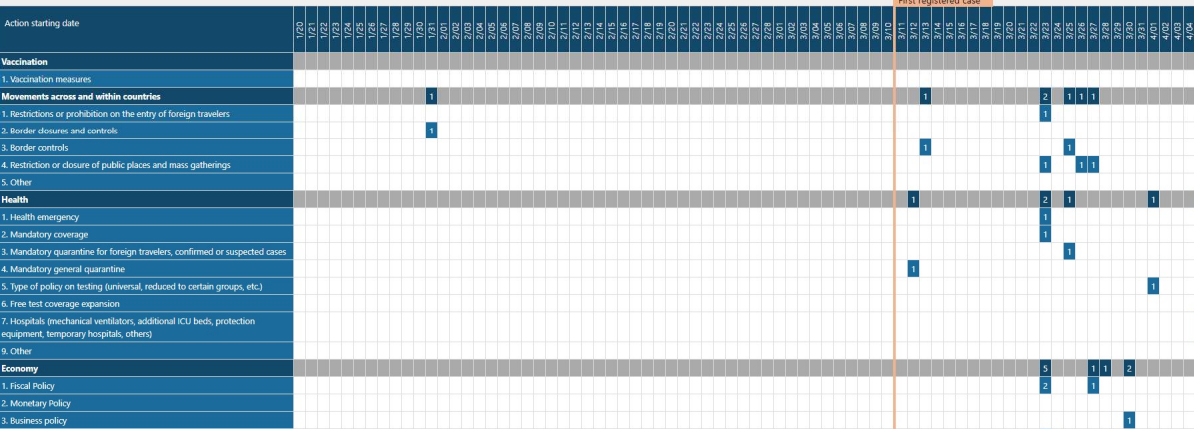
Measures details

Timeline

Cuba

Export Report to E

Date of last update: 2021-04-09 | Date of the first registered case: 2020-03-11 | Number of measures: 105



Source: <https://cepalstat-prod.cepal.org/forms/covid-countrysheet/index.html?table=2&country=CUB>

In this survey, the 54 policies implemented in Cuba posted on this website are classified by sector as much as possible.

**1) Infection spread and alleviation of aggravation and death**

No material was available.

**2) Support for affected industries and people**

**Table 6-3 Support for Affected Industries and People (Cuba)**

| Various government policies (COVID-19 Observatory for LAC) |    |  |  |
|--|----|--|--|
| Socioeconomic policy                                       | 13 |  |  |
| Health care & nutrition                                    | 7  |  |  |
| Education  | 2  |  |  |
| Agriculture & rural development                            | 0  |  |  |
| Private sector   | 15 |  |  |
| Environment & disaster prevention                          | 0  |  |  |
| Governance and social security                             | 2  |  |  |
| DX and innovation  | 1  |  |  |
| Infrastructure & energy                                    | 0  |  |  |
| Tourism  | 0  |  |  |
| PPP  | 0  |  |  |
| Others (b)   | 14 |  |  |
| total  | 54 |  |  |

Source: Survey Team

**3) Arrangement of various policies for COVID-19 taken by the government**

COVID-19 Observatory for Latin America and Caribbean (ECLAC) organized by governments.

**Table 6-4 Government-directed COVID-19 Policy Categories (Cuba)**

**Follow-up of the evolution of COVID-19 Measures**

| <b>Vaccination</b>  | <b>Economy</b>   | <b>Social protection</b>  |
|---|--|---|
| 1. Vaccination measures   | 1. Fiscal Policy   | 1. Cash transfers (new transfers, increase in existing transfers, expansion of cash transfers to new recipients, early disbursement of transfers) |
| <b>Movements across and within countries</b>  | 2. Monetary Policy   | 2. Food transfers / In-kind transfers   |
| 1. Restrictions or prohibition on the entry of foreign travelers  | 3. Business policy   | 3. Guarantee of basic services  |
| 2. Border closures and controls   | 4. Restriction of economic activity (including shops and shopping centers)                             | <b>Education / schools</b>  |
| 3. Border controls  | 5. Price and quantity controls   | 1. Suspension of classes  |
| 4. Restriction or closure of public places and mass gatherings  | 6. Economic Stimulus (includes aggregate value of fiscal measures and separately of credit guarantees) | 2. Provision of tools for distance learning (online platforms, TV, radio, distance-learning materials)  |
| 5. Other  | 7. Regulation of the personal hygiene and cleaning products market                                     | 3. Maintenance of school feeding programme (indicating under which modalities)  |
| <b>Health</b>   | 8. Debt relief and suspension of credit payments (individuals, microentrepreneurs)                     | <b>Gender</b>   |
| 1. Health emergency   | 9. Other   | 1. Gender-based violence against women  |
| 2. Mandatory coverage   | <b>Labor</b>   | 2. Care economy   |
| 3. Mandatory quarantine for foreign travelers, confirmed or suspected cases                                   | 1. Labor Protection  | 3. Employment and income generation   |
| 4. Mandatory general quarantine   | 2. Elective work leave   | 4. Benefits, transfers and other social protection measures   |
| 5. Type of policy on testing (universal, reduced to certain groups, etc.)                                     | 3. Reduction of working hours  | 5. Women's participation in the digital era   |
| 6. Free test coverage expansion   | 4. Prohibition of dismissal from work  | 6. Other  |
| 7. Hospitals (mechanical ventilators, additional ICU beds, protection equipment, temporary hospitals, others) | 5. Other   |   |

Source: Survey Team

## 6.2 Macroeconomic analysis and selection of priority countries

### 6.2.1 Macroeconomic analysis

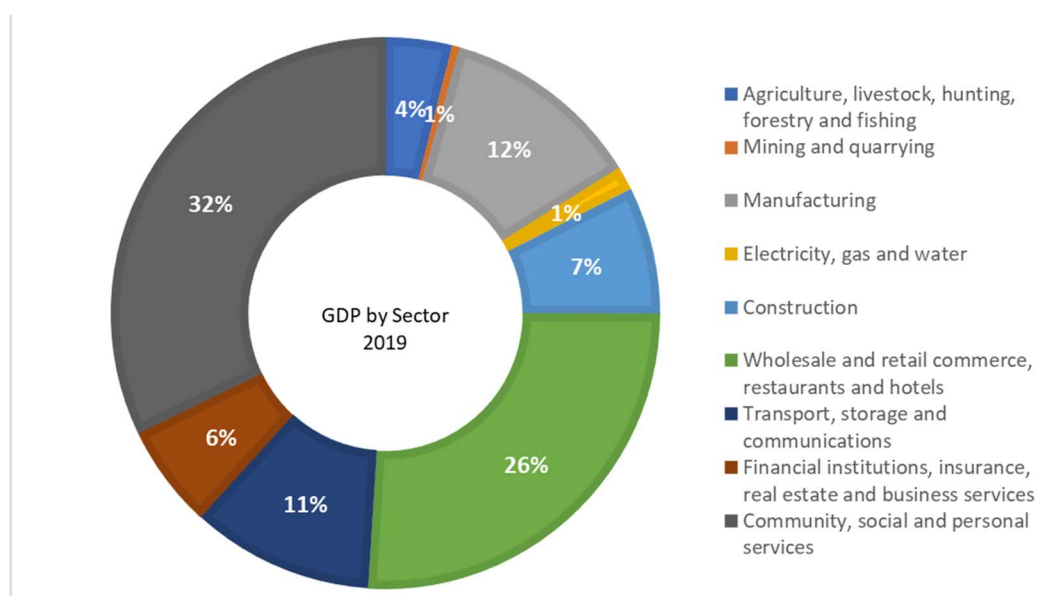
#### (1) Industrial composition

**Table 6-5 Industrial Composition (Cuba)**

Table: Gross domestic product, by sector (En millones de pesos a precios constantes de 1997)

|  | 2011   | 2012   | 2013   | 2014   | 2015   | 2016   | 2017   | 2018   | 2019a/ | 2020 b/ |
|--|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------|
| Agriculture, livestock, hunting, forestry and fishing                | 1,860  | 1,872  | 1,960  | 2,004  | 2,054  | 2,173  | 2,143  | 2,199  | ...    |         |
| Mining and quarrying   | 303    | 309    | 302    | 300    | 294    | 283    | 279    | 269    | ...    |         |
| Manufacturing  | 6,743  | 6,891  | 7,033  | 6,779  | 7,205  | 6,830  | 6,757  | 6,695  | ...    |         |
| Electricity, gas and water   | 669    | 698    | 724    | 729    | 760    | 769    | 779    | 788    | ...    |         |
| Construction   | 2,458  | 2,734  | 2,951  | 2,883  | 3,374  | 3,531  | 3,849  | 4,206  | ...    |         |
| Wholesale and retail commerce, restaurants and hotels                | 11,794 | 12,417 | 12,838 | 13,252 | 14,086 | 14,229 | 14,587 | 14,693 | ...    |         |
| Transport, storage and communications                                | 4,377  | 4,648  | 4,796  | 5,002  | 5,328  | 5,507  | 5,708  | 6,073  | ...    |         |
| Financial institutions, insurance, real estate and business services | 2,738  | 2,956  | 3,014  | 3,154  | 3,277  | 3,356  | 3,374  | 3,447  | ...    |         |
| Community, social and personal services                              | 17,240 | 17,141 | 17,380 | 17,506 | 17,471 | 17,567 | 17,848 | 18,184 | ...    |         |
| Total  | 48,180 | 49,666 | 50,998 | 51,609 | 53,849 | 54,245 | 55,324 | 56,554 | 0      | 0       |

Source: ECLAC



Source: Survey Team



## (2) Trends in major economic indicators

**Table 6-6 Trends in Major Economic Indicator (Cuba)**

Table 1 CUBA: MAIN ECONOMIC INDICATORS (Annual growth rates)

|  | 2011 | 2012 | 2013 | 2014     | 2015    | 2016     | 2017     | 2018     | 2019a/   | 2020 b/  |
|--|------|------|------|----------|---------|----------|----------|----------|----------|----------|
| Gross domestic product (Annual growth rates c/)                                      | 2.8  | 3.0  | 2.8  | 1.0      | 4.4     | 0.5      | 1.8      | 2.2      | 0.5      | -8.5     |
| Per capita gross domestic product (Annual growth rates c/)                           | 2.7  | 2.8  | 2.5  | 0.8      | 4.3     | 0.4      | 1.8      | 2.3      | 0.5      | -8.5     |
| Gross domestic product, by sector (Annual growth rates c/)                           |      |      |      |          |         |          |          |          |          |          |
| Agriculture, livestock, hunting, forestry and fishing                                | 4.4  | 0.7  | 4.7  | 2.2      | 2.5     | 5.8      | -1.4     | 2.6      | ...      |          |
| Mining and quarrying   | 1.4  | 2.1  | -2.3 | -0.7     | -2.0    | -3.7     | -1.4     | -3.6     | ...      |          |
| Manufacturing  | 3.9  | 2.2  | 2.1  | -3.6     | 6.3     | -5.2     | -1.1     | -0.9     | ...      |          |
| Electricity, gas and water   | 2.7  | 4.4  | 3.7  | 0.7      | 4.3     | 1.2      | 1.3      | 1.2      | ...      |          |
| Construction   | -7.3 | 11.3 | 7.9  | -2.3     | 17.0    | 4.7      | 9.0      | 9.3      | ...      |          |
| Wholesale and retail commerce, restaurants and hotels                                | 6.3  | 5.3  | 3.4  | 3.2      | 6.3     |          | 2.5      | 0.7      | ...      |          |
| Transport, storage and communications  | 3.6  | 6.2  | 3.2  | 4.3      | 6.5     | 3.4      | 3.6      | 6.4      | ...      |          |
| Financial institutions, insurance, real estate and business services                 | 2.4  | 8.0  | 2.0  | 4.6      | 3.9     | 2.4      | 0.5      | 2.2      | ...      |          |
| Community, social and personal services  | 0.6  | -0.6 | 1.4  | 0.7      | -0.2    | 0.5      | 1.6      | 1.9      | ...      |          |
| Balance of Payments (Millions of dollars)  |      |      |      |          |         |          |          |          |          |          |
| Current account balance  |      |      |      |          |         |          |          |          |          |          |
| Goods balance  |      |      |      |          |         | -8,113.8 | -7,827.8 | -9,170.7 | -3,772.2 | -5,127.8 |
| Exports, f.o.b.  |      |      |      |          |         | 2,156.1  | 2,344.1  | 2,313.5  | 1,680.5  | 1,911.2  |
| Imports, f.o.b.  |      |      |      |          |         | 10,269.9 | 10,171.9 | 11,484.2 | 5,452.7  | 7,039.1  |
| Services trade balance   |      |      |      | 10,588.9 | 9,334.5 | 9,189.8  | 9,260.8  | 9,569.3  |          |          |
| Income balance   |      |      |      |          |         |          |          |          |          |          |
| Net current transfers  |      |      |      |          |         |          |          |          |          |          |
| Capital and financial balance (Millions of dollars)                                  |      |      |      |          |         |          |          |          |          |          |
| Net foreign direct investment d/   |      |      |      |          |         |          |          |          |          |          |
| Other capital movements d/   |      |      |      |          |         |          |          |          |          |          |
| Foreign remittance from abroad for 2019 and 2020                                     |      |      |      |          |         |          |          |          |          |          |
| Microfinance dispatched and the sectors that received microfinance for 2019 and 2020 |      |      |      |          |         |          |          |          |          |          |

Source: Economic Survey of Latin America and the Caribbean 2020: Main conditioning factors of fiscal and monetary policies in the post-COVID-19 era

### 6.2.2 Impact analysis and identification of key sectors

#### (1) Impact assessment results for each sector by AHP analytic hierarchy process based on economic indicators

**Table 6-7 Results of Sector Impact Analysis by COVID-19 (Cuba)**

| ECLAC category   | Changes around COVID-19 | Trends before COVID-19 | Total GDP ratio of the sector | comprehensive evaluation |   |
|--|-------------------------|------------------------|-------------------------------|--------------------------|---|
| Importance (weight)  | 0.4590                  | 0.0660                 | 0.0750                        |                          |   |
| Agriculture, livestock, hunting, forestry and fishing                | 7                       | 5                      | 3                             | 0.099                    | 5 |
| Mining and quarrying   |                         | 1                      | 1                             | 0.003                    | 9 |
| Manufacturing  | 7                       | 2                      | 7                             | 0.101                    | 4 |
| Electricity, gas and water   |                         | 4                      | 2                             | 0.009                    | 8 |
| Construction   | 7                       | 9                      | 4                             | 0.107                    | 3 |
| Wholesale and retail commerce, restaurants and hotels                | 9                       | 7                      | 8                             | 0.135                    | 1 |
| Transport, storage and communications                                | 7                       | 8                      | 6                             | 0.109                    | 2 |
| Financial institutions, insurance, real estate and business services |                         | 6                      | 5                             | 0.017                    | 7 |
| Community, social and personal services                              |                         | 3                      | 9                             | 0.019                    | 6 |

Source: Survey Team

#### 1) ECLAC Sector Classification Amendments to the Sector Classification

In line with the method described in the main volume, the Sector Classification is divided into the Vertical Sector and the Cross-Cutting Sector, the ECLAC classification sector is allocated to the Vertical Sector Classification, and the evaluation of various policies related to COVID-19 taken by the government along with the results of the partner survey and the indicators of the national development



cooperation policy, the ranking of priority sectors are calculated using the four indicators, which are described in the table below.

**Table 6-8 Ranking of Priority Sectors (Cuba)**

|                                   | Economic Indicator Analysis | Government Policy on COVID-19 | Survey on COVID-19 by Development Partners | Country Development Cooperation Policy | Base Case |   | Priority |
|-----------------------------------|-----------------------------|-------------------------------|--|--|-----------|---|----------|
| Importance (weight)               | 0.6000                      | 0.2000                        | 0.1000                                     | 0.1000                                 |           |   |          |
| Social and Economic Policy        | 0.0000                      | 0.0481                        | 0.0000                                     | 0.0000                                 | 0.0481    |   | ○        |
| Health and Nutrition              | 0.0192                      | 0.0259                        | 0.0111                                     | 0.0250                                 | 0.0813    | 5 |          |
| Education                         | 0.0084                      | 0.0074                        | 0.0000                                     | 0.0000                                 | 0.0158    | 6 |          |
| Agriculture and Rural Development | 0.1095                      | 0.0000                        | 0.0111                                     | 0.0250                                 | 0.1456    | 3 | ○        |
| Manufacturing                     | 0.2155                      | 0.0556                        | 0.0111                                     | 0.0000                                 | 0.2822    | 1 | ○        |
| Environment/ Disaster Management  | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0250                                 | 0.0250    |   | ○        |
| Governance and Security           | 0.0000                      | 0.0074                        | 0.0000                                     | 0.0000                                 | 0.0074    |   | ○        |
| DX Innovation                     | 0.0000                      | 0.0037                        | 0.0333                                     | 0.0000                                 | 0.0370    |   | ○        |
| Infrastructure and Every          | 0.1654                      | 0.0000                        | 0.0111                                     | 0.0250                                 | 0.2015    | 2 | ○        |
| Tourism                           | 0.0819                      | 0.0000                        | 0.0222                                     | 0.0000                                 | 0.1041    | 4 |          |
| Public-Private Partnership        | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0000                                 | 0.0000    |   | ○        |

Source: Survey Team

## (2) Sensitivity analysis

### 1) Analysis case settings

Based on the above methodology, the following case settings were made.

**Table 6-9 Sensitivity Analysis Case-based Weighting Settings (Cuba)**

|  | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|--|-----------|------------------------|------------------------|------------------------|
| Economic indicator analysis  | 0.6       | 0.6                    | 0.5                    | 0.5                    |
| Investigation and arrangement of various policies for COVID-19 taken by the government | 0.2       | 0.1                    | 0.1                    | 0.1                    |
| Development partner survey results   | 0.1       | 0.2                    | 0.2                    | 0.3                    |
| Country-specific development cooperation policy  | 0.1       | 0.1                    | 0.2                    | 0.1                    |

Source: Survey Team

### 2) Summary of sensitivity analysis

The results of each sensitivity analysis are as summarized below. Sensitivity analysis did not show much change, which was close to the result of the base case.

**Table 6-10 Summary of Sensitivity Analysis Results (Cuba)**

|                                   | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|-----------------------------------|-----------|------------------------|------------------------|------------------------|
| Social and economic policy        |           |                        |                        |                        |
| Health care / nutrition           | 5         | 5                      | 5                      | 5                      |
| education                         | 6         | 6                      | 6                      | 6                      |
| Agriculture / rural development   | 3         | 3                      | 3                      | 3                      |
| Manufacturing industry            | 1         | 2                      | 2                      | 2                      |
| Environment / disaster prevention |           |                        |                        |                        |
| Governance and citizen security   |           |                        |                        |                        |
| DX / Innovation                   |           |                        |                        |                        |
| Infrastructure and Energy         | 2         | 1                      | 1                      | 1                      |
| sightseeing                       | 4         | 4                      | 4                      | 4                      |
| Public-private partnership        |           |                        |                        |                        |

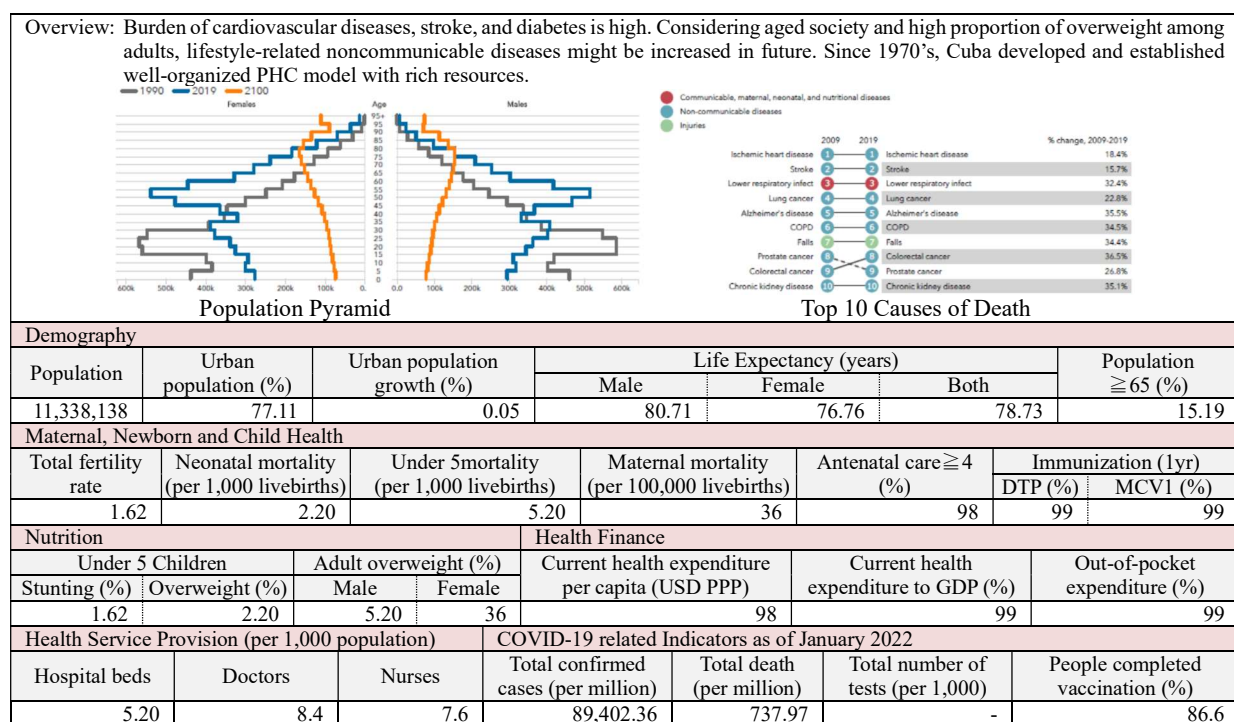
Source: Survey Team

### **(3) Selection of priority sectors by country**

From the above results, 1) social / economic policy, 2) agriculture / rural development, 3) manufacturing industry, 4) environment / disaster prevention, 5) governance / citizen security, 6) DX / innovation, 7) infrastructure / energy, 8)Public-private partnership are selected as priority sectors.

## 6.3 Country-specific information by sector

### 6.3.1 Health care / nutrition



Source: Graphs=Institute for Health Metrics and Evaluation, County Profile; Demography, Total fertility rate, Neonatal mortality, under-5 mortality, Health finance= World Development Indicators, the World Bank (Accessed on Aug 2021); Maternal mortality= UNICEF (Sep 2019); Antenatal care, Immunization, Nutrition, Health service provision,= OECD/The World Bank (2020), Health at a Glance: Latin America and the Caribbean 2020; COVID-19 related indicators= Our World in Data (Accessed on Jan 2022)

| Health                                  |   |
|---|---|
| Leadership/ Governance                  | Responsible Agency: Ministry of Public Health/ Ministerio de Salud Publica<br><a href="https://salud.msp.gob.cu/language/en/">https://salud.msp.gob.cu/language/en/</a> ; Centralized<br>Major Relevant Policies: Goals, Challenges and Priorities for the Current Year   |
| Service Providing System                | Physical/ psychological/ social approach is taken at all levels, family doctors to top referral hospitals. It contributes to continuum of care or seamless health services. Basic Health Groups cover consists of a family doctor, nurses, an internal medicine doctor, a pediatrician, a gynecologist, a dentist, a psychologist, and statistic and an information specialist cover primary level. One team covers around 1000 population. |
| Health Finance                          | National health insurance without any out-of-pocket payment   |
| Human Resource for Health               | More than 90% of doctors are family doctors (general medicine). Family doctors are highly respected and therefore, many doctors continue working in community health/ primary health care. Cuba government maintain human resource exchange with many developing countries to dispatch doctors to remote areas and receive medical students.  |
| IT/ Digital Health                      | Telemedicine since 1999/ advanced digital health<br>Since 1970's, Cuba have developed digital health including remote imaging at secondary and tertiary hospitals, INFOMED (operated by Health Telemetric Network established in 1992), e-health record on cloud server, remote education.  |
| Drugs/ Medical Equipment                | Independent research and development, as well as producing (BioCubaFarma)   |
| Priority                                | Increase level of satisfaction of the citizens to health services/ Elimination of resource wasting/ Improvement of lifestyle/ Promotion of research and development   |
| Communicable Disease Emergency Response | Necessary action and responses are undertaken along with IHR.<br>National influenza center: "Pedro Kouri" Institute of Tropical Medicine (Centro Colaborador de la OPS/OMS para el Estudio del Dengue y su Vector, Instituto de Medicina Tropical "Pedro Kouri" / IPK)  |
| Major Development Partners              | PAHO/WHO, UN Special Team (the United Nations Country Team: UNCT)   |
| Nutrition                               |   |
| Institutional Arrangement               | Executive Committee of Council of Ministers (Comité Ejecutivo del Consejo de Ministros)   |
| Major Relevant Policies                 | Plan Nacional De Accion Para La Nutricion De Cuba, 1994   |
| Human Resource for Health               | Nutrition related degrees: Yes<br>Nutrition related subjects in pre-service education: (no information)<br>Number of nutrition related professionals: 69.8 per 100,000 population   |

Source: Survey Team with reference to WHO Country Cooperation Strategy for Cuba at a glance, May 2016, Institute for Health Metrics and Evaluation, County Profile, WHO, Global atlas of medical devices, 2017, Vialart Vidal MN, Vidal Ledo MJ, Sarduy Domínguez Y, Delgado Ramos A, Rodríguez Díaz A, Fleitas; Estévez I, et al. Aplicación de

### 6.3.2 Education

| Overview  |   |  |                |                 |                 |               |
|---|---|--|----------------|-----------------|-----------------|---------------|
| Number of children  | Education level   | Preschool  | primary        | Lower secondary | Upper secondary |               |
|   | 2019  | 371,455 people   | 750,567 people | 351,128 people  | 420,871 people  |               |
| Source: Institute for Statistics (UIS), UNESCO Bureau of Statistics |   |  |                |                 |                 |               |
| Government authority  | Ministry of Education (Ministerio de Educación)   |  |                |                 |                 |               |
| Education indicator   | Net enrollment rate: primary education 99.2%, lower secondary 89.8%, upper secondary 82.3% (2019)<br>Primary education completion rate 86.5% (2019), out-of-school children rate 0.8% (2019) Source: UIS  |  |                |                 |                 |               |
| Learning achievement survey   | Results of the 2nd Regional Education Quality Survey (SERCE, 2006): 3rd grade primary school; science 648 points (1st position of 17 countries), reading comprehension 627 points (1st position of 17 countries), 6th grade; science 637 points (1st position of 17 countries), reading comprehension 596 points (1st position of 17 countries), science 662 points (1st position of 10 countries). |  |                |                 |                 |               |
| Impact of COVID-19  |   |  |                |                 |                 |               |
| School closure / reopening  | March 2020-February 2, 2021 Complete closure 77 days, partial closure 44 days, total 121 days. In 2021, the summer vacation was extended and classes were held almost remotely. From October, classes were held in a hybrid type with remote and face-to-face in primary and lower secondary education.   |  |                |                 |                 |               |
| COVID-19 measures   | To address the impact of COVID-19 pandemic, the Ministry of Education publishes four booklets on the theme of "Education for Social and Emotional Care in the Face of Natural, Technological and Health Disasters in Cuba" including a guidance for school reopening, suggestions for school and family education activities, monitoring assessments, and sustainability methodologies.             |  |                |                 |                 |               |
| Distance education  | Implementation status   | The Education Technology Bureau of the Ministry of Education has set up an online platform, CubaEduca, to develop digital teaching materials and open an educational channel for television.<br>Distance Education Readiness Index Level 4 announced by UNICEF is "A distance learning system has been established that allows most children and students to continue learning even when schools are closed, and there are areas that need improvement, but there is resilience "<br>However, according to the questionnaire survey conducted by the World Bank, etc., distance education is conducted by TV programs except for higher education. |                |                 |                 |               |
|   | Access  | School-aged children / students who can connect to the Internet at home (%)  |                |                 |                 |               |
|   |   | 2019   | Rural area     | Urban area      | Poor            | wealthy class |
|   | Whole school age  | 1  | 6              | 15              | 0               | 4             |
|   | Primary Education   | 2  | 6              | 16              | 0               | 5             |
|   | Lower secondary education   | 0  | 7              | 16              | 0               | 4             |
|   | Upper secondary education   | 1  | 5              | 13              | 0               | 4             |
|   | Educational purpose in schools' Internet access rate: 15.83% for primary school, 60.09% for lower secondary school, 52.85% for Upper secondary school (UNESCO)  |  |                |                 |                 |               |
|   | Teacher training  | N / A  |                |                 |                 |               |
| School hygiene  | Infection control measures  | -Measures for Post COVID-19<br>-Measures to prevent infection for reopening school, etc.   |                |                 |                 |               |
|   | Facility maintenance  | Basic water supply facilities, toilets, and hand-washing are maintained at almost 100% of schools (2019). World Bank / UNICEF Survey <a href="https://washdata.org/">https://washdata.org/</a>   |                |                 |                 |               |
| School lunch / nutrition  | N / A   |  |                |                 |                 |               |
| Countermeasures for vulnerable people                               | N / A   |  |                |                 |                 |               |
| Support for donors, etc.  | UNICEF: Helping create guidance for hygiene and safety in schools, distributing hygiene kits to vulnerable families, developing online teaching materials and teacher training, more than 200 children  |  |                |                 |                 |               |

|  |  |
|--|--|
|  | with autism and intellectual disabilities and their teachers, Family support |
|--|--|

Source: Survey Team

### 6.3.3 Agriculture / rural development

|   |  |            |            |            |            |            |
|---|--|------------|------------|------------|------------|------------|
| Urban / rural population ratio                    | 77.0% / 23.0% (FAOSTAT 2018)   |            |            |            |            |            |
| Agricultural land area                            | 6,401,000 ha (FAOSTAT 2019) 1)   |            |            |            |            |            |
| Agricultural sector employment                    | 18.9% of all employment (FAOSTAT 2014) 2)  |            |            |            |            |            |
| Agricultural GDP                                  | 3.8% of total GDP (World Bank 2018)  |            |            |            |            |            |
| Of the agricultural sector Value added amount     | \$ 3,577,925.02 thousand dollars (including forestry) (World Bank 2018) 3)   |            |            |            |            |            |
| Agricultural sector expenditure ratio             | Ratio of agricultural fiscal expenditure to national budget (%) 4)   |            |            |            |            |            |
|   | 2017   | 2018       | 2019       |            |            |            |
|   | 4.75   | 5.57       | 4.98       |            |            |            |
| Of the agricultural sector Export-import balance  | Trade balance (USD1,000, FAOSTAT) 5)   |            |            |            |            |            |
|   |  | 2015       | 2016       | 2017       | 2018       | 2019       |
|   | export   | 687,701    | 669,459    | 819,711    | 528,887    | 508,821    |
|   | Import   | 2,270,910  | 2,317,205  | 2,362,806  | 2,290,043  | 2,263,858  |
|   | Balance of payments  | -1,583,209 | -1,647,746 | -1,543,095 | -1,761,156 | -1,755,037 |
| Agricultural development policy, plan or strategy | <p>Cuba depends on imports for up to 80% of its food 6). The Cuban government has published "Guidelines for Economic and Social Policy" 7) as a companion to the development of each economic sector including agriculture. This 2016-2021 edition consists of a total of 274 guidelines 8), and in the agricultural industry sector, guideline 147 "improves the contribution of agricultural industry production to the economic development of the country and gross domestic product, and is for domestic use. "Guarantee the supply of food" is stipulated in the first place. In No. 154, "At the same time as the introduction of new agricultural technology, by incorporating the rural labor force, especially young people and females, to guarantee the increase in agricultural production, it stimulates permanence and stability, and restores and develops the agricultural community. It contains a number of guidelines covering a wide range of themes that can be taken as concrete measures for No. 147, such as "Developing a comprehensive policy to encourage." In addition, in No. 156, "Integrated management of science, technology and environment will be carried out to make agriculture, forestry and fishery more productive and sustainable", and in No. 157, "Soil and water, animal and plant inheritance". There are many things related to environmental conservation, such as "Priority is given to the protection of natural resources including resources. Restoration of high-quality seed production and contribution to environmental conservation by developing and using bio-products utilizing animal and plant genetics." The latest guideline is 2021-2026 9). Published during COVID-19, there are no guidelines directly related to COVID-19 for the agricultural sector. Compared to the previous time, the guidelines have been organized and the number has decreased, but there is no change in the content that deals with a wide range of themes in this sector. Specific changes include the diversification of production systems, the diversification of agricultural production material supply methods, and the promotion of nutrition education.</p> |            |            |            |            |            |
| Impact of COVID-19                                | <p>In Cuba, the shortage of goods has become chronic due to long-standing US economic sanctions. COVID-19, which occurred under such circumstances, caused the tourism industry, which is the main means of acquiring foreign currency, to stagnate significantly, and along with this, the shortage of goods worsened, and the situation is extremely severe. Import-dependent food products are no exception, making access to various food products difficult. The supply of agricultural input materials such as fertilizers, which depend on imports as well as food, has been sluggish, and while food imports have been sluggish, although it is essential to increase domestic production, there is a shortage of materials and energy such as electricity. An increasing number of farms are giving up production due to soaring prices.</p> <p>Under these predicaments, in April 2021, Deputy Prime Minister Jorge Luis proposed "63 Measures to Increase Food Production" 10). Agricultural production problems are classified into four categories, "system / organization", "production technology", "land use", and "finance / investment / society", and 63 measures are proposed based on these results, of which 30 are This is the highest priority measure that should be taken immediately. Measures include various incentives such as "reduction of prices of production input materials such as electricity, water and fertilizer", "increased purchase price of products", "strengthening of finance and insurance" and "tax reduction". Furthermore, "Agricultural materials such as fertilizers that were previously sold and distributed by state-owned companies to farmers can now be freely selected and purchased directly by farmers." Regarding sales, farmers can freely and directly sell small livestock meat to the market. "The flexibility of purchasing and selling methods has also been increased. On the other hand, the state has a stronger initiative for things that</p>   |            |            |            |            |            |

|                    |   |
|--------------------|---|
|                    | <p>are not profitable even with increased flexibility, such as "dissolution of agricultural cooperatives that are not expected to recover production and economic efficiency, and demand for the return of land to the government." Measures are also included. Another characteristic is "integration and strengthening of regional food production system based on food sovereignty and nutrition education program". It is considered that this is aimed at improving the efficiency of production systems such as distribution by promoting local production for local consumption, which is produced and consumed locally.</p> <p>The Cuban government has announced the resumption of international tourism, which is one of the most important sources of foreign currency acquisition, from November 15, 2021, while the national vaccination of its own COVID-19 vaccine is proceeding smoothly.</p>   |
| Source / reference | <p>1) FAOSTAT-Land, Input and Sustainability-Land Use-Area-Agriculture (<a href="https://www.fao.org/faostat/en/#data/RL">https://www.fao.org/faostat/en/#data/RL</a>)</p> <p>2) FAOSTAT- Share of employment in agriculture (% of total employment) &amp; Share of female employment in agriculture (% of employment in agriculture) (<a href="https://www.fao.org/faostat/en/#data/OE">https://www.fao.org/faostat/en/#data/OE</a>)</p> <p>3) Agriculture, forestry, and fishing, value added (constant 2015 US \$) --Latin America &amp; Caribbean (<a href="https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart">https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart</a>)</p> <p>4) FAOSTAT-Government Expenditure-Share of Total Expenditure-Central Government (<a href="https://www.fao.org/faostat/en/#data/IG">https://www.fao.org/faostat/en/#data/IG</a>)</p> <p>5) FAOSTAT-Trade-Crops and livestock products-Import / Export Value-Agricultural Products (<a href="https://www.fao.org/faostat/en/#data/TCL">https://www.fao.org/faostat/en/#data/TCL</a>)</p> <p>6) Agricultural Exports to Cuba, 2014, SLC (<a href="https://www.sclatlanta.org/research/index.php?pub=513">https://www.sclatlanta.org/research/index.php?pub=513</a> <a href="https://www.fao.org/faostat/en/#data/TCL">https://www.fao.org/faostat/en/#data/TCL</a>)</p> <p>7) Lineamientos de la política económica y social (<a href="http://faolex.fao.org/docs/pdf/cub169561.pdf">http://faolex.fao.org/docs/pdf/cub169561.pdf</a>)</p> <p>8) Actualización de los Lineamientos de la Política Económica y Social del Partido y la Revolución para el período 2016-2021 (<a href="http://faolex.fao.org/docs/pdf/cub169577.pdf">http://faolex.fao.org/docs/pdf/cub169577.pdf</a>)</p> <p>9) Lineamientos De La Política Económica Y Social Del Partido Y La Revolución Para El Período 2021-2026 (<a href="https://www.tsp.gob.cu/sites/default/files/documentos/Conceptualizaci%C3%B3n%20y%20Lineamientos%20actualizados%20%281%29.pdf">https://www.tsp.gob.cu/sites/default/files/documentos/Conceptualizaci%C3%B3n%20y%20Lineamientos%20actualizados%20%281%29.pdf</a>)</p> <p>10) (<a href="https://www.canalcaribe.icrt.cu/viceprimer-ministro-de-cuba-evalua-impacto-de-las-63-medidas-del-gobierno-para-el-sector-agropecuario/">https://www.canalcaribe.icrt.cu/viceprimer-ministro-de-cuba-evalua-impacto-de-las-63-medidas-del-gobierno-para-el-sector-agropecuario/</a>)<a href="https://www.canalcaribe.icrt.cu/viceprimer-ministro-de-cuba-evalua-impacto-de-las-63-medidas-del-gobierno-para-el-sector-agropecuario/">https://www.canalcaribe.icrt.cu/viceprimer-ministro-de-cuba-evalua-impacto-de-las-63-medidas-del-gobierno-para-el-sector-agropecuario/</a></p> |

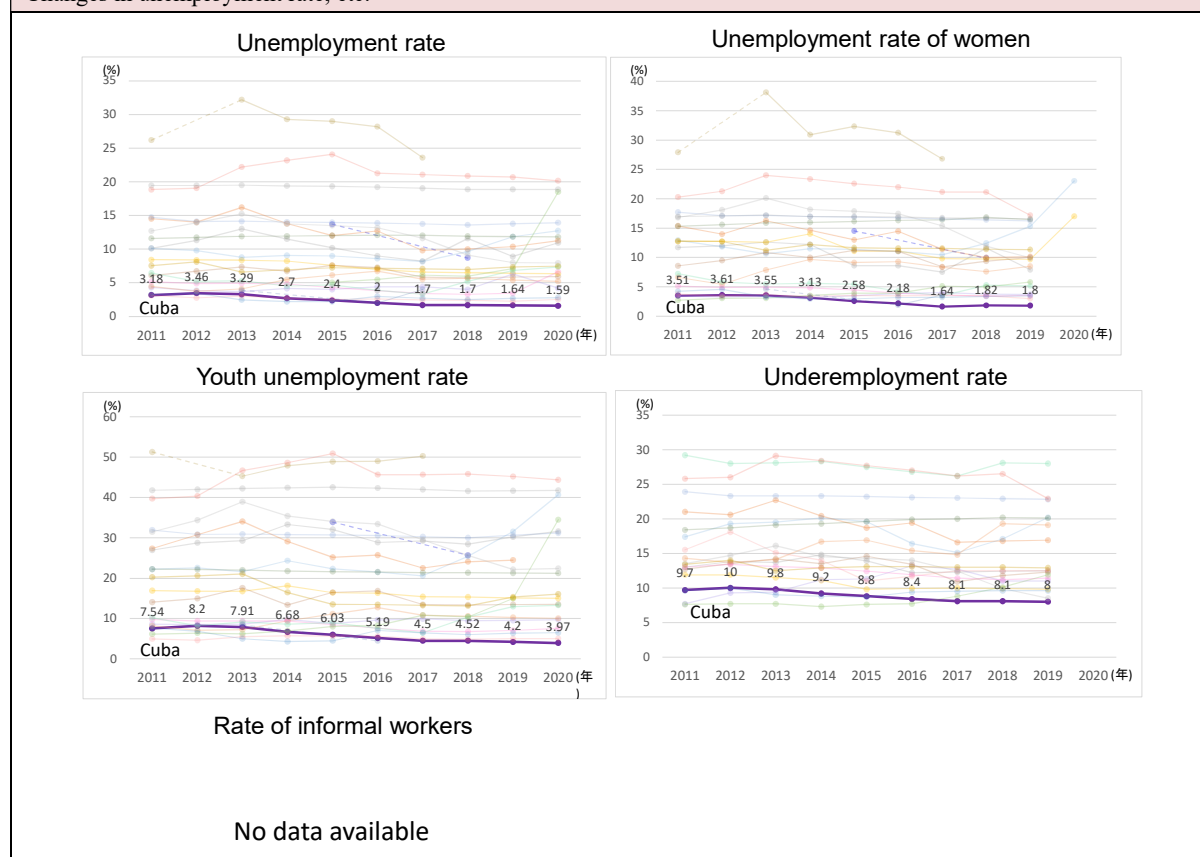
### 6.3.4 Private sector

Since Cuba is a communist country, it is difficult to compare it with other countries. GDP ranks second in the region, but the accuracy of this figure is doubtful given the recent economic situation. While the minimum wage is the lowest, the unemployment rate is very low, which might to indicate a difference in the political system.

|              | Index                      | Value | Ranking                 | Year | Source     |
|--------------|----------------------------|-------|-------------------------|------|------------|
| Productivity | GDP per capita (USD)       | —     | — (Among 22 countries)  | —    | —          |
|              | GDP per worker (USD)       | —     | — (Among 18 countries)  | —    | —          |
| Employment   | Minimum wage (USD / month) | 16    | 23 (Among 23 countries) | 2019 | ILO        |
|              | Unemployment rate          | 1.64  | 1 (Among 22 countries)  | 2019 | Statista   |
|              | Female unemployment rate   | 1.8   | 1 (Among 22 countries)  | 2019 | World Bank |
|              | Youth unemployment rate    | 4.2   | 1 (Among 22 countries)  | 2019 | Statista   |
|              | Underemployment rate       | 8     | 1 (Among 18 countries)  | 2019 | ILO        |
|              | Informal worker rate       | —     | — (Among 12 countries)  | —    | —          |

Source: Described in the table

Changes in unemployment rate, etc.



Source: World Bank, ILO, The Global Economy, etc.

### 6.3.5 Environment / Disaster Management

|                     | item   | data   | remarks                  |
|---------------------|--|--|--------------------------|
| Environment         | Environmental agency                                     | Ministerio de Ciencia, Tecnología y Medio Ambiente de Cuba |                          |
|                     | Waste-related organizations                              | Municipalities<br>Dirección Comunal de Servicios Comunales |                          |
|                     | Environmental Budget (USD)                               | 2019:-<br>2020:-<br>2021:-<br>3-year average:-             | not gotten               |
|                     | Environmental budget per capita (2019-2021 average, USD) | —————  | not gotten               |
|                     | Budget ratio to national budget (2019)                   | —————  | not gotten               |
|                     | Donor support status                                     | 8 cases  | As of May 2021           |
|                     | Renewable energy power generation (GWh) (2019)           | 911  | IRENA, 2021              |
|                     | Geothermal power generation capacity (MWe)               | 2020: 0<br>2025 Forecast: 0                                | WGC, 2020                |
| Disaster Management | Disaster prevention organization                         | The National Civil Defense Staff                           |                          |
|                     | Donor support status                                     | 5 cases  | As of May 2021           |
|                     | Number of natural disasters (2010-2020)                  | 4 cases<br>Major disasters: floods, droughts               |                          |
|                     | Number of victims (persons) per 100,000 population       | 1000 people  | 15th out of 23 countries |

Source: Survey Team



### 6.3.6 Governance and citizen security

| Item  | Overview   |                           |                |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
|---|--|---------------------------|----------------|-------------------------|-------------------------|--------------------------|------|---------------------------|-----|------|-----|------|-----|------|------|----|------|-----|------|-----|---|------|---------------------------|-----|------|-----|------|-----|------|------|-----|------|-----|------|-----|--------------------------|------|---------------------------|-----|------|-----|------|-----|------|------|-----|------|-----|------|-----|--------------------|------|---------------------------|-----|------|-----|------|-----|------|------|----|------|-----|------|-----|-------------|------|---------------------------|-----|------|-----|------|-----|------|------|-----|------|-----|------|-----|-----------------------|------|---------------------------|-----|------|-----|------|-----|------|------|-----|------|-----|------|-----|
| Political system                                      | Socialist republic   |                           |                |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
| Election system                                       | The President and Vice President are indirectly elected by the National Assembly. The term of office is 5 years. (Re-election is possible for another 5 years after the end of the term) Last election Held on October 10, 2019. (Next time is scheduled for 2024)   |                           |                |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
| Legislative system                                    | Unicameral National Assembly of People's Power (number of seats 605, 586 seats as of 2021) Elected by direct voting of absolute majority system.   |                           |                |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
| Most recent / next legislative election               | Implemented on March 11, 2018 (next time is scheduled for 2023)  |                           |                |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
| Judicial system Appointment and term of judge         | The term of office of a professional judge elected by the National Assembly has not been specified. There are "general judges" appointed by workers' organizations, or elected by city and state parliaments.  |                           |                |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
| Political stability                                   | Over the last decade, the level of political stability has increased.  |                           |                |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
| "Worldwide Governance Indicators"                     | <p>The level of guarantee of civil and political rights and the level of "regulatory quality" that promotes the activities of the private sector are extremely low, but other indicators are around the regional average.</p> <table border="1"> <caption>Approximate Percentile Ranks from Worldwide Governance Indicators</caption> <thead> <tr> <th>Indicator</th> <th>Year</th> <th>Country/Region</th> <th>Percentile Rank (0-100)</th> </tr> </thead> <tbody> <tr> <td rowspan="6">Voice and Accountability</td> <td rowspan="3">2010</td> <td>Latin America &amp; Caribbean</td> <td>~60</td> </tr> <tr> <td>2019</td> <td>~60</td> </tr> <tr> <td>2020</td> <td>~60</td> </tr> <tr> <td rowspan="3">Cuba</td> <td>2010</td> <td>~5</td> </tr> <tr> <td>2019</td> <td>~10</td> </tr> <tr> <td>2020</td> <td>~10</td> </tr> <tr> <td rowspan="6">Political Stability and Absence of Violence/Terrorism</td> <td rowspan="3">2010</td> <td>Latin America &amp; Caribbean</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Cuba</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~65</td> </tr> <tr> <td>2020</td> <td>~65</td> </tr> <tr> <td rowspan="6">Government Effectiveness</td> <td rowspan="3">2010</td> <td>Latin America &amp; Caribbean</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Cuba</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="6">Regulatory Quality</td> <td rowspan="3">2010</td> <td>Latin America &amp; Caribbean</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Cuba</td> <td>2010</td> <td>~5</td> </tr> <tr> <td>2019</td> <td>~10</td> </tr> <tr> <td>2020</td> <td>~10</td> </tr> <tr> <td rowspan="6">Rule of Law</td> <td rowspan="3">2010</td> <td>Latin America &amp; Caribbean</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Cuba</td> <td>2010</td> <td>~35</td> </tr> <tr> <td>2019</td> <td>~45</td> </tr> <tr> <td>2020</td> <td>~45</td> </tr> <tr> <td rowspan="6">Control of Corruption</td> <td rowspan="3">2010</td> <td>Latin America &amp; Caribbean</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Cuba</td> <td>2010</td> <td>~65</td> </tr> <tr> <td>2019</td> <td>~65</td> </tr> <tr> <td>2020</td> <td>~65</td> </tr> </tbody> </table> | Indicator                 | Year           | Country/Region          | Percentile Rank (0-100) | Voice and Accountability | 2010 | Latin America & Caribbean | ~60 | 2019 | ~60 | 2020 | ~60 | Cuba | 2010 | ~5 | 2019 | ~10 | 2020 | ~10 | Political Stability and Absence of Violence/Terrorism | 2010 | Latin America & Caribbean | ~55 | 2019 | ~55 | 2020 | ~55 | Cuba | 2010 | ~55 | 2019 | ~65 | 2020 | ~65 | Government Effectiveness | 2010 | Latin America & Caribbean | ~55 | 2019 | ~55 | 2020 | ~55 | Cuba | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Regulatory Quality | 2010 | Latin America & Caribbean | ~55 | 2019 | ~55 | 2020 | ~55 | Cuba | 2010 | ~5 | 2019 | ~10 | 2020 | ~10 | Rule of Law | 2010 | Latin America & Caribbean | ~55 | 2019 | ~55 | 2020 | ~55 | Cuba | 2010 | ~35 | 2019 | ~45 | 2020 | ~45 | Control of Corruption | 2010 | Latin America & Caribbean | ~55 | 2019 | ~55 | 2020 | ~55 | Cuba | 2010 | ~65 | 2019 | ~65 | 2020 | ~65 |
|   | Indicator  | Year                      | Country/Region | Percentile Rank (0-100) |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
| Voice and Accountability                              | 2010   | Latin America & Caribbean | ~60            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
|   |  | 2019                      | ~60            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
|   |  | 2020                      | ~60            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
|   | Cuba   | 2010                      | ~5             |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
|   |  | 2019                      | ~10            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
|   |  | 2020                      | ~10            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
| Political Stability and Absence of Violence/Terrorism | 2010   | Latin America & Caribbean | ~55            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
|   |  | 2019                      | ~55            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
|   |  | 2020                      | ~55            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
|   | Cuba   | 2010                      | ~55            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
|   |  | 2019                      | ~65            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
|   |  | 2020                      | ~65            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
| Government Effectiveness                              | 2010   | Latin America & Caribbean | ~55            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
|   |  | 2019                      | ~55            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
|   |  | 2020                      | ~55            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
|   | Cuba   | 2010                      | ~55            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
|   |  | 2019                      | ~55            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
|   |  | 2020                      | ~55            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
| Regulatory Quality                                    | 2010   | Latin America & Caribbean | ~55            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
|   |  | 2019                      | ~55            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
|   |  | 2020                      | ~55            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
|   | Cuba   | 2010                      | ~5             |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
|   |  | 2019                      | ~10            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
|   |  | 2020                      | ~10            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
| Rule of Law   | 2010   | Latin America & Caribbean | ~55            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
|   |  | 2019                      | ~55            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
|   |  | 2020                      | ~55            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
|   | Cuba   | 2010                      | ~35            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
|   |  | 2019                      | ~45            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
|   |  | 2020                      | ~45            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
| Control of Corruption                                 | 2010   | Latin America & Caribbean | ~55            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
|   |  | 2019                      | ~55            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
|   |  | 2020                      | ~55            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
|   | Cuba   | 2010                      | ~65            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
|   |  | 2019                      | ~65            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
|   |  | 2020                      | ~65            |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
| Global freedom status                                 | 13/100 points (citizen rights: 1/40 points, political rights: 12/60 points) Classified as "non-free country" (Freedom House 2021)  |                           |                |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
| Corruption Perception Index (CPI)                     | 63/180, 47/100 points (Transparency International 2020).   |                           |                |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
| E-government development index                        | It is lower than the average level in the region, especially behind the development of online service indicators and communication infrastructure. In terms of human capital, it remains higher than the Latin American regional average. Digital national ID is widespread.   |                           |                |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
| Rule of law   | According to WGI, the level of "rule of law" has improved in recent years, but it is below the regional average.   |                           |                |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |
| Security  | The homicide rate is the lowest among the Central American and Caribbean region, there are few general crimes, and security is good. The homicide rate in 2016 was 5 / 100,000 (the same year, the Caribbean average was 14.3, and the world average was 6) (UNODC 2021).  |                           |                |                         |                         |                          |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |   |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                          |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                    |      |                           |     |      |     |      |     |      |      |    |      |     |      |     |             |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |                       |      |                           |     |      |     |      |     |      |      |     |      |     |      |     |

Source: Survey Team

### 6.3.7 DX / Innovation

| <p>Basic indicators and statistics</p>   | <p>E-government ranking <sup>1)</sup>: 140th</p> <p>Mobile connection index <sup>2)</sup>:-</p> <p>Network Infrastructure Index:-</p> <p>Internet user rate 68.0</p> <p>Mobile connection rate 54.4</p> <p>Fixed broadband rate 1.6</p> <p>Rate of increase in the number of Internet users- (2021/2020)</p> | <p>Radar chart of e-government ranking</p> <table border="1"> <caption>Data for Radar Chart of e-government ranking</caption> <thead> <tr> <th>Indicator</th> <th>Central America</th> <th>Caribbean</th> <th>Cuba</th> </tr> </thead> <tbody> <tr> <td>OSI</td> <td>0.2588</td> <td>0.2588</td> <td>0.2588</td> </tr> <tr> <td>TII</td> <td>0.2514</td> <td>0.2514</td> <td>0.2514</td> </tr> <tr> <td>HCI</td> <td>0.8215</td> <td>0.8215</td> <td>0.8215</td> </tr> </tbody> </table> | Indicator | Central America | Caribbean | Cuba | OSI | 0.2588 | 0.2588 | 0.2588 | TII | 0.2514 | 0.2514 | 0.2514 | HCI | 0.8215 | 0.8215 | 0.8215 |
|--|--|--|-----------|-----------------|-----------|------|-----|--------|--------|--------|-----|--------|--------|--------|-----|--------|--------|--------|
| Indicator  | Central America  | Caribbean  | Cuba      |                 |           |      |     |        |        |        |     |        |        |        |     |        |        |        |
| OSI  | 0.2588   | 0.2588   | 0.2588    |                 |           |      |     |        |        |        |     |        |        |        |     |        |        |        |
| TII  | 0.2514   | 0.2514   | 0.2514    |                 |           |      |     |        |        |        |     |        |        |        |     |        |        |        |
| HCI  | 0.8215   | 0.8215   | 0.8215    |                 |           |      |     |        |        |        |     |        |        |        |     |        |        |        |
| <p><b>Communication network</b></p>  |  |  |           |                 |           |      |     |        |        |        |     |        |        |        |     |        |        |        |
| <p>In Cuba's telecommunications sector, mobile phone and fixed Internet penetration rates <sup>3)</sup> and <sup>4)</sup> (numbers in parentheses are Latin American and Caribbean averages) are significantly higher at 58.8% (100.4%) and 2.0% (15.7%), respectively. The penetration rate of fixed lines<sup>5)</sup> is also low at 13.3% (15.0%). Fixed-line and mobile services are still monopolized by the government-controlled Cuban telecommunications company <sup>6)</sup> (ETECSA, brand name Cubacel), lagging behind the development of telecommunications infrastructure compared to other countries in the region. Most fixed-line telephone networks consist of conventional copper wiring installed in the early to mid 20th century, the so-called "last mile" that connects end users to local central stations<sup>7)</sup>. A small number of microwave towers are also used <sup>7)</sup>. ETECSA has begun digitizing fixed-line telephones as a voice network, and by the end of 2014, it had achieved a digitization rate of 99% <sup>7)</sup>. In 2015, ETECSA and the U.S. company IDT agreed to restore international long-distance telephone service between the two countries<sup>8)</sup>, and since then, Wi-Fi hotspots will be installed in various locations <sup>9)</sup>. At the discretion of the government, shift to improving access to services. In 2019, the Ministry of Communications (Mincom) permits the construction of small, non-profit private Wi-Fi networks and the import of telecommunications equipment <sup>9)</sup>. The ADSL service started in the Havana region in March 2017 and has been expanded since then, but the service fee (per hour) is \$ 0.1<sup>10)</sup> and the cost is high (the average monthly income in 2017 is about \$ 30<sup>11)</sup>. ). In 2019, ETECSA and Google signed a memorandum of understanding to begin negotiations on an Internet traffic exchange service (peering) with the aim of improving the quality of access to content from the Internet<sup>12)</sup>. The LTE service started in 2019, and by the end of the same year, more than 473 LTE base stations had been built throughout the island <sup>9)</sup>.</p> |  |  |           |                 |           |      |     |        |        |        |     |        |        |        |     |        |        |        |
| <p><b>National Strategy for Digital Transformation</b></p>   |  |  |           |                 |           |      |     |        |        |        |     |        |        |        |     |        |        |        |
| <p>The National Plan for Economic and Social Development 2030 (PNDES 2030) <sup>13)</sup> represents policies, objectives, strategies, and general guidelines for national economic and social issues, promoting and developing the computerization of society. Utilization of ICT for is structured as one of the country's strategic sectors. However, due to the restrictions imposed by the socio-economic model, there are many issues that pose barriers to ICT development, such as instability of telecommunications services, vulnerability due to low investment in infrastructure, and lack of public-private partnership<sup>14)</sup>. The National Information Policy <sup>15)</sup> (PNI) announced in 1999 implemented the Social Informatization Program (PRIS) <sup>15)</sup> aimed at computerizing society, and as part of this, the Computerization Project for Education <sup>16)</sup> was implemented in 2001. Was approved. In 2002, under the name of "Future Project 17", the computerization of the country and the development of the software industry were added to the goal setting, and in the same year, the Supreme School Computer Science University (UCI) was established to achieve the goal. In 2004, he established a computerization office under Mincom as a department in charge of computerization programs. We are also discussing the promotion of the integration of private computer networks under the jurisdiction of the national ministers, the so-called "Cuba network" <sup>9)</sup>, which will provide secure, large-scale and systematic access to information and public services at the national level. While it is expected to be promoted, illegal local private networks such as SNET (Street Network), which are not under the control of the government, will be regulated by a new law in July 2019 <sup>18)</sup>.</p>  |  |  |           |                 |           |      |     |        |        |        |     |        |        |        |     |        |        |        |
| <p><b>Characteristic efforts</b></p>   |  |  |           |                 |           |      |     |        |        |        |     |        |        |        |     |        |        |        |
| <p>Exports of medical services in 2020 will account for 50% of the exports of services, which will account for 80% of the country's total exports <sup>19)</sup>. Under the COVID-19 situation, we will focus not only on overseas dispatch of medical teams, but also on promoting development to provide telemedicine online services<sup>20)</sup> by excellent human resources with reliable and advanced medical technology to the world. ing. Currently, medical guidance and second opinion services are the main focus, but we are exploring possibilities such as remote monitoring services, remote treatment, electronic medical records, and telemedicine education<sup>21)</sup>.</p>   |  |  |           |                 |           |      |     |        |        |        |     |        |        |        |     |        |        |        |
| <p><b>source</b></p>   |  |  |           |                 |           |      |     |        |        |        |     |        |        |        |     |        |        |        |
| <ol style="list-style-type: none"> <li>1. E-Gov-Index: a composite indicator that consists of three indexes (Online Service Index, Telecommunication Infrastructure Index and Human Capital Index), which are equally weighted. It ranges from 0 to 1, with 1 being the most developed.</li> <li>2. Mobile Connectivity Index: an input index developed by GSMA to measure the performance against the four key enablers of mobile internet adoption – infrastructure, affordability, consumer readiness and content. (<a href="https://www.gsma.com/mobileforddevelopment/wp-content/uploads/2016/06/Mobile-Connectivity-Launch-Report.pdf">https://www.gsma.com/mobileforddevelopment/wp-content/uploads/2016/06/Mobile-Connectivity-Launch-Report.pdf</a>)</li> <li>3. Mobile cellular subscriptions (per 100 people) --Latin America &amp; Caribbean, Cuba <a href="https://data.worldbank.org/indicator/IT.CEL.SETS.P2?locations=ZJ-CU">https://data.worldbank.org/indicator/IT.CEL.SETS.P2?locations=ZJ-CU</a></li> <li>4. Fixed broadband subscriptions (per 100 people) --Latin America &amp; Caribbean, Cuba <a href="https://data.worldbank.org/indicator/IT.NET.BBND.P2?locations=ZJ-CU">https://data.worldbank.org/indicator/IT.NET.BBND.P2?locations=ZJ-CU</a></li> <li>5. Fixed telephone subscriptions (per 100 people) --Latin America &amp; Caribbean, Cuba <a href="https://data.worldbank.org/indicator/IT.MLT.MAIN.P2?locations=ZJ-CU">https://data.worldbank.org/indicator/IT.MLT.MAIN.P2?locations=ZJ-CU</a></li> <li>6. ETECSA, un monopolio capitalista en Cuba <a href="https://www.cubanet.org/actualidad-destacados/etecsa-un-monopolio-capitalista-en-cuba/">https://www.cubanet.org/actualidad-destacados/etecsa-un-monopolio-capitalista-en-cuba/</a></li> <li>7. Overview of Cuban Imports of Goods and Services and Effects of US Restrictions <a href="https://www.usitc.gov/publications/332/pub4597.pdf">https://www.usitc.gov/publications/332/pub4597.pdf</a></li> <li>8. Activan conexión telefónica directa entre Cuba y EE.UU.</li> </ol>  |  |  |           |                 |           |      |     |        |        |        |     |        |        |        |     |        |        |        |

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| 9.  | <a href="https://www.bbc.com/mundo/ultimas_noticias/2015/03/150311_ultnot_cuba EEUU_telefono_jm">https://www.bbc.com/mundo/ultimas_noticias/2015/03/150311_ultnot_cuba EEUU_telefono_jm</a>  |
|     | Henry Lancaster, Cuba --Telecoms, Mobile and Broadband --Statistics and Analyses<br><a href="https://www.budde.com.au/Research/Cuba-Telecoms-Mobile-and-Broadband-Statistics-and-Analyses">https://www.budde.com.au/Research/Cuba-Telecoms-Mobile-and-Broadband-Statistics-and-Analyses</a>  |
| 10. | Nuevas tarifas para la navegación nacional<br><a href="https://www.granma.cu/cuba/2017-03-29/nuevas-tarifas-para-la-navegacion-nacional-29-03-2017-16-03-42">https://www.granma.cu/cuba/2017-03-29/nuevas-tarifas-para-la-navegacion-nacional-29-03-2017-16-03-42</a>  |
| 11. | El salario medio en Cuba aumenta un dólar en 2017 y ronda los 30 dólares al mes<br><a href="https://www.efe.com/efe/america/economia/el-salario-medio-en-cuba-aumenta-un-dolar-2017-y-ronda-los-30-dolares-al-mes/20000011-3729775">https://www.efe.com/efe/america/economia/el-salario-medio-en-cuba-aumenta-un-dolar-2017-y-ronda-los-30-dolares-al-mes/20000011-3729775</a> |
| 12. | Nota de prensa conjunta ETECSA-Google para anuncio de firma de Memorándum de Entendimiento 28 de marzo del 2019.<br><a href="https://www.eteesa.cu/inicio/nota_de_prensa_conjunta_eteesa_google/">https://www.eteesa.cu/inicio/nota_de_prensa_conjunta_eteesa_google/</a>  |
| 13. | National Plan for Economic and Social Development 2030 of Cuba: <a href="https://www.cepal.org/sites/default/files/courses/files/2.1plan-nacional-2030-citma.pdf">https://www.cepal.org/sites/default/files/courses/files/2.1plan-nacional-2030-citma.pdf</a>  |
| 14. | Infraestructura en Cuba: retos para el desarrollo futuro<br><a href="http://scielo.sld.cu/scielo.php?script=sci_arttext&amp;pid=S0252-85842020000200001">http://scielo.sld.cu/scielo.php?script=sci_arttext&amp;pid=S0252-85842020000200001</a>  |
| 15. | Informatización de la Sociedad en Cuba<br><a href="https://www.ecured.cu/Informatizaci%C3%B3n_de_la_Sociedad_en_Cuba">https://www.ecured.cu/Informatizaci%C3%B3n_de_la_Sociedad_en_Cuba</a>  |
| 16. | Políticas públicas de inclusión digital: El caso de América Latina y Cuba<br><a href="https://www.redalyc.org/pdf/161/16138590004.pdf">https://www.redalyc.org/pdf/161/16138590004.pdf</a>   |
| 17. | 2002: El proyecto futuro se transforma en una victoria<br><a href="https://www.uci.cu/universidad/noticias/2002-el-proyecto-futuro-se-transforma-en-una-victoria">https://www.uci.cu/universidad/noticias/2002-el-proyecto-futuro-se-transforma-en-una-victoria</a>  |
| 18. | SNet, la red informal que reemplazó a internet en Cuba, tropieza con nuevas leyes<br><a href="https://www.larepublica.co/globoeconomia/snet-la-red-informal-que-reemplazo-a-internet-en-cuba-tropieza-con-nuevas-leyes-2900292">https://www.larepublica.co/globoeconomia/snet-la-red-informal-que-reemplazo-a-internet-en-cuba-tropieza-con-nuevas-leyes-2900292</a>           |
| 19. | El régimen cubano reconoce que la exportación de servicios médicos es lo que más dinero le genera<br><a href="https://diariodecuba.com/cuba/1634127540_34773.html">https://diariodecuba.com/cuba/1634127540_34773.html</a>   |
| 20. | <a href="https://www.medicoscubanosonline.com/">https://www.medicoscubanosonline.com/</a>  |
| 21. | Telemedicine: health services & ICT<br><a href="http://www.rcei.uh.cu/index.php/RCEI/article/download/120/121">http://www.rcei.uh.cu/index.php/RCEI/article/download/120/121</a>   |

### 6.3.8 Infrastructure and Energy

| Transport                                 |   |
|---|---|
| Overview                                  | Inland transportation is mainly by car. The main public transportation is buses and taxis, and there is also a railroad (4,226km). There are several domestic air routes. |
| Leadership governance                     | Ministry of Transport (MITRANS)<br>Directorate General of Transportations (DGT)   |
| Major development partners                | JICA / UNDP / GIZ   |
| Energy and electricity                    |   |
| Overview                                  | Almost all primary energy is imported as fossil fuels. Over 80% of electricity is generated by fossil fuels.  |
| Carbon neutral national plan              | National Economic and Social Development Plan by 2030<br>Renewable energy generation target: 24% by 2030  |
| Leadership governance and utility company | Ministry of Energy and Mines (MINEM)<br>Electric Union of Cuba (UNE)  |
| Major development partners                | JICA / UNDP / GIZ   |

Source: JICA Study Team with reference to various websites of the government organization and international organization (WB / IEA / IRENA / US DOE).

### 6.3.9 Tourism

Canada is the largest international market for Cuba

|   |  |   |
|---|--|---|
| Number of international tourist arrivals (2019) |  | 4,263 thousand  |
| International Tourism Receipts (2018)           |  | USD 2,903 million   |
| Tourism Competitiveness Ranking (2019)          |  | N / A   |
| Tourism Dependency Index (2019)                 |  | N / A   |
| Govern-ment of Japan policy                     | Number of JICA projects in the last 10 years   | none  |
|   | References to the Country Assistance Policy  | none  |
|   | Interest in pilot projects   | N / A   |
| Tourism industry vulnerability                  | Contribution of Travel & Tourism to GDP (2019)   | 10.3% (17th out of 23 countries)  |
|   | Contribution of Travel & Tourism to employment (2019)  | 11.1% (17th out of 23 countries)  |
|   | Ratio of international spending (2019)   | 51% (17th out of 23 countries)  |
|   | Top 3 countries of origin of visitors (2019)   | Canada (26.20%)<br>USA (11.66%)<br>Russia (4.16%)   |
| Importance of tourism                           | Ratio of the budget amount of tourism-related ministries to the national budget amount (2019)            | N / A   |
|   | Whether or not it is mentioned as a priority sector in the National Economic and Social Development Plan | Yes<br>Plan name: Lineamientos de la Política Económica y Social del Partido y la Revolución para el periodo 2016-2021<br>Reference example: IX. Política para el Turismo (p. 36) |
|   | Existence of effective national tourism policies   | none  |

|  | / strategies / plans  |   |
|--|---|---|
| Impact of COVID-19   | Changes in the contribution of Travel & Tourism to GDP (2019 → 2020)        | -48.1% (20th out of 23 countries)                                 |
|  | Changes in the contribution of Travel & Tourism to employment (2019 → 2020) | -19.6% (20th out of 23 countries)                                 |
| Number of government support measures for the tourism sector |   | 4 (Fiscal policy: 1, Resumption of tourism: 1 Domestic travel: 2) |

Source: Survey Team

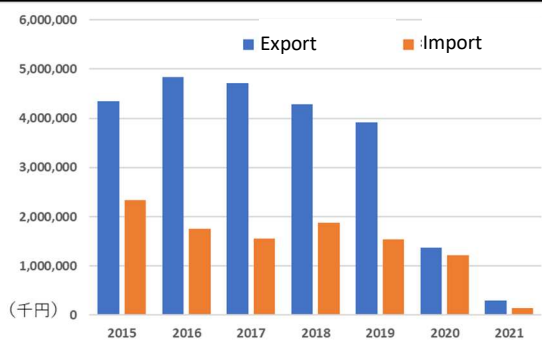
### 6.3.10 Public-private partnership

|  | item   | Contents     |
|--|--|--------------|
| No. of JICA Public-Private Partnership Projects (After 2012)                 | Cooperation preparatory survey (overseas investment and financing) (former PPP infrastructure project)           | 0 cases      |
|  | Overseas investment and loan   | 0 cases      |
|  | SME Partnership Promotion Survey (support for Small-sized Enterprise)  | 0 cases      |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for small- and medium- sized enterprise) | 0 cases      |
|  | SDGs Business Verification Survey with Private Sector (support for small- and medium- sized enterprise)          | 0 cases      |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for large enterprise)                    | 0 cases      |
|  | SDGs Business Verification Survey with Private Sector (support for large enterprise)                             | 0 cases      |
| Total number of Japanese private companies entering the market (2019 survey) | Total number of business locations   | 21 companies |
|  | Overseas branches of Japanese companies,   | 19 companies |
|  | Local corporations wholly owned by Japanese companies and their branches   | 0 companies  |
|  | Branch offices wholly owned by Japanese companies and their branches   | 0 companies  |
|  | joint ventures (local corporations in which Japanese companies have a direct or indirect stake of 10% or more)   | 0 companies  |
|  | joint ventures (Branch offices in which Japanese companies have a direct or indirect stake of 10% or more)       | 0 companies  |
|  | companies established overseas by Japanese nationals (in which Japanese nationals have a stake of 10% or more)   | 2 companies  |
|  | Unknown classification   | 0 companies  |
| Number of Japanese residents (2020 survey)                                   | Total  | 95 people    |
|  | Long-term residents  | 68 people    |
|  | Permanent resident   | 27 people    |
| Business Environment   | Doing Business 2020 Rank   | -----        |
| PPP Project  | Existence of PPP law scheme  | ×            |
|  | PPP project with Japanese companies  | 0 cases      |

Trade trends with Japan

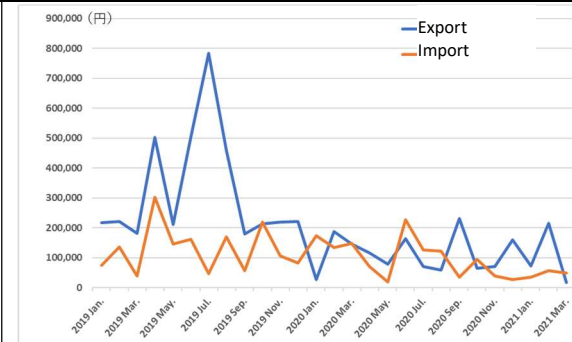
Total import / export (annual transition)

Blue – Export / Orange - Import

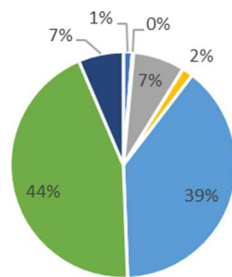


Total import / export (monthly transition)

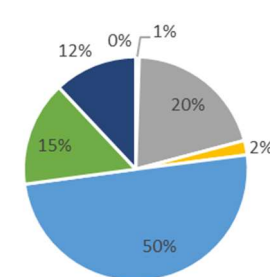
Blue – Export / Orange - Import



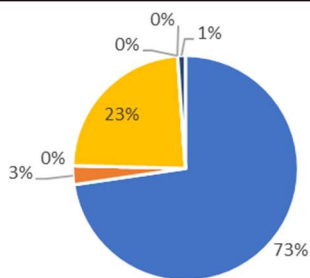
Export items (2019)



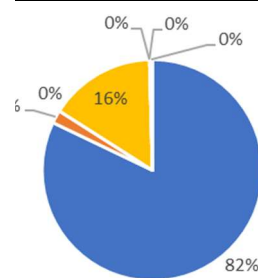
Export items (2020)



Imported items (2019)



Imported items (2020)



- Food
- Raw Materials
- Chemical Products
- Products by Raw Material
- Transportation Equipment
- Machinery/Electronics
- Others

Gathering information about the PPP system

| N°  | Task Item   | Inquiries/comments/status<br>Title of submitted file   | Source/URL  |
|-----|---|--|---|
| 1   | <b>PRIORITY 4_PPP Sector</b>  |  |   |
| 1.1 | PPP Projects in selective countries<br>PPP rules and regulations in Central America and Caribbean Countries | In the research carried out, no regulations or laws related to PPPs were found, however there are some studies that analyze the possibilities of implementing PPPs in Cuba - Alianzas público-privadas en Cuba: retos y posibilidades  | <a href="http://scielo.sld.cu/pdf/eyd/v165s2/0252-8584-eyd-165-s2-e2.pdf">http://scielo.sld.cu/pdf/eyd/v165s2/0252-8584-eyd-165-s2-e2.pdf</a>   |
| A   | PPP laws and Regulations<br>if there is any, when, and how  | In water and sanitation, as well as in power generation from renewable sources, there is private participation, always under the regulations of the Law for Foreign Investment (Ministry of Justice, 2014). This has been done in the form of concessions, both in the form of administration contracts, which is the case of Aguas de La Habana, and in the form of Building, Operation and Transfer (BOT) in some cases of photovoltaic parks and wind farms. It is not possible to determine, given that the contracts are not public, how close they are to the PPP modality.<br>(Page 16)   | <a href="http://scielo.sld.cu/pdf/eyd/v165s2/0252-8584-eyd-165-s2-e2.pdf">http://scielo.sld.cu/pdf/eyd/v165s2/0252-8584-eyd-165-s2-e2.pdf</a>   |
|     |   | Law No. 118 on Foreign Investment  | <a href="http://www.granma.cu/file/pdf/2014/04/16/G_2014041609.pdf">http://www.granma.cu/file/pdf/2014/04/16/G_2014041609.pdf</a>   |
| B   | PPP Unit Organization<br>if there is any, how structured  | For the concession structure:<br>If the objective of the approved investment is the management of a public service, the realization of a public work or the exploitation of a property in the public domain, the Council of Ministers, once approved by the Council of State, grants the corresponding administrative concession. , under the terms and conditions that it establishes, in accordance with the provisions of current legislation.<br>(Law No. 118 on Foreign Investment - Article 22.1 - Page 5)   | <a href="http://www.granma.cu/file/pdf/2014/04/16/G_2014041609.pdf">http://www.granma.cu/file/pdf/2014/04/16/G_2014041609.pdf</a>   |
| C   | PPP sectors<br>in what sectors are the PPPs allowed   | Information published by the world bank<br>There are 8 active projects in: the electrical sector, telecommunications, water and sewerage, airports and railways.<br><br>See file "PPP Projects - Data + G - F.xlsx" sheet "Resume PPP"   | <a href="https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CU&amp;header=true">https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CU&amp;header=true</a>   |
| D   | Proposal Types (Solicited or Unsolicited)<br>unsolicited  | There is no public information on the subject.   |   |
| E   | PPP Forms<br>BOT,BTO,DB,,,what form are allowed   | The presence of the BOT format is presumed, but cannot be assured, due to the lack of public information on the concession contracts.  | <a href="http://scielo.sld.cu/pdf/eyd/v165s2/0252-8584-eyd-165-s2-e2.pdf">http://scielo.sld.cu/pdf/eyd/v165s2/0252-8584-eyd-165-s2-e2.pdf</a>   |
| F   | PPP types<br>Availability payment, service purchase   | There is no public information on the subject.   |   |
| G   | PPP Project Trends<br>how much PPP projects in the last 10 years  | 1 (2010 to 2020)<br>- Cuba railway management contract (2019)<br><br>See file "210520_PPP Database"  | <a href="https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true">https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true</a> |
| H   | Participation of Japanese firms in PPP Projects<br>if any (check news source)                               | No information found   |   |
|     | Any notable points for each country<br>if any   | According to CAF, the use of Production Sharing Agreements (PSA) is mentioned<br>In these agreements, a State-Owned Company, generally called the National Resource Management Company or "National Resource Company" (NRC), takes the role of concessionaire and the investor that of contractor. The main disadvantage of the PSA is that the state can enter into a conflict between its economic interest and its role as regulator.<br>PSA tends to be more popular in developing countries. The Latin American countries that have used the PES model are: Aruba, Belize, Cuba, Guatemala, Guyana, Honduras, Panama, Suriname and Uruguay. | <a href="https://scioteca.caf.com/bitstream/handle/123456789/1225/Asociacion_Publico-Privada_en_Infraestructuras_Energeticas_Experiencias_en_America_Latina.pdf?sequence=4">https://scioteca.caf.com/bitstream/handle/123456789/1225/Asociacion_Publico-Privada_en_Infraestructuras_Energeticas_Experiencias_en_America_Latina.pdf?sequence=4</a>   |

Source: Survey Team

## 7. Dominica

### 7.1 Country overview

#### 7.1.1 Basic information

Dominica (English: Commonwealth of Dominica) is a republican territory that covers the entire Dominica island, located in the northernmost part of the Windward Islands, which constitutes the West Indies of the Caribbean Sea. It is an island country, with French Guadeloupe in the northwest and Martinique in the southeast across the sea. The capital is Roseau. The country was a former British colony and is now a member of the Commonwealth of Nations. This island, rich in nature, is home to a wide variety of plants in the Caribbean and is known as the "Caribbean Botanical Garden." It is also one of the few Caribbean countries in which the indigenous people of the Caribbean (Kalinago) live. The main industry was agriculture centered on banana exports, but in recent years the banana industry has been declining due to the abolition of the EU's banana tariff incentive system. The government is focusing on the fishery industry and tourism industry, especially ecotourism, in order to diversify the economy, but it has not reached an industry of a scale that can replace agriculture. Tourism lags behind other Caribbean islands, but it is also a promising industry for the country. There are two airports on the island, Kanefield Airport and Melville Hall Airport, but they can only arrive and depart with small propeller planes. You can reach Dominica by liaison from Barbados or Antigua.<sup>9</sup>

#### 7.1.2 General circumstances

|             |   |                 |   |
|-------------|---|-----------------|---|
| 1 area      | 750 square kilometers (almost the same as Amami Oshima) | 2 Population    | 71,000 people (2018 World Bank)                                   |
| 3 Capital   | Roseau  | 4 ethnic groups | African descent (86.6%), mixed race (9.1%), Kalinago (2.9%), etc. |
| 5 languages | English (official language), French Patois              | 6 religion      | Christianity (Catholic, Protestant, etc.), etc.                   |

Source: Ministry of Foreign Affairs HP Dominica Basic Data

#### 7.1.3 Economic overview

|                          |  |                              |   |
|--------------------------|--|------------------------------|---|
| 1 Major industry         | Agriculture (banana, coconut, citrus), tourism, manufacturing (soap, etc.)   | 2 GNI<br>3 GNI / person      | US \$ 508 million (World Bank 2018)<br>US \$ 12,380 (2019, WDI) |
| 4 Economic growth rate   | 2.26% (2018 World Bank)  | 5 Unemployment rate          | unknown   |
| 6 Price increase rate    | 0.8% (2018), 0.96% (2019 estimate) (IMF)   |                              |   |
| 7 Total trade amount     | Export: US \$ 19 million (2018 WTO)<br>Import: US \$ 270 million (2018 WTO)  |                              |   |
| 8 Major trade items      | Export: soap, scrap powder, banana, citrus<br>Imports: Fuels, groceries, sweetened beverages, machinery  |                              |   |
| 9 Major trading partners | Exports: Trinidad and Tobago, Jamaica, Saint Kitts and Nevis, EU<br>Imports: USA, Trinidad and Tobago, EU, China (2012, WTO)   |                              |   |
| 10 currencies            | Eastern Caribbean Dollar (EC \$)   | 11 Foreign currency reserves | na  |
| 12 National budget       | USD404,428,226 (2019)  | 13 External debt balance     | na  |
| 14 Economic overview     | The main industries are service industries such as tourism, which accounts for more than 50% of GDP, and small-scale manufacturing industries centered on agro-industry such as agriculture and soap production. Although it is classified as a middle- and high-income country, it is vulnerable to natural disasters such as hurricanes, and the tourism industry, which is a major industry, is easily affected by external factors such as being easily influenced by global economic trends. In particular, the cost of recovery from natural disasters is a major obstacle to the country's economic growth. Due to the terrorist attacks on the United States in 2001 and the global financial crisis in 2008, the tourism industry was sluggish and the domestic economy had long been negatively grown. In addition, damage caused by natural disasters has occurred frequently, and the 2004 earthquake caused enormous infrastructure damage, and the flood damage caused by the tropical storm "Erica" in 2015 |                              |   |

<sup>9</sup>This is the only country in Eastern Caribbean that has the remaining indigenous Caribbeans who lived before Columbus, and now more than 3,000 people live there with 3,700 acres of territory on the northeastern coast of the island.



|  |   |
|--|---|
|  | was equivalent to 90% of GDP in September 2017. Hurricane Maria in the month suffered catastrophic damage of about US \$ 1.3 billion (about 216% of GDP), with GDP growth of -2.7% (2015 Bank) and -6.8% (2017 Bank). I was very depressed. |
|--|---|

Source: Ministry of Foreign Affairs HP Dominica Basic Data

## 7.1.4 Country-specific development cooperation policy

### (1) Government of Japan Development Cooperation Policy by Country

**Table 7-1 Overview of Japan's ODA to Dominica**

|  |  |
|--|--|
| <b>1. 1. Overview</b>  |  |
| Japan's economic cooperation with Dominica began with the acceptance of trainees in 1983, the Grant-in-Aid for Fisheries in 1993, the dispatch of experts in 1994, and the Grant-in-Aid for Grassroots Human Security in 2000. In 2001, the Japan Overseas Cooperation Volunteers (JOCV) dispatch arrangement was signed, and JOCV has been dispatched since 2003. Japan is currently implementing technical cooperation and grant-in-aid for aid in the fields of disaster prevention / environment and fisheries as one of the major donor countries.  |  |
| <b>2. 2. Aim of development cooperation</b>  |  |
| There are many island nations in the Caribbean region where the members of the Caribbean Community (Calicom) including Dominica are located, and natural disasters such as hurricanes, earthquakes, and tsunamis occur frequently, and the sustainable use of marine biological resources. It has something in common with Japan in that it promotes the above. In addition to being vulnerable to climate change and natural disasters, Calicom member countries are based on industries that have a small population and economy and are susceptible to external factors such as agriculture, fisheries, and tourism. All 14 countries are included in the list of small island developing states published by the United Nations Secretariat. In order to overcome the vulnerabilities peculiar to small island developing states in the Calicom countries, it is necessary to cooperate by utilizing Japan's technology and knowledge in addition to deepening bilateral relations and socio-economics of each country. It is important from the viewpoint of financial stability and sustainable growth of the entire region.             |  |
| <b>3. 3. Basic policy</b>  |  |
| In the Development Cooperation Charter, even if the per capita income is at a certain level, for countries with special vulnerabilities such as small island developing states, necessary cooperation will be provided according to the actual development needs and burden capacity of each country. For the Caribbean Community (Calicom) member countries, the first is based on the Japan-Calicom Joint Ministerial Statement adopted at the 4th Japan-Calicom Foreign Ministers' Meeting held in November 2014. In order to "cooperate for sustainable development including overcoming vulnerabilities peculiar to small island developing states", we will develop cooperation that makes use of Japan's technology and knowledge. In accordance with these policies, Dominica will be supported to overcome the vulnerabilities peculiar to small island developing states by supporting environmentally friendly sustainable social development and disaster prevention efforts. We also reaffirmed that we will cooperate in accordance with this policy at the 5th Japan-Calicom Foreign Ministers' Meeting held in September 2016. |  |
| <b>4. Priority areas</b>   |  |
| (1) Disaster prevention / environment: While strengthening the ability to respond to frequent hurricanes and natural disasters such as floods, small island developing states in the fields of climate change countermeasures, conversion to renewable energy, promotion of energy conservation, waste management, etc. Provide the support necessary to overcome the vulnerabilities peculiar to developing countries. Also pay attention to sharing knowledge with other Calicom member countries.   |  |
| (2) Fisheries: In line with Japan's shared goal of sustainable use of marine biological resources, we will continue to cooperate for the sustainable development and management of the fishery industry for industrial diversification.  |  |

Source: Ministry of Foreign Affairs HP Dominica Country Data Collection 2017

**Table 7-2 National Development Cooperation Policy for Dominica (September 2016)**

|   |  |
|---|--|
| <b>3. 3. Priority field (medium goal)</b> |  |
| (1) Disaster prevention / environment     | We are frequently hit by natural disasters such as hurricanes and floods, and we will provide support in the fields of disaster prevention and climate change countermeasures, which are urgent issues. Cooperate to promote the introduction of renewable energy and energy conservation.   |
| (2) Fisheries                             | In the Dominican Government Medium-Term Plan ("Growth and Social Protection Strategy 2014-2018"), the fishery plays an important role in food security and brings about socio-economic stability through job creation from the perspective of poverty reduction. Furthermore, it is positioned as an important industry that is expected to make a significant contribution to GDP in the future. Draw cooperation for sustainable development and management of the fishery industry. We will continue to implement it. |
| (3) Others                                | Waste management is particularly important for small island nations whose main industry is the tourism industry, and promotes the 3Rs (reduction of waste generation, reuse of resources and products, and recycling). And the issue is how to properly manage the disposal site.  |

Source: Survey Team

## (2) Survey on COVID-19 by development partners

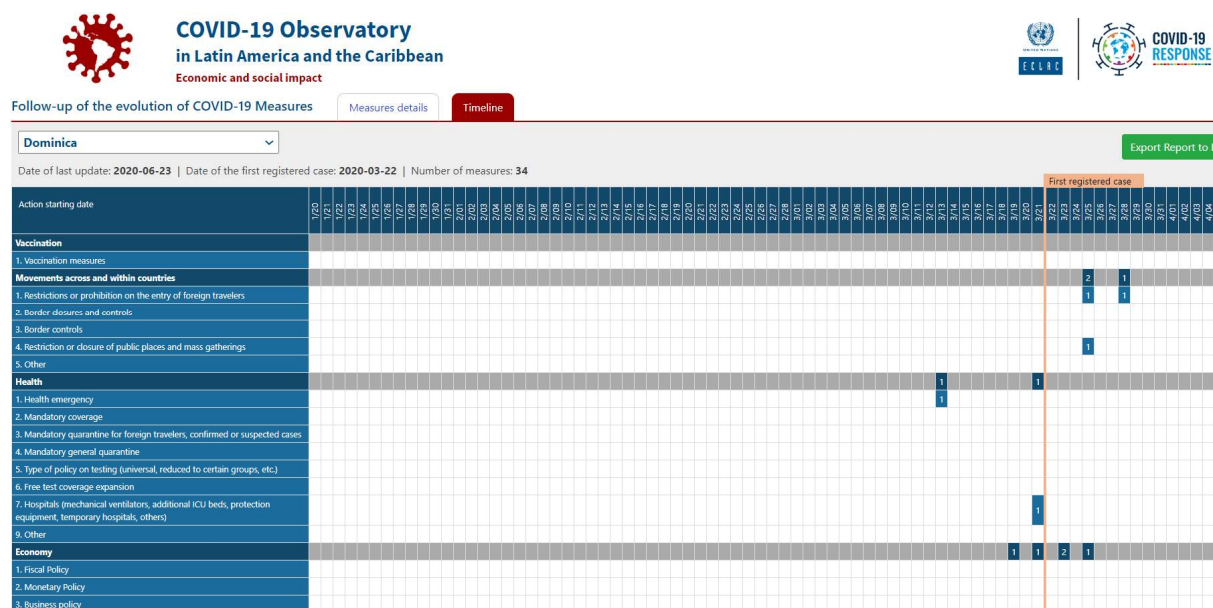
We extracted sector names and specific quantitative figures that have a large impact on the country-specific analysis described in various reports of development partners. Reports from the World Bank, OECD, BCIE, SICA, and the Ministry of Economy, Trade and Industry of Japan suggest the importance of introducing digitalization and innovation (Fintech, Aggrotech, Autotech, etc.), and incorporate the survey results of these development partners. I arranged it accordingly.

World Bank: "Growth and Revitalization" 2021 Semi-Annual Economic Report (March 2021)

- ✓ OECD: COVID-19 in LAC, Regional socio-economic implications and policy priorities (December 2020)
- ✓ BCIE: Impacto Económico del COVID-19 (April 2020)
- ✓ SICA: Estimación del Impacto Económico del COVID-19 en Centroamérica y República Dominicana (April 2020)
- ✓ Ministry of Economy, Trade and Industry of Japan: "Economic and Industrial Policy Based on the Impact of the New Corona Virus" (June 2020), Accelerating Digitization and Onlineization, Gig Economy, Innovation in the Transition to a New Everyday Life 1) Medical care / health, 2) Digital: Infrastructure development premised on the arrival of a digital society, 3) Green: Response to climate change problems, Energy security, 4) Emphasizes resilience.

### 7.1.5 Policies for COVID-19 measures taken by governments of each country

Various policies for COVID-19 taken by the government are described on the ECLAC homepage "COVID-19 Observatory" by country, time series, and field, and can be analyzed.



Source: <https://cepalstat-prod.cepal.org/forms/covid-countrysheet/index.html?table=2&country=DMA>

In this survey, the 16 policies implemented in Dominica listed on this website were classified by sector as much as possible.

### 1) Infection spread and alleviation of aggravation and death

No material was available.

## 2) Support for affected industries and people

**Table 7-3 Support for Affected Industries and People (Dominica)**

| Various government policies (COVID-19 Observatory for LAC) |  |    |  |
|--|--|----|--|
| Socioeconomic policy                                       |  | 1  |  |
| Health care & nutrition                                    |  | 3  |  |
| Education  |  | 2  |  |
| Agriculture & rural development                            |  | 0  |  |
| Private sector   |  | 9  |  |
| Environment & disaster prevention                          |  | 0  |  |
| Governance and social security                             |  | 1  |  |
| DX and innovation  |  | 0  |  |
| Infrastructure & energy                                    |  | 0  |  |
| Tourism  |  | 0  |  |
| PPP  |  | 0  |  |
| Others (b)   |  | 0  |  |
| total  |  | 16 |  |

Source: Survey Team

## 3) Arrangement of various policies for COVID-19 taken by the government

COVID-19 Observatory for Latin America and Caribbean (ECLAC) organized by governments

**Table 7-4 Government-directed COVID-19 Policy Categories (Dominica)**

### Follow-up of the evolution of COVID-19 Measures

| Vaccination   | Economy  | Social protection   |
|---|--|---|
| 1. Vaccination measures   | 1. Fiscal Policy   | 1. Cash transfers (new transfers, increase in existing transfers, expansion of cash transfers to new recipients, early disbursement of transfers) |
| <b>Movements across and within countries</b>  | 2. Monetary Policy   | 2. Food transfers / In-kind transfers   |
| 1. Restrictions or prohibition on the entry of foreign travelers  | 3. Business policy   | 3. Guarantee of basic services  |
| 2. Border closures and controls   | 4. Restriction of economic activity (including shops and shopping centers)                             | <b>Education / schools</b>  |
| 3. Border controls  | 5. Price and quantity controls   | 1. Suspension of classes  |
| 4. Restriction or closure of public places and mass gatherings  | 6. Economic Stimulus (includes aggregate value of fiscal measures and separately of credit guarantees) | 2. Provision of tools for distance learning (online platforms, TV, radio, distance-learning materials)  |
| 5. Other  | 7. Regulation of the personal hygiene and cleaning products market                                     | 3. Maintenance of school feeding programme (indicating under which modalities)  |
| <b>Health</b>   | 8. Debt relief and suspension of credit payments (individuals, microentrepreneurs)                     | <b>Gender</b>   |
| 1. Health emergency   | 9. Other   | 1. Gender-based violence against women  |
| 2. Mandatory coverage   | <b>Labor</b>   | 2. Care economy   |
| 3. Mandatory quarantine for foreign travelers, confirmed or suspected cases                                   | 1. Labor Protection  | 3. Employment and income generation   |
| 4. Mandatory general quarantine   | 2. Elective work leave   | 4. Benefits, transfers and other social protection measures   |
| 5. Type of policy on testing (universal, reduced to certain groups, etc.)                                     | 3. Reduction of working hours  | 5. Women's participation in the digital era   |
| 6. Free test coverage expansion   | 4. Prohibition of dismissal from work  | 6. Other  |
| 7. Hospitals (mechanical ventilators, additional ICU beds, protection equipment, temporary hospitals, others) | 5. Other   |   |

Source: Survey Team

## 7.2 Macroeconomic analysis and selection of priority countries

### 7.2.1 Macroeconomic analysis

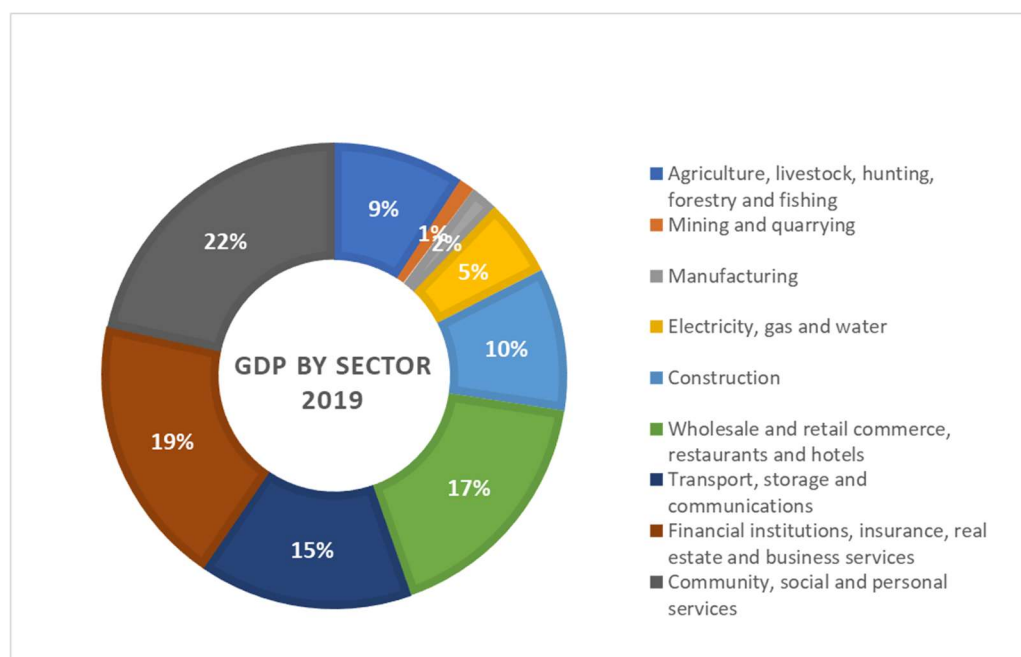
#### (1) Industrial composition

**Table 7-5 Industrial Composition (Dominica)**

Table: GDP by sector (En millones de dólares del Caribe Oriental a precios constantes de 2006)

|  | 2011    | 2012    | 2013  | 2014    | 2015    | 2016    | 2017  | 2018  | 2019a/ | 2020 b/ |
|--|---------|---------|-------|---------|---------|---------|-------|-------|--------|---------|
| Agriculture, livestock, hunting, forestry and fishing                | 115.8   | 124.8   | 130.6 | 130.4   | 126.7   | 138.5   | 112.1 | 81.4  | 89.0   | 93.7    |
| Mining and quarrying   | 10.1    | 9.8     | 10.4  | 9.9     | 8.8     | 10.4    | 9.9   | 11.4  | 10.6   | 4.6     |
| Manufacturing  | 33.2    | 35.1    | 36.2  | 33.7    | 30.5    | 24.3    | 19.7  | 17.4  | 18.8   | 19.7    |
| Electricity, gas and water   | 54.1    | 54.8    | 54.0  | 55.8    | 59.0    | 60.9    | 47.9  | 40.2  | 52.4   | 55.7    |
| Construction   | 55.7    | 49.7    | 45.7  | 49.9    | 40.4    | 54.8    | 52.2  | 103.5 | 97.0   | 42.1    |
| Wholesale and retail commerce, restaurants and hotels                | 167.8   | 161.0   | 151.0 | 160.1   | 148.7   | 145.3   | 125.9 | 160.0 | 168.1  | 122.9   |
| Transport, storage and communications                                | 147.8   | 145.9   | 148.8 | 153.1   | 146.8   | 138.3   | 136.6 | 137.2 | 145.9  | 99.6    |
| Financial institutions, insurance, real estate and business services | 178.7   | 177.8   | 175.7 | 180.0   | 182.7   | 189.4   | 176.5 | 174.5 | 184.0  | 186.7   |
| Community, social and personal services                              | 243.3   | 242.0   | 246.1 | 265.1   | 271.1   | 278.9   | 292.5 | 206.2 | 211.3  | 214.3   |
| Total  | 1,006.5 | 1,000.9 | 998.5 | 1,038.0 | 1,014.9 | 1,040.8 | 973.3 | 931.8 | 977.1  | 839.3   |

Source: ECLAC



Source: Survey Team

## (2) Trends in major economic indicators

**Table 7-6 Trends in Major Economic Indicator (Dominica)**

Table 1 DOMINICA: MAIN ECONOMIC INDICATORS (Annual growth rates)

|  | 2011   | 2012   | 2013   | 2014   | 2015   | 2016   | 2017   | 2018   | 2019a/ | 2020 b/ |
|--|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------|
| Gross domestic product (Annual growth rates c/)                                      | -0.2   | -1.1   | -1.0   | 4.4    | -2.7   | 2.6    | -6.8   | 2.3    | 3.6    | -15.4   |
| Per capita gross domestic product (Annual growth rates c/)                           | -0.3   | -1.1   | -1.1   | 4.3    | -2.8   | 2.4    | -7.0   | 2.0    | 3.3    | -15.7   |
| Gross domestic product, by sector (Annual growth rates c/)                           |        |        |        |        |        |        |        |        |        |         |
| Agriculture, livestock, hunting, forestry and fishing                                | 7.3    | 7.8    | 4.6    | -0.2   | -2.8   | 9.3    | -19.1  | -27.4  | 13.3   | 5.3%    |
| Mining and quarrying   | 10.0   | -3.1   | 6.0    | -5.0   | -10.9  | 17.6   | -4.8   | 15.0   | 7.0    | -56.6%  |
| Manufacturing  | -5.9   | 5.6    | 3.3    | -6.8   | -9.5   | -20.6  | -18.8  | -11.6  | 8.0    | 4.8%    |
| Electricity, gas and water   | 0.4    | 1.2    | -1.4   | 3.2    | 5.9    | 3.2    | -21.5  | -16.0  | 26.5   | 6.3%    |
| Construction   | 1.4    | -10.9  | -8.0   | 9.2    | -19.0  | 35.6   | -4.9   | 98.3   | 6.7    | -56.6%  |
| Wholesale and retail commerce, restaurants and hotels                                | 4.5    | -4.1   | -6.2   | 6.1    | -7.1   | -2.3   | -13.4  | 27.1   | 10.6   | -26.9%  |
| Transport, storage and communications  | 0.7    | -1.3   | 2.0    | 2.9    | -4.1   | -5.8   | -1.2   | 0.4    | 8.2    | -31.7%  |
| Financial institutions, insurance, real estate and business services                 | -0.1   | -0.5   | -1.2   | 2.5    | 1.5    | 3.7    | -6.8   | -1.1   | 4.7    | 1.5%    |
| Community, social and personal services  | -2.8   | -0.5   | 1.7    | 7.7    | 2.3    | 2.9    | 4.9    | -29.5  | -0.7   | 1.4%    |
| Balance of Payments (Millions of dollars)  |        |        |        |        |        |        |        |        |        |         |
| Current account balance  | -70.6  | -84.2  | -49.4  | -28.2  | -25.2  | -44.2  | -46.2  | -239.1 | -206.5 | -97.0   |
| Goods balance  | -165.4 | -146.6 | -140.3 | -164.1 | -160.5 | -162.6 | -161.3 | -272.9 | -249.8 | -180.4  |
| Exports, f.o.b.  | 33.5   | 36.7   | 38.4   | 38.5   | 34.9   | 25.4   | 13.0   | 11.6   | 21.2   | 18.4    |
| Imports, f.o.b.  | 198.9  | 183.3  | 178.6  | 202.6  | 195.4  | 188.0  | 174.3  | 284.5  | 271.1  | 198.7   |
| Services trade balance   | 88.9   | 55.1   | 90.1   | 105.8  | 102.2  | 102.8  | 58.9   | 9.7    | 5.3    |         |
| Income balance   | -10.5  | -9.5   | -19.5  | -16.6  | -18.9  | -21.1  | 1.8    | -0.6   | 2.1    |         |
| Net current transfers  | 16.5   | 16.8   | 20.3   | 46.8   | 52.0   | 36.7   | 54.3   | 24.7   | 35.9   |         |
| Capital and financial balance (Millions of dollars)                                  |        |        |        |        |        |        |        |        |        |         |
| Net foreign direct investment d/   | 34.6   | 58.5   | 23.3   | 14.1   | 18.7   | 41.4   | 22.7   | 76.5   | 32.6   |         |
| Other capital movements d/   | 42.5   | 28.6   | 19.6   | 28.6   | 32.7   | 98.5   | 13.8   | 141.7  | 159.7  |         |
| Foreign remittance from abroad for 2019 and 2020                                     | 63.6   | 76.8   | 23.4   | 26.0   | 32.4   | 118.8  | 38.4   | 217.6  | 194.4  |         |
| Microfinance dispatched and the sectors that received microfinance for 2019 and 2020 |        |        |        |        |        |        |        |        |        |         |

Source: Economic Survey of Latin America and the Caribbean 2020: Main conditioning factors of fiscal and monetary policies in the post-COVID-19 era

### 7.2.2 Impact analysis and identification of key sectors

#### (1) Impact assessment results for each sector by AHP analytic hierarchy process based on economic indicators

**Table 7-7 Results of Sector Impact Analysis by COVID-19 (Dominica)**

| ECLAC category   | Changes around COVID-19 | Trends before COVID-19 | Total GDP ratio of the sector | comprehensive evaluation |   |
|--|-------------------------|------------------------|-------------------------------|--------------------------|---|
| Importance (weight)  | 0.4590                  | 0.0660                 | 0.0750                        |                          |   |
| Agriculture, livestock, hunting, forestry and fishing                | 2                       | 3                      | 4                             | 0.031                    | 8 |
| Mining and quarrying   | 9                       | 8                      | 1                             | 0.103                    | 2 |
| Manufacturing  | 3                       | 1                      | 2                             | 0.035                    | 7 |
| Electricity, gas and water   | 1                       | 4                      | 3                             | 0.021                    | 9 |
| Construction   | 9                       | 9                      | 5                             | 0.111                    | 1 |
| Wholesale and retail commerce, restaurants and hotels                | 6                       | 7                      | 7                             | 0.082                    | 4 |
| Transport, storage and communications                                | 7                       | 5                      | 6                             | 0.087                    | 3 |
| Financial institutions, insurance, real estate and business services | 4                       | 6                      | 8                             | 0.062                    | 6 |
| Community, social and personal services                              | 5                       | 2                      | 9                             | 0.068                    | 5 |

Source: Survey Team

#### 1) ECLAC Sector Classification Amendments to the Sector Classification

In line with the method described in the main volume, the Sector Classification is divided into the Vertical Sector and the Cross-Cutting Sector, the ECLAC classification sector is allocated to the Vertical Sector Classification, and the evaluation of various policies related to COVID-19 taken by the government along with the results of the partner survey and the indicators of the national development

cooperation policy, the ranking of priority sectors are calculated using the four indicators, which are described in the table below.

**Table 7-8 Ranking of Priority Sectors (Dominica)**

|                                   | Economic Indicator Analysis | Government Policy on COVID-19 | Survey on COVID-19 by Development Partners | Country Development Cooperation Policy | Base Case |   | Priority |
|-----------------------------------|-----------------------------|-------------------------------|--|--|-----------|---|----------|
| Importance (weight)               | 0.6000                      | 0.2000                        | 0.1000                                     | 0.1000                                 |           |   |          |
| Social and Economic Policy        | 0.0000                      | 0.0125                        | 0.0000                                     | 0.0000                                 | 0.0125    |   | ○        |
| Health and Nutrition              | 0.0384                      | 0.0375                        | 0.0000                                     | 0.0000                                 | 0.0759    | 5 |          |
| Education                         | 0.0297                      | 0.0250                        | 0.0000                                     | 0.0000                                 | 0.0547    | 6 |          |
| Agriculture and Rural Development | 0.0675                      | 0.0000                        | 0.0125                                     | 0.0167                                 | 0.0966    | 4 |          |
| Manufacturing                     | 0.1277                      | 0.1125                        | 0.0125                                     | 0.0167                                 | 0.2694    | 2 | ○        |
| Environment/ Disaster Management  | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0333                                 | 0.0333    |   | ○        |
| Governance and Security           | 0.0000                      | 0.0125                        | 0.0000                                     | 0.0000                                 | 0.0125    |   | ○        |
| DX Innovation                     | 0.0000                      | 0.0000                        | 0.0375                                     | 0.0000                                 | 0.0375    |   | ○        |
| Infrastructure and Every          | 0.2747                      | 0.0000                        | 0.0125                                     | 0.0167                                 | 0.3039    | 1 | ○        |
| Tourism                           | 0.0620                      | 0.0000                        | 0.0250                                     | 0.0167                                 | 0.1037    | 3 | ○        |
| Public-Private Partnership        | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0000                                 | 0.0000    |   |          |

Source: Survey Team

## (2) Sensitivity analysis

### 1) Analysis case settings

Based on the above methodology, the following case settings were made.

**Table 7-9 Sensitivity Analysis Case-based Weighting Settings (Dominica)**

|  | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|--|-----------|------------------------|------------------------|------------------------|
| Economic indicator analysis  | 0.6       | 0.6                    | 0.5                    | 0.5                    |
| Investigation and arrangement of various policies for COVID-19 taken by the government | 0.2       | 0.1                    | 0.1                    | 0.1                    |
| Development partner survey results   | 0.1       | 0.2                    | 0.2                    | 0.3                    |
| Country-specific development cooperation policy  | 0.1       | 0.1                    | 0.2                    | 0.1                    |

Source: Survey Team

### 2) Summary of sensitivity analysis

The results of each sensitivity analysis are as summarized below. Sensitivity analysis did not show much change, which was close to the result of the base case.

**Table 7-10 Summary of Sensitivity Analysis Results (Dominica)**

|                                   | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|-----------------------------------|-----------|------------------------|------------------------|------------------------|
| Social and economic policy        |           |                        |                        |                        |
| Health care / nutrition           | 5         | 5                      | 5                      | 5                      |
| education                         | 6         | 6                      | 6                      | 6                      |
| Agriculture / rural development   | 4         | 4                      | 4                      | 4                      |
| Manufacturing industry            | 2         | 2                      | 2                      | 2                      |
| Environment / disaster prevention |           |                        |                        |                        |
| Governance and citizen security   |           |                        |                        |                        |
| DX / Innovation                   |           |                        |                        |                        |
| Infrastructure and Energy         | 1         | 1                      | 1                      | 1                      |
| sightseeing                       | 3         | 3                      | 3                      | 3                      |
| Public-private partnership        |           |                        |                        |                        |

Source: Survey Team

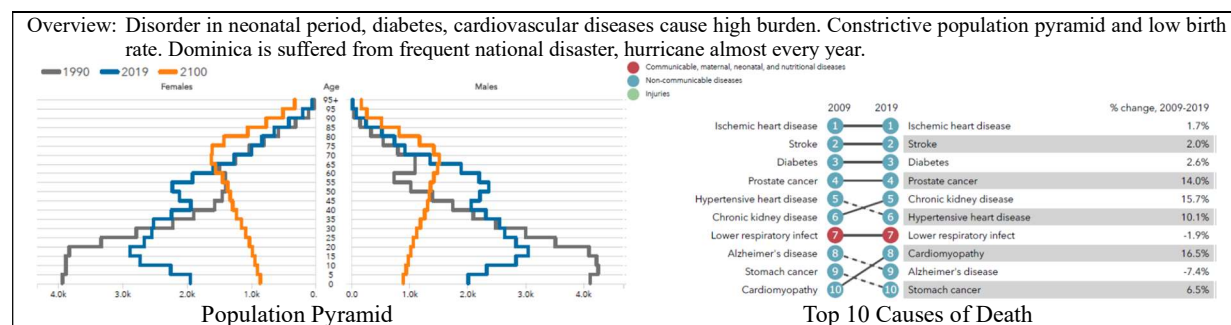
### **(3) Selection of priority sectors by country**

From the above results, 1) social / economic policy, 2) manufacturing industry, 3) environment / disaster prevention, 4) governance / citizen security, 5) DX / innovation, 6) infrastructure / energy, 7) tourism, 8) public-private partnership are selected priority sectors.



## 7.3 Country-specific information by sector

### 7.3.1 Health care / nutrition



| Demography                                      |   |   |  |   |                                   |                                       |  |
|---|---|---|--|---|-----------------------------------|---------------------------------------|--|
| Population                                      | Urban population (%)                      | Urban population growth (%)             | Life Expectancy (years)                        |   |                                   | Population ≥ 65 (%)                   |  |
| 71,625  | 70.79                                     | 0.69                                    | Male   | Female  | Both                              |                                       |  |
| -   | -   | -                                       | -  | -   | -                                 |                                       |  |
| Maternal, Newborn and Child Health              |   |   |  |   |                                   |                                       |  |
| Total fertility rate                            | Neonatal mortality (per 1,000 livebirths) | Under 5mortality (per 1,000 livebirths) | Maternal mortality (per 100,000 livebirths)    | Antenatal care ≥ 4 (%)                          | Immunization (1yr)                |                                       |  |
| -   | 27.30                                     | 34.00                                   | 251  | 85  | DTP (%)                           | MCV1 (%)                              |  |
| -   | -   | -                                       | -  | -   | 94                                | 84                                    |  |
| Nutrition                                       |   |   |  | Health Finance                                  |                                   |                                       |  |
| Under 5 Children                                |   | Adult overweight (%)                    |  | Current health expenditure per capita (USD PPP) |                                   | Current health expenditure to GDP (%) |  |
| Stunting (%)                                    | Overweight (%)                            | Male                                    | Female   |   |                                   | Out-of-pocket expenditure (%)         |  |
| -   | -   | 35                                      | 30   | 636   |                                   | 6.59                                  |  |
| -   |   | -                                       |  | -   |                                   | 31                                    |  |
| Health Service Provision (per 1,000 population) |   |   | COVID-19 related Indicators as of January 2022 |   |                                   |                                       |  |
| Hospital beds                                   | Doctors                                   | Nurses                                  | Total confirmed cases (per million)            | Total death (per million)                       | Total number of tests (per 1,000) | People completed vaccination (%)      |  |
| 3.80  | 1.1                                       | 6.4                                     | 115,681.98                                     | 665.08  |                                   | 39.93                                 |  |

Source: Graphs=Institute for Health Metrics and Evaluation, County Profile; Demography, Total fertility rate, Neonatal mortality, under-5 mortality, Health finance= World Development Indicators, the World Bank (Accessed on Aug 2021); Maternal mortality= UNICEF (Sep 2019); Antenatal care, Immunization, Nutrition, Health service provision,= OECD/The World Bank (2020), Health at a Glance: Latin America and the Caribbean 2020; COVID-19 related indicators= Our World in Data (Accessed on Jan 2022)

| Health                                  |   |
|---|---|
| Leadership/ Governance                  | Responsible Agency: Ministry of Health, Wellness and New Health Investment (Under construction as of 5 Nov 2021)<br>Centralized<br>Major Relevant Policies: National Strategic Plan for Health 2010- 2019 |
| Service Providing System                | Public sector mainly provides health services with partially involvement of NGO at primary level. Developing national health insurance scheme supported by PAHO   |
| Health Finance                          | Government fund/ free-of-charge at primary level  |
| Human Resource for Health               | Qualification needs to be improved though quantity is sufficient.   |
| IT/ Digital Health                      | Relevant policy is under development.   |
| Drugs/ Medical Equipment                | (No information)  |
| Priority                                | Noncommunicable diseases, obesity, upgrade of health system to response disaster and health emergency, as well as changing disease burden.  |
| Communicable Disease Emergency Response | Necessary action and responses are undertaken along with IHR.   |
| Major Development Partners              | PAHO/WHO, EU, PEPFER, NGO (health service provision, community health), China (hospital construction)   |
| Nutrition                               |   |
| Institutional Arrangement               | Ministry of Health, Wellness and New Health Investment  |
| Major Relevant Policies                 | Food and Nutrition Policy and Action Plan   |
| Human Resource for Health               | (No information)  |

Source: Survey Team with reference to WHO Country Cooperation Strategy for Dominica at a glance, May 2016, Institute for Health Metrics and Evaluation, County Profile, WHO, Global atlas of medical devices, 2017, and WHO, Nutrition Landscape Information System (NLIS)

### 7.3.2 Education

| Overview  |   |   |              |                 |                 |
|---|---|---|--------------|-----------------|-----------------|
| Number of children  | Education level   | Preschool   | primary      | Lower secondary | Upper secondary |
|   | 2019  | 1,464 people  | 6,144 people | 3,124 people    | 1,739 people    |
| Source: Institute for Statistics (UIS), UNESCO Bureau of Statistics |   |   |              |                 |                 |
| Government authority  | Ministry of Education (Ministerio de Educación)   |   |              |                 |                 |
| Education indicator   | Net enrollment rate: primary education 96.3%, lower secondary 98.7%, upper secondary 81.7% (2019)<br>Primary education completion rate 113.9% (2016), out-of-school children rate 3.7% (2019), public education budget GDP ratio 5.6% (2019) Source: UIS  |   |              |                 |                 |
| Impact of COVID-19  |   |   |              |                 |                 |
| School closure / reopening  | According to UNICEF, the number of days completely closed from March 11, 2020 to February 2, 2021 is 85 days, which is less than that of other countries.   |   |              |                 |                 |
| COVID-19 measures   | "Education Sector Measures / Strategy" formulated by the Organization of Eastern Caribbean States (OECS)<br>"OECS Education Sector Response and Recovery Strategy to COVID-19"<br>Measures are implemented based on the strategy created by the Association of East Caribbean States. Providing electronic devices for teachers and students, psychosocial support, providing meals for disadvantaged students, activities to meet the psychosocial needs of teachers, creating videos explaining the current situation for special needs students, Elimination of digital divide.  |   |              |                 |                 |
| Distance education  | Implementation status   | As an alternative to the lessons conducted during the school closure period, lessons are distributed via television and radio.                                    |              |                 |                 |
|   | Access  | Educational purpose in schools' Internet access rate: Primary, lower secondary and upper secondary 100% (UNESCO)  |              |                 |                 |
|   | Teacher training  | N / A   |              |                 |                 |
| School hygiene  | Infection control measures  | The safety guide for reopening the school is prepared by UNICEF.<br>"Framework for reopening schools"   |              |                 |                 |
|   | Facility maintenance  | According to a survey conducted by the World Health Organization (WHO) and UNICEF, almost 100% of schools have basic water, hand-washing facilities, and toilets. |              |                 |                 |
| School lunch / nutrition  | 50% reduction during school closure   |   |              |                 |                 |
| Countermeasures for vulnerable people                               | N / A   |   |              |                 |                 |
| Support for donors, etc.  | UNICEF: US \$ 3 million Grant Aid (Dominica, Grenada, St. Louis, St. Vincent) COVID-19 Education policy and effective countermeasures in the disaster, distance education platform for vulnerable children, digital teaching materials distribution, development of online teaching content for radio and TV education programs, collaboration with the private sector to improve access to primary and secondary education level learning platforms, teacher training for distance learning technology acquisition, schools sanitary infrastructure development in vulnerable areas<br>GPE: Distribution of tablets to vulnerable children for COVID-19 countermeasures (GPE grant US \$ 70,000) |   |              |                 |                 |

Source: Survey Team

### 7.3.3 Agriculture / rural development

|   |  |      |      |
|---|--|------|------|
| Urban / rural population ratio                | 70.5% / 29.5% (FAOSTAT 2018)                                       |      |      |
| Agricultural land area                        | 25,000 ha (FAOSTAT 2019) 1)  |      |      |
| Agricultural sector employment                | 21.0% of total employment (CARICOM 2001) 2)                        |      |      |
| Agricultural GDP                              | 15.3% of total GDP (World Bank 2020) 6)                            |      |      |
| Of the agricultural sector Value added amount | \$ 56,176.65 thousand (including forestry) (World Bank 2020) 3)    |      |      |
| Agricultural sector expenditure ratio         | Ratio of agricultural fiscal expenditure to national budget (%) 4) |      |      |
|   | 2017   | 2018 | 2019 |
|   | 2.58   | 1.44 | 1.67 |

|   |   |         |         |         |         |         |
|---|---|---------|---------|---------|---------|---------|
| Of the agricultural sector<br>Export-import balance | Trade balance (USD1,000, FAOSTAT) 5)  |         |         |         |         |         |
|   |   | 2015    | 2016    | 2017    | 2018    | 2019    |
|   | export  | 5,348   | 6,872   | 8,091   | 4,764   | 4,574   |
|   | Import  | 45,371  | 43,830  | 39,267  | 39,726  | 40,503  |
|   | Balance of payments   | -40,023 | -36,958 | -31,176 | -34,962 | -35,929 |
| Agricultural development Policy / plan / strategy   | <p>The Dominican agricultural sector accounts for 15.2% of the country's GDP (World Bank 2020) 6), which is the highest level in the Caribbean). In the past, the center of the agricultural sector was bananas against the backdrop of incentives for exports to the EU, which accounted for a significant portion of exports. However, with the abolition of preferential treatment, in recent years, diversification into citrus fruits, mangoes, guava, vegetables, coffee, cocoa, coconuts, cut flowers, etc. has been emphasized7).</p> <p>The National Resilience Development Strategy (NRDS) 2030) 8) is a development strategy for 2018-2030, with particular priority on "pursuing sustainable economic growth in the face of climate change." There is. Regarding the agricultural sector, with the strategic goals of agricultural modernization and diversification, "increasing the number of greenhouses", "strengthening irrigation", "increasing the number of farmers adopting hydroponics and other soil-free agricultural techniques" , "Increasing GAP certified farmers", "Accelerating technology transfer from regional organizations and bilateral partners", "50% increase in agricultural sector contribution to GDP", "50 weather-induced agricultural losses" We are aiming to achieve such things as "decrease to less than%".</p> <p>The Caribbean Agricultural Research and Development Institute (CARDI), which Dominica is a member of, is a research and development institute that aims to improve the competitiveness and sustainability of the regional agricultural sector, and was established in 1974 by 12 member countries of CARICOM. Was done. To transform the agricultural sector into a modernized, competitive, innovative and resilient one, CARDI has created a five-year roadmap, Strategic Plan 2018-2022 9). CARDI divides its member countries into three groups based on the economic structure of each country, and Antigua and Barbuda is the third group. This group is an OECS country and R &amp; D is heavily dependent on CARDI. Countries with high food security risks need to increase their food production as much as possible. On the other hand, many farmers are small and have problems due to the large number of steep terrain. The biggest threat to these smallholders is weather problems such as drought and excessive rainfall, which need to be addressed.</p>  |         |         |         |         |         |
| Impact of COVID-19                                  | <p>According to the results of a questionnaire (2020) 10) in the "COVID-19 Food Security and Livelihood Impact Survey" conducted by the Media Institute of the Caribbean, a non-profit organization, for Dominica, COVID-19 It was confirmed that the food situation had deteriorated since April 2020, when the global spread of the infection became clear. In June 2020, about 29% of respondents answered that they had "experienced skipping meals," an increase of 9 points from April of the same year. Similarly, the percentage of those who did not eat a full day increased from 25% in April to 6%. The percentage of respondents who have no food in their households increased from 4% in April 2020 to 18% in June. Producers (farmers) also faced difficulties. Due to measures such as movement restrictions implemented as a measure against COVID-19, markets and restaurants were closed, farmers' opportunities to sell products decreased, and unsold products were forced to be discarded. The United Nations Women's Organization (UN Women) 11) reports that "movement restrictions have drastically reduced the number of female farmers' sales bases." In addition, as a way to avoid the risk of infection, direct sales by individuals and cash transactions were avoided, which made sales more difficult.</p> <p>As a response to food instability, the government has designated agriculture as a priority sector in the 2021/2022 budget, has received a loan from the World Bank, and is implementing an urgent "Agricultural Livelihood and Climate Resilience Project (EALCRP)". As of May 28, 2021, 3,485 farmers and fishermen have benefited from the project, according to a government announcement. Specifically, farmers receive production input packages such as fertilizers, pesticides, seeds, and farm tools, and cash to cover labor costs. Pig farmers receive feed, poultry farmers receive chicks, and fishermen receive engines for fishing boats. did.</p>  |         |         |         |         |         |
| Source / reference                                  | <p>1) FAOSTAT-Land, Input and Sustainability-Land Use-Area-Agriculture (<a href="https://www.fao.org/faostat/en/#data/RL">https://www.fao.org/faostat/en/#data/RL</a>)<br/> 2) <a href="http://statistics.caricom.org/Files/Publications/LABOUR%20FORCE/DOMINICA.pdf">http://statistics.caricom.org/Files/Publications/LABOUR%20FORCE/DOMINICA.pdf</a><br/> 3) <a href="https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart">Agriculture, forestry, and fishing, value added (constant 2015 US \$) --Latin America &amp; Caribbean (https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart)</a><br/> 4) <a href="https://www.fao.org/faostat/en/#data/IG">FAOSTAT-Government Expenditure-Share of Total Expenditure-Central Government (https://www.fao.org/faostat/en/#data/IG)</a><br/> 5) <a href="https://www.fao.org/faostat/en/#data/TCL">FAOSTAT-Trade-Crops and livestock products-Import / Export Value-Agricultural Products (https://www.fao.org/faostat/en/#data/TCL)</a><br/> 6) <a href="https://data.worldbank.org/indicator/NV.AGR.TOTL.ZS?locations=S3-DM&amp;view=chart">Agriculture, forestry, and fishing, value added (% of GDP) --Caribbean small states, Dominica (https://data.worldbank.org/indicator/NV.AGR.TOTL.ZS?locations=S3-DM&amp;view=chart)</a><br/> 7) <a href="https://agricarib.org/country/dominica">Country profile – Dominica (https://agricarib.org/country/dominica)</a><br/> 8) <a href="http://extwprlegs1.fao.org/docs/pdf/dom188481.pdf">National Resilience Development Strategy Dominica 2030 (http://extwprlegs1.fao.org/docs/pdf/dom188481.pdf)</a><br/> 9) <a href="http://www.cardi.org/wp-content/uploads/downloads/2018/05/CARDI-Strategic-Plan-2018-to-2022-Final.pdf">CARDI Strategic Plan 2018-2022 (http://www.cardi.org/wp-content/uploads/downloads/2018/05/CARDI-Strategic-Plan-2018-to-2022-Final.pdf)</a><br/> 10) <a href="https://www.mediainstituteofthecaribbean.com/dominica">DOMINICA, 2021, Media Institute of the Caribbean (https://www.mediainstituteofthecaribbean.com/dominica)</a><br/> 11) <a href="https://www.unwomen.org/en/news/stories/2020/6/feature-women-farmers-find-paths-to-market-amidst-COVID-19">Cultivating change: Women farmers in Dominica find new paths to market amidst COVID-19 shutdowns, 2020, UN WOMEN (https://www.unwomen.org/en/news/stories/2020/6/feature-women-farmers-find-paths-to-market-amidst-COVID-19)</a></p> |         |         |         |         |         |

### 7.3.4 Private sector

Dominican Republic is the smallest economy in the region and little data is available. GDP and minimum wage per capita are medium (both 14th).

|              | Index                      | Value | Ranking                 | Year | Source     |
|--------------|----------------------------|-------|-------------------------|------|------------|
| Productivity | GDP per capita (USD)       | 6,527 | 14 (Among 22 countries) | 2020 | World Bank |
|              | GDP per worker (USD)       | —     | — (Among 18 countries)  | —    | —          |
| Employment   | Minimum wage (USD / month) | 237   | 14 (Among 23 countries) | 2019 | ILO        |
|              | Unemployment rate          | —     | — (Among 22 countries)  | —    | —          |
|              | Female unemployment rate   | —     | — (Among 22 countries)  | —    | —          |
|              | Youth unemployment rate    | —     | — (Among 22 countries)  | —    | —          |
|              | Underemployment rate       | —     | — (Among 18 countries)  | —    | —          |
|              | Informal worker rate       | —     | — (Among 12 countries)  | —    | —          |

Source: Described in the table

|                                    |
|------------------------------------|
| Changes in unemployment rate, etc. |
| No data available                  |

### 7.3.5 Environment / Disaster Management

|                     | item   | data  | remarks                           |
|---------------------|--|---|-----------------------------------|
| Environment         | Environmental agency                                     | Environmental Coordinating Unit, Ministry of Environment, Rural Modernization and Kalinago Upliftment |                                   |
|                     | Waste-related organizations                              | Dominica Solid Waste Management Corporation   |                                   |
|                     | Environmental Budget (USD)                               | 2019: 2,996,567<br>2020: 3,016,185<br>2021: 3,016,185<br>Three-year average:<br>3,009,646             | Average: 12th out of 23 countries |
|                     | Environmental budget per capita (2019-2021 average, USD) | 41.8  | 5th out of 23 countries           |
|                     | Budget ratio to national budget (2019)                   | 0.74%   | 5th out of 23 countries           |
|                     | Donor support status                                     | 3 cases   | As of May 2021                    |
|                     | Renewable energy power generation (GWh) (2019)           | twenty one  | IRENA, 2021                       |
|                     | Geothermal power generation capacity (MWe)               | 2020: 0<br>2025 Forecast: 0   | WGC, 2020                         |
| Disaster Management | Disaster prevention organization                         | Office of Disaster Management (ODM)   |                                   |
|                     | Donor support status                                     | 7 cases   | As of May 2021                    |
|                     | Number of natural disasters (2010-2020)                  | Major disasters: floods, landslides   | (Statistical data not available)  |
|                     | Number of victims (persons) per 100,000 population       | —   | (Statistical data not available)  |

Source: Survey Team

### 7.3.6 Governance and citizen security

| Item                                    | Overview  |
|---|---|
| Political system                        | Parliamentary republic  |
| Election system                         | Free and regular elections are held. The president is nominated by the prime minister and the leader of the opposition and elected by the parliament. The term of office is 5 years. Last election held on October 1, 2018 (next election is scheduled to be held in October 2023). The prime minister is appointed by the president. |
| Legislative system                      | Unicameral  |
| Most recent / next legislative election | Implemented on December 6, 2019. (Next time is scheduled for 2024)  |
| Appointment of judicial system / judge  | The President of the Eastern Caribbean Supreme Court is appointed by the Queen of England. Other judges are appointed by the Judicial Legal Services Committee, an independent organization.  |
| Political stability                     | Gradually improved over the last 10 years   |

|   |  |                             |      |      |
|---|--|-----------------------------|------|------|
| “Worldwide Governance Indicators”                     | Governance indicators are generally better than the regional average, but in recent years "governance effectiveness" has deteriorated.                           |                             |      |      |
|   | Indicator  | Country                     | Year |      |
|   | Voice and Accountability   | * Latin America & Caribbean | 2010 |      |
|   |  |                             | 2019 |      |
|   |  |                             | 2020 |      |
|   | Dominica   | 2010                        |      |      |
|   |  |                             |      | 2019 |
| 2020  |  |                             |      |      |
| Political Stability and Absence of Violence/Terrorism | * Latin America & Caribbean  | 2010                        |      |      |
|   |  | 2019                        |      |      |
|   |  | 2020                        |      |      |
| Dominica  | 2010   |                             |      |      |
|   |  |                             | 2019 |      |
|   |  |                             | 2020 |      |
| Government Effectiveness                              | * Latin America & Caribbean  | 2010                        |      |      |
|   |  | 2019                        |      |      |
|   |  | 2020                        |      |      |
| Dominica  | 2010   |                             |      |      |
|   |  |                             | 2019 |      |
|   |  |                             | 2020 |      |
| Regulatory Quality                                    | * Latin America & Caribbean  | 2010                        |      |      |
|   |  | 2019                        |      |      |
|   |  | 2020                        |      |      |
| Dominica  | 2010   |                             |      |      |
|   |  |                             | 2019 |      |
|   |  |                             | 2020 |      |
| Rule of Law   | * Latin America & Caribbean  | 2010                        |      |      |
|   |  | 2019                        |      |      |
|   |  | 2020                        |      |      |
| Dominica  | 2010   |                             |      |      |
|   |  |                             | 2019 |      |
|   |  |                             | 2020 |      |
| Control of Corruption                                 | * Latin America & Caribbean  | 2010                        |      |      |
|   |  | 2019                        |      |      |
|   |  | 2020                        |      |      |
| Dominica  | 2010   |                             |      |      |
|   |  |                             | 2019 |      |
|   |  |                             | 2020 |      |
| Global freedom status                                 | 93/100 points (citizen rights: 37/40 points, political rights: 56/60 points)<br>Classified as "free country" (Freedom House 2021)                                |                             |      |      |
| Corruption Perception Index (CPI)                     | 48/180th, 55/100 points (Transparency International 2020).   |                             |      |      |
| E-government development index                        | The e-government development index is at the average level in Latin America. A Digital National ID issued.   |                             |      |      |
| Rule of law   | According to WGI, the "rule of law" indicator remains well above the regional average. "Regulatory quality" has deteriorated significantly in the last 10 years. |                             |      |      |
| Citizen security                                      | The homicide rate is higher than the Caribbean countries average, which is an important issue. The homicide rate in 2019 is 19.5 / 100,000.                      |                             |      |      |

### 7.3.7 DX / Innovation

|  |  |                                     |
|--|--|-------------------------------------|
| Basic indicators and statistics  | E-Government Ranking <sup>1)</sup> : 99th                        | Radar chart of e-government ranking |
|  | Mobile connection index <sup>2)</sup> :-                         |                                     |
|  | Network Infrastructure Index:-                                   |                                     |
|  | Internet user rate 69.6  |                                     |
|  | Mobile connection rate 117.9                                     |                                     |
|  | Fixed broadband rate 16.1  |                                     |
|  | Rate of increase in the number of Internet users 0.3 (2021/2020) |                                     |
|  |  |                                     |
| Communication network  |  |                                     |
| <p>Dominica's telecommunications sector is the first in the world to start operating a national telephone system by fully digitizing <sup>3)</sup>, and the Internet utilization rate and broadband penetration rate are always above the Latin American and Caribbean averages due to infrastructure development and introduction of broadband services. , Has achieved steady growth. The contribution of the transportation, storage, and telecommunications sector to Dominican GDP in 2013 was the largest at 12.2% <sup>4)</sup>, surpassing agriculture, forestry and forestry (10.5%) by sector, as a telecommunications sector within the sector. Pure production value is about 40%, 21.2 USD million <sup>4)</sup>, which plays an important role in the development of the national economy.</p> <p>The fixed-line phone penetration rate<sup>5)</sup>, which was 34% in 2002, has fallen to 3.1% (2018) with the growth of the mobile market, which is well below the regional average of 16% (2018), but mobile. The penetration rate <sup>6)</sup> has increased from</p> |  |                                     |

19% (2002) to 107% (2018).

The Dominican telecommunications sector has been liberalized and competition between local and international companies is intensifying. The leading telecommunications provider is Flow (formerly LIME: C & W), which offers a complete telecommunications service package that includes fixed lines, the Internet, mobile and entertainment. FLOW acquired Dominica company Marpin Telecoms in 2017<sup>7)</sup> and continues its business (cable TV, telephone services, broadband internet services). The mobile phone market is competing for market share with AT & T Wireless, Orange and Digicel.

Dominica is also a founding member of the East Caribbean Telecommunications Bureau (ECTEL), which promotes open competition in telecommunications with the aim of providing universal services and fair pricing<sup>8)</sup>.

#### National Strategy for Digital Transformation

The National Resilience Development Strategy (NRDS)<sup>9)</sup> has the following three; <sup>1)</sup> Sustainable Development Goals. <sup>2)</sup> Building a climate change resilience nation <sup>3)</sup> Human-centered development, and the government continues to promote research and development in the field of science and technology. The Ministry of Information Science and Communication Technology, which is the implementing agency of the project and the program, takes the lead in promoting innovation and diversification, and aims to enhance economic power.

Due to the 2017 hurricane Maria, the total damage amounted to 1,311 USD million (56 USD million for telecommunications infrastructure), and we have experienced a natural disaster<sup>10)</sup>. 2020-2030 (CRRP)<sup>11)</sup> was announced. The three pillars of the plan are (1) climate resilience system, (2) disaster risk management system, and (3) effective disaster response and recovery. In particular, the development of the latest resilience ICT networks is recognized as a top priority, with the aim of building fiber optic networks, strengthening digital services, promoting digital e-government services, and improving the overall telecommunications infrastructure.

It also continues to implement the Caribbean DX Project<sup>12)</sup> with a World Bank loan (28 USD million). The project builds foundational items such as digital infrastructure, digital platforms, digital financial services, digital skills, digital entrepreneurship and innovation to enable a dynamic and secure digital economy through a comprehensive ecosystem approach. It is an object.

#### Characteristic efforts

Dominica is currently lacking the items that enable digital government, such as enterprise architecture, interoperability frameworks, identity authentication systems, and government payment portals. The Caribbean DX Project's program also includes the assignment of digital identifiers and the construction of citizen authentication systems, which will provide secure and legally verifiable access to public services. By tokenizing a locally standardized ID number (MPID: multipurpose ID number) as a unique identification number (UIN), back-end integration of various identification registries in the country is possible, and a combination of authentication layer and payment platform. Can be realized.

#### source

1. E-Gov-Index: a composite indicator that consists of three indexes (Online Service Index, Telecommunication Infrastructure Index and Human Capital Index), which are equally weighted. It ranges from 0 to 1, with 1 being the most developed.
2. Mobile Connectivity Index: an input index developed by GSMA to measure the performance against the four key enablers of mobile internet adoption – infrastructure, affordability, consumer readiness and content. (<https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2016/06/Mobile-Connectivity-Launch-Report.pdf>)
3. Find Telecommunication expertise in Dominica [https://www.commonwealthofnations.org/sectors-dominica/business/telecoms\\_and\\_internet\\_service\\_providers/](https://www.commonwealthofnations.org/sectors-dominica/business/telecoms_and_internet_service_providers/)
4. [http://www.sicc.oas.org/ctyindex/OECS/WTO/TPR\\_2014/s299-01\\_s.pdf](http://www.sicc.oas.org/ctyindex/OECS/WTO/TPR_2014/s299-01_s.pdf)
5. Fixed telephone subscriptions (per 100 people) --Latin America & Caribbean, Dominica <https://data.worldbank.org/indicator/IT.MLT.MAIN.P2?locations=ZJ-DM>
6. Mobile cellular subscriptions (per 100 people) --Latin America & Caribbean, Dominica <https://data.worldbank.org/indicator/IT.CEL.SETS.P2?locations=ZJ-DM>
7. Cable & Wireless adquirió Marpin 2K4 y dará televisión en Dominica <https://www.telesemana.com/blog/2017/05/16/cable-wireless-adquirio-marpin-2k4-y-dara-television-en-dominica/>
8. <https://www.ectel.int/about-ectel/>
9. National Resilience Development Strategy 2030 of Dominica <http://observatorioplanificacion.cepal.org/sites/default/files/plan/files/Dominica%202030The%20National%20Resilience%20Development%20Strategy.pdf>
10. study\_1\_caribbean\_final\_draft\_29\_march\_2019 [https://www.wto.org/english/tratop\\_e/devel\\_e/study\\_1\\_caribbean\\_final\\_draft\\_29\\_march\\_2019.pdf](https://www.wto.org/english/tratop_e/devel_e/study_1_caribbean_final_draft_29_march_2019.pdf)
11. Climate Resilience and Recovery Plan 2020-2030: <https://reliefweb.int/sites/reliefweb.int/files/resources/CRRP-Final-042020.pdf>
12. Caribbean Digital Transformation Project <https://documents1.worldbank.org/curated/en/848701593136915061/pdf/Dominica-Grenada-St-Lucia-St-Vincent-and-the-Grenadines-and-the-Organization-of-Eastern-Caribbean-States-Caribbean-Digital-Transformation-Project-Digital-Caribbean.pdf>

## 7.3.8 Infrastructure and Energy

| Transport                                 |  |
|---|--|
| Overview                                  | Inland transportation is mainly by car.<br>The main public transportation is buses and taxis.  |
| Leadership governance                     | Ministry of Tourism, International Transport and Maritime Initiatives<br>Dominica Air and Sea Ports Authority (DASPA)                      |
| Major development partners                | GIZ  |
| Energy and electricity                    |  |
| Overview                                  | 94% of primary energy is imported as fossil fuel. 63% of electricity is produced by fossil fuels.  |
| Carbon neutral national plan              | Dominican Climate Resilience and Recovery Plan 2020-2030<br>Goal: Carbon Neutral through 100% Domestic Renewable Energy Production by 2030 |
| Leadership governance and utility company | Ministry of Trade, Commerce, Entrepreneurship, Innovation, Business and Export Development   |



|                            |  |
|----------------------------|--|
|                            | Dominica Electricity Services Limited (DESL) |
| Major development partners | UNDP   |

Source: JICA Study Team with reference to various websites of the government organization and international organization (WB / IEA / IRENA / US DOE).

### 7.3.9 Tourism

The tourism sector of Dominica is the smallest of the countries surveyed in the Caribbean, but the country is highly dependent on tourism.

|  |  |   |
|--|--|---|
| Number of international tourist arrivals (2018)              |  | 63,000  |
| International Tourism Receipts (2019)                        |  | USD 105 million   |
| Tourism Competitiveness Ranking (2019)                       |  | N / A   |
| Tourism Dependency Index (2019)                              |  | 42.0 (9 <sup>th</sup> out of 166 countries)   |
| Government of Japan policy                                   | Number of JICA projects in the last 10 years   | none  |
|  | References to the Country Assistance Policy  | none  |
|  | Interest in pilot projects   | N / A   |
| Tourism industry vulnerability                               | Contribution of Travel & Tourism to GDP (2019)   | 36.9% (6 <sup>th</sup> out of 23 countries)   |
|  | Contribution of Travel & Tourism to employment (2019)  | 38.7% (8 <sup>th</sup> out of 23 countries)   |
|  | Ratio of international spending (2019)   | 91% (6 <sup>th</sup> out of 23 countries)   |
|  | Top 3 countries of origin of visitors (2019)   | USA (33.92%)<br>Canada (13.84%)<br>France (3.28%)   |
| Importance of tourism  | Ratio of the budget amount of tourism-related ministries to the national budget amount (2019)            | 2.7% (5 <sup>th</sup> out of 16 countries)<br>National budget: XCD 1,093,049,259<br>Budget of tourism-related ministries: XCD 29,066,340  |
|  | Whether or not it is mentioned as a priority sector in the National Economic and Social Development Plan | Yes<br>Plan name: National Resilience Development Strategy 2030 of Dominica<br>Reference example: As one of the Objectives of Dominica's Resilient Development Results Monitoring Matrix 9. Operate / manage a sustainable vibrant well diversified tourism sector (p. 132) |
|  | Existence of effective national tourism policies / strategies / plans                                    | Yes (Tourism Master Plan 2012-2022)   |
| Impact of COVID-19   | Changes in the contribution of Travel & Tourism to GDP (2019 → 2020)                                     | -64.6% (9 <sup>th</sup> out of 23 countries)  |
|  | Changes in the contribution of Travel & Tourism to employment (2019 → 2020)                              | -29.4% (7 <sup>th</sup> out of 23 countries)  |
| Number of government support measures for the tourism sector |  | N / A   |

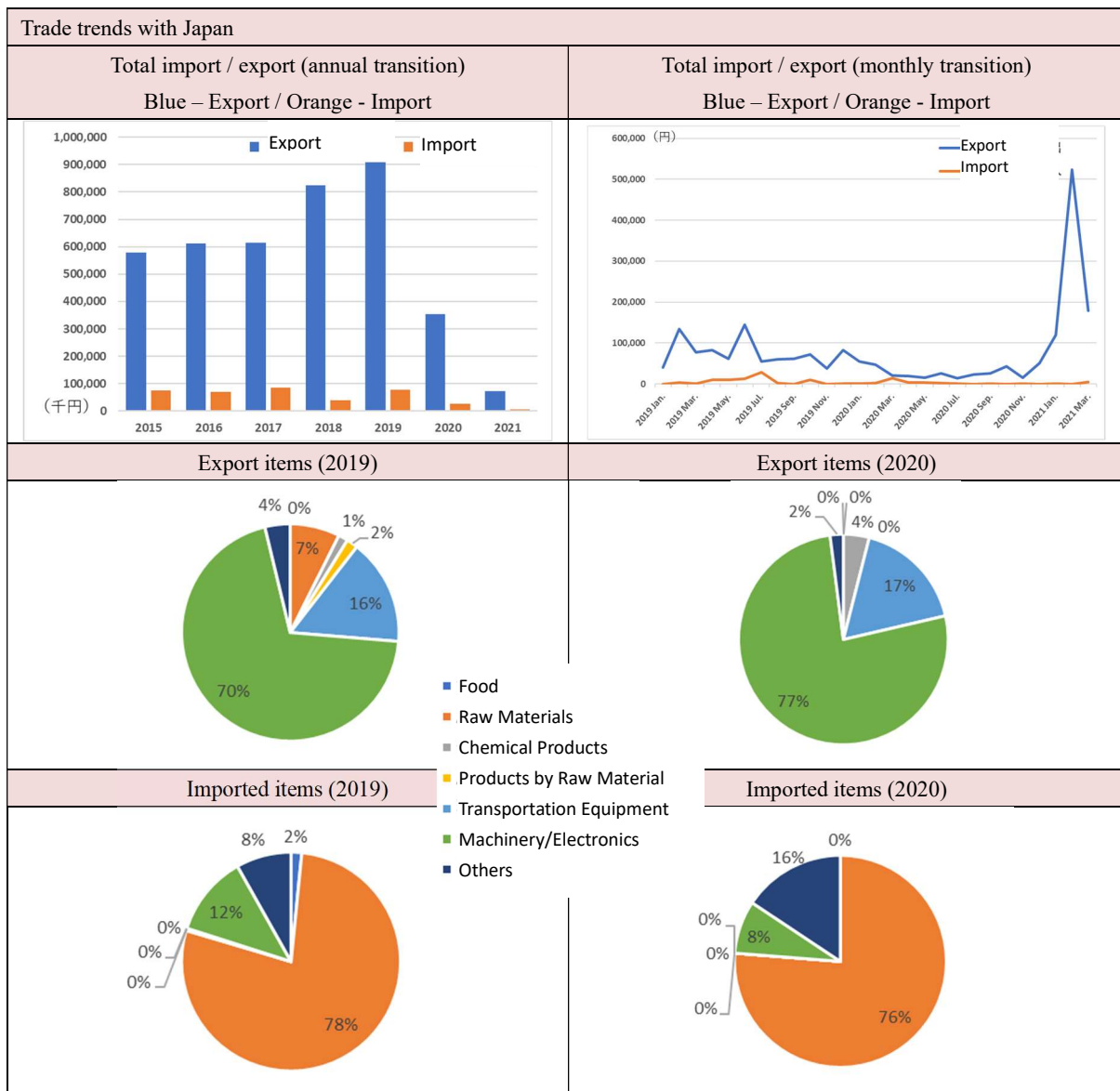
Source: Survey Team

### 7.3.10 Public-private partnership

|  | item   | Contents    |
|--|--|-------------|
| No. of JICA Public-Private Partnership Projects (After 2012) | Cooperation preparatory survey (overseas investment and financing) (former PPP infrastructure project)           | 0 cases     |
|  | Overseas investment and loan   | 0 cases     |
|  | SME Partnership Promotion Survey (support for Small-sized Enterprise)  | 0 cases     |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for small- and medium- sized enterprise) | 0 cases     |
|  | SDGs Business Verification Survey with Private Sector (support for small- and medium- sized enterprise)          | 0 cases     |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for large enterprise)                    | 0 cases     |
|  | SDGs Business Verification Survey with Private Sector (support for large enterprise)                             | 0 cases     |
| Total number of Japanese private companies entering the      | Total number of business locations   | 0 companies |
|  | Overseas branches of Japanese companies,   | 0           |



|                         |  |                         |
|-------------------------|--|-------------------------|
| market<br>(2019 survey) | Local corporations wholly owned by Japanese companies and their branches                                       | 0 companies             |
|                         | Branch offices wholly owned by Japanese companies and their branches   | 0 companies             |
|                         | joint ventures (local corporations in which Japanese companies have a direct or indirect stake of 10% or more) | 0 companies             |
|                         | joint ventures (Branch offices in which Japanese companies have a direct or indirect stake of 10% or more)     | 0 companies             |
|                         | companies established overseas by Japanese nationals (in which Japanese nationals have a stake of 10% or more) | 0 companies             |
|                         | Unknown classification   | 0 companies             |
|                         | Number of Japanese residents (2020 survey)   | Total                   |
| Long-term residents     |  | 0 people                |
| Permanent resident      |  | 0 people                |
| Business Environment    | Doing Business 2020 Rank   | 111 <sup>th</sup> place |
| PPP Project             | Existence of PPP law scheme  | ×                       |
|                         | PPP project with Japanese companies  | 0 cases                 |



### Gathering information about the PPP system

| Nº  | Task Item   | Inquiries/comments/status<br>Title of submitted file           | Source/URL  |
|-----|---|--|---|
| 1   | <b>PRIORITY 4_PPP Sector</b>  |  |   |
| 1.1 | PPP Projects in selective countries<br>PPP rules and regulations in Central America and Caribbean Countries |  | All below can be useful   |
| A   | PPP laws and Regulations<br>if there is any, when, and how  | There is no PPP Law  | <a href="https://pppknowledgelab.org/countries/dominica">https://pppknowledgelab.org/countries/dominica</a>                   |
| B   | PPP Unit Organization<br>if there is any, how structured  | There is no PPP Unit Organization                              | <a href="https://pppknowledgelab.org/countries/dominica">https://pppknowledgelab.org/countries/dominica</a>                   |
| C   | PPP sectors<br>in what sectors are the PPPs allowed   | There is only information about the Energy Sector              | <a href="https://ppi.worldbank.org/en/snapshots/country/dominica">https://ppi.worldbank.org/en/snapshots/country/dominica</a> |
| D   | Proposal Types (Solicited or Unsolicited)<br>unsolicited  | There is only information about 1 project and it was Solicited | <a href="https://ppi.worldbank.org/en/snapshots/country/dominica">https://ppi.worldbank.org/en/snapshots/country/dominica</a> |
| E   | PPP Forms<br>BOT,BTO,DB,,,what form are allowed   | The PPP Form of the Project is Full                            | <a href="https://ppi.worldbank.org/en/snapshots/country/dominica">https://ppi.worldbank.org/en/snapshots/country/dominica</a> |
| F   | PPP types<br>Availability payment, service purchase   | -  |   |
| G   | PPP Project Trends<br>how much PPP projects in the last 10 years  | -  |   |
| H   | Participation of Japanese firms in PPP Projects<br>if any (check news source)                               | -  |   |
| I   | Any notable points for each country<br>if any   | The only project found was from 1997                           | <a href="https://ppi.worldbank.org/en/snapshots/country/dominica">https://ppi.worldbank.org/en/snapshots/country/dominica</a> |

Source: Survey Team

## 8. Dominican Republic

### 8.1 Country overview

#### 8.1.1 Basic information

The Dominican Republic (Spanish: República Dominicana) is a republican nation located in the eastern part of Hispaniola in the Greater Antilles of the West Indies. The capital is Santo Domingo. Hispaniola is the second largest island in the Greater Antilles and borders Haiti in the western part of the island. Puerto Rico is to the east across the Mona Passage, Cuba is to the west across the Windward Passage, and Jamaica is across the Jamaica Strait. The country was originally the first permanent settlement of Europeans in the Americas and later became the base for the Spanish invasion. Therefore, Santo Domingo is the earliest colonial city in the Americas, built in 1496, and has a history of building the first universities, cathedrals, and fortresses in the Americas accordingly. The Dominican Republic had approved the Republic of China (Taiwan), but the Republic of China announced a severance after establishing diplomatic relations with the People's Republic of China on May 1, 2018. Agriculture is the main industry, and exports of agricultural products and tourism are the sources of foreign currency. The rural population accounts for 70% of the total population, with about 12% of landowners owning 77% of cultivated land. The export value of sugar, which is the main agricultural product, accounts for half of the total. Furfural, made from sugar pomace, has a relatively high market share in North America. The Dominican Republic is relatively blessed with mineral resources, with the main minerals being gold, silver, copper and nickel. In particular, the amount of nickel produced is large, which is an important financial resource for the country. In recent years, the development of a new gold mine is expected. In recent years, the service industry has been growing rapidly to replace agriculture due to the rise of the tourism industry.

#### 8.1.2 General circumstances

|             |   |                 |  |
|-------------|---|-----------------|--|
| 1 area      | 48,442 square kilometers (Kyushu and Kochi prefecture combined) | 2 Population    | Approximately 10.73 million people (2019 World Bank) |
| 3 Capital   | Santo Domingo   | 4 ethnic groups | Mixed race 73%, European 16%, African 11%            |
| 5 languages | Spanish   | 6 religion      | Catholic   |

Source: Ministry of Foreign Affairs HP Dominican Republic Basic Data

#### 8.1.3 Economic overview

|                          |   |                              |  |
|--------------------------|---|------------------------------|--|
| 1 Major industry         | Tourism, agriculture, mining, textile processing, medical supplies manufacturing, service industry (call center, etc.)  | 2 GDP<br>3 GNI / person      | \$ 88,941 Million (World Bank 2019)<br>US \$ 18,270 (2019) |
| 4 Economic growth rate   | -6.7% (2020: Central Bank)  | 5 Unemployment rate          | 5.85% (2019: World Bank)                                   |
| 6 Price increase rate    | 5.55% (2020: Central Bank)  |                              |  |
| 7 Total trade amount     | Exports (FOB): \$ 9,853 million (2020: Dominican Customs Administration)<br>Imports (FOB): \$ 17,278 million (2020: Dominican Customs Administration)   |                              |  |
| 8 Major trade items      | Export: Minerals (ferronickel, gold, silver), optical equipment / precision equipment, electrical equipment (current breaker) / parts, medical equipment (blood transfusion equipment, etc.), cacao, cotton T-shirts<br>Imports: Petroleum / petroleum-related products, natural gas, machinery / electrical equipment, automobiles, pharmaceuticals, steel, grains |                              |  |
| 9 Major trading partners | Exports: USA, Switzerland, Haiti, Puerto Rico, Canada (2020, including free zone)<br>Imports: USA, China, Mexico, Spain, Brazil (2020, including free zone)   |                              |  |
| 10 currencies            | Dominican peso (DOP)  | 11 Foreign currency reserves | \$ 6,689 million (July 2020.7: Central Bank)               |
| 12 National budget       | na  | 13 External debt balance     | \$ 30,702.5 million (2020: Central Bank)                   |
| 14 Economic              | (1) Traditionally, it was an exporter of traditional primary products such as sugar, coffee, cacao, and   |                              |  |

|          |   |
|----------|---|
| overview | <p>tobacco, but since 1990, exports of light industrial products such as textiles from free trade areas (free zones) have increased. In addition, the tourism industry has developed due to the attraction of foreign investment and the progress of infrastructure development. There will be about 8 million foreign tourists in 2019. Tourism revenue is about 7.7 billion dollars. In addition to the above, the main source of foreign currency is remittances from Dominican Republicans (about 2 million people) residing overseas (about \$ 8.2 billion 2020: Central Bank).</p> <p>(2) During the first term of the Fernandez administration (1996-1999), high economic growth of 7% was recorded on average. With the economic stagnation under the Meheer administration, the second phase of the Fernandez administration (2004-2008) was based on the IMF Standby Agreement, with tax reform, fiscal policy (subsidy reduction, tax collection system reform, etc.), As a result of efforts for monetary policy (price stability, etc.), strengthening of the financial sector, and reform of the electric power sector, it achieved high growth with substantial results in stabilizing exchange rates and controlling inflation. During the third term of the Fernandez administration (2008-2012), the global financial crisis of September 2008 reduced exports from free zones, remittances and tourism revenues, and the growth rate in 2009 was up to 0.9%. I was depressed. However, despite fluctuations, the economy has recovered.</p> <p>(3) The real economic growth rate during the first term of the Medina administration (2012-2016) was 6.4% on average, driven mainly by the construction industry and tourism industry. In the construction industry, low-priced housing, hotels, and villas were built as private investments, and schools and classrooms were built, roads were improved, and subway line 2 was extended as public investments, which boosted this growth. In the second term of the administration (2016-2020), the real economic growth rate in 2017 was only 4.6% due to the decrease in public and private investment, the slowdown in the growth of the construction industry, and the damage caused by hurricanes. It is expected to be around 7.0% (central bank) in 2018. While achieving steady economic growth, public debt has reached about 50% of GDP, and fiscal reform is an issue.</p> |
|----------|---|

Source: Ministry of Foreign Affairs HP Dominican Republic Basic Data

## 8.1.4 Country-specific development cooperation policy

### (1) Government of Japan Development Cooperation Policy by Country

**Table 8-1 Overview of Japan's ODA to the Dominican Republic**

|                                      |  |
|--------------------------------------|--|
| 1. 1. Overview                       | Japan's economic cooperation with the Dominican Republic began with the implementation of technical cooperation in 1964. Since then, it has provided support through loan aid, food production increase assistance, and grant-in-aid for aid, and Japan became a major donor to the country in the 1990s and 2000s. Currently, we are providing cooperation centered on technical cooperation.   |
| 2. 2. Aim of development cooperation | The Dominican Republic occupies an important position for the stability and development of the Central American and Caribbean regions, with democracy taking root and officially joining the Central American Integration System (SICA) in 2013. Although the country has a relatively high per capita national income and is classified as a middle-income country, it still has many poor people in rural areas. In addition, most of the domestic companies are small and medium-sized enterprises, but they lack human resources with technology and know-how, and the development of human resources who will lead the domestic industry is an issue while being exposed to international competition. Furthermore, with the increase in tourists and rapid urbanization, environmental problems such as waste problems are becoming more serious. Supporting the country's efforts to address these issues will not only deepen bilateral relations, but will also contribute to the stable development of Central America and the Caribbean as a whole.   |
| 3. 3. Basic policy                   | Our basic policy is to support the realization of sustainable and balanced development. In the Dominican Republic's "National Development Strategy 2010-2030" (established in November 2009), Japan places particular priority on sustainable economic development and inequality reduction, and utilizes the results of bilateral cooperation so far. At the same time, it will contribute to solving the development issues of the country.  |
| 4. Priority areas                    | <p>(E) Support for sustainable economic development: In order to strengthen the competitiveness of domestic industries, we will focus on improving the productivity of SMEs and support efforts such as human resource development. In the tourism field, we will support the promotion of the tourism industry by utilizing local resources and revitalize the local economy. Furthermore, in order to improve the deteriorated environment (waste treatment, water pollution, etc.), the central government's policy-making and supervision functions will be strengthened, and local governments will themselves.</p> <p>Support efforts to strengthen the waste management system of the healing body. In the energy field, it depends heavily on imported fossil fuels and contributes to the trade deficit, so we will consider supporting the introduction and promotion of renewable energy and the promotion of energy conservation.</p> <p>(2) Support for rectifying disparities: There are still many poor people, especially in rural areas, and there are areas where social infrastructure such as medical care and education is not sufficiently developed, so rural development, education, medical care, and health. Support efforts in such fields.</p> |

Source: Ministry of Foreign Affairs HP Dominican Republic Country Data Collection 2017

**Table 8-2 National Development Cooperation Policy for the Dominican Republic (September 2018)**

| <b>3. 3. Priority field (medium goal)</b> |   |
|---|---|
| (1) Sustainable economic development      | In order to strengthen the competitiveness of domestic industries, we will focus on improving the productivity of SMEs and support human resource development efforts. In the tourism field, we will utilize local resources and support the promotion of the tourism industry, including the area around the resort.   |
|   | As the deterioration of the environment (waste treatment, water pollution, etc.) is becoming more serious, we will support the strengthening of the central government's policy-making and supervision functions in these fields. In the energy field, support for the introduction and promotion of renewable energy and the promotion of energy conservation. Furthermore, in the field of disaster prevention, we will support the reduction of disaster risk and the response in the event of a disaster. |
| (2) Correcting disparities                | We will support efforts in fields such as rural development, education, medical care, health, and livelihood improvement, and support the strengthening of the capacity of government agencies to improve the financial base necessary for implementing social development policies.  |

Source: Survey Team

## **(2) Survey on COVID-19 by development partners**

We extracted sector names and specific quantitative figures that have a large impact on the country-specific analysis described in various reports of development partners. Reports from the World Bank, OECD, BCIE, SICA, and the Ministry of Economy, Trade and Industry of Japan suggest the importance of introducing digitalization and innovation (Fintech, Aggrotech, Autotech, etc.), and incorporate the survey results of these development partners. I arranged it accordingly.

World Bank: "Growth and Revitalization" 2021 Semi-Annual Economic Report (March 2021)

- ✓ OECD: COVID-19 in LAC, Regional socio-economic implications and policy priorities (December 2020)
- ✓ BCIE: Impacto Económico del COVID-19 (April 2020)
- ✓ SICA: Estimación del Impacto Económico del COVID-19 en Centroamérica y República Dominicana (April 2020)
- ✓ Ministry of Economy, Trade and Industry of Japan: "Economic and Industrial Policy Based on the Impact of the New Corona Virus" (June 2020), Accelerating Digitization and Onlineization, Gig Economy, Innovation in the Transition to a New Everyday Life 1) Medical care / health, 2) Digital: Infrastructure development premised on the arrival of a digital society, 3) Green: Response to climate change problems, Energy security, 4) Emphasizes resilience.

### **8.1.5 Policies for COVID-19 measures taken by governments of each country**

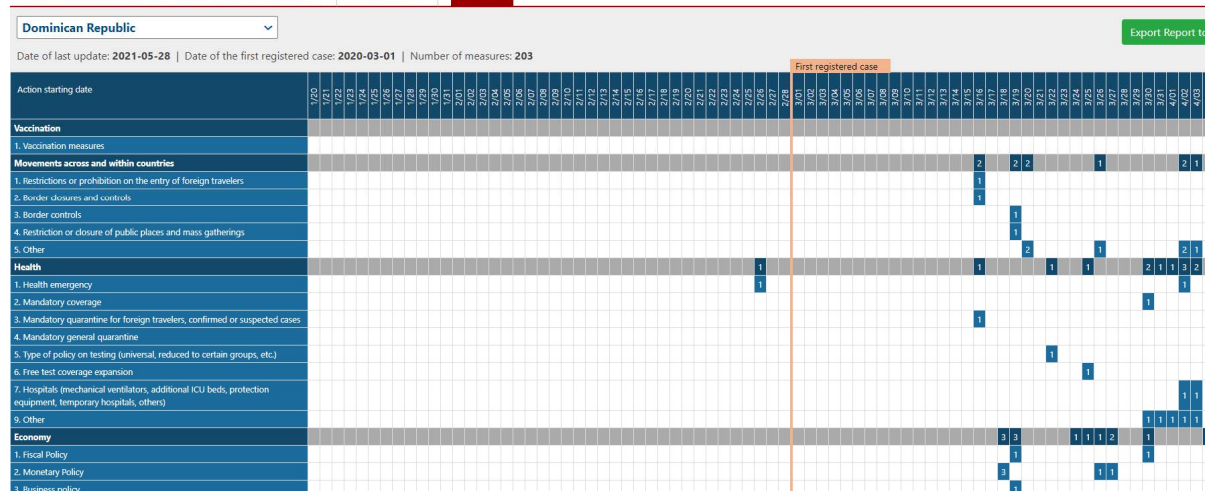
Various policies for COVID-19 taken by the government are described on the ECLAC homepage "COVID-19 Observatory" by country, time series, and field, and can be analyzed.



Follow-up of the evolution of COVID-19 Measures

Measures details

Timeline



Source: <https://cepalstat-prod.cepal.org/forms/covid-countrysheet/index.html?table=2&country=DOM>

In this survey, the 136 policies in the Dominican Republic posted on this website were classified by sector as much as possible.

**1) Infection spread and alleviation of aggravation and death**

No material was available.

**2) Support for affected industries and people**

**Table 8-3 Support for affected industries and people (Dominican Republic)**

| Various government policies (COVID-19 Observatory for LAC) |     |
|--|-----|
| Socioeconomic policy                                       | 44  |
| Health care & nutrition                                    | 43  |
| Education  | 6   |
| Agriculture & rural development                            | 0   |
| Private sector   | 23  |
| Environment & disaster prevention                          | 0   |
| Governance and social security                             | 3   |
| DX and innovation  | 1   |
| Infrastructure & energy                                    | 0   |
| Tourism  | 0   |
| PPP  | 0   |
| Others (b)   | 16  |
| total  | 136 |

Source: Survey Team

**3) Arrangement of various policies for COVID-19 taken by the government**

COVID-19 Observatory for Latin America and Caribbean (ECLAC) organized by governments.

**Table 8-4 Government-directed COVID-19 Policy Categories (Dominican Republic)**

**Follow-up of the evolution of COVID-19 Measures**

| <b>Vaccination</b>  | <b>Economy</b>   | <b>Social protection</b>  |
|---|--|---|
| 1. Vaccination measures   | 1. Fiscal Policy   | 1. Cash transfers (new transfers, increase in existing transfers, expansion of cash transfers to new recipients, early disbursement of transfers) |
| <b>Movements across and within countries</b>  | 2. Monetary Policy   | 2. Food transfers / In-kind transfers   |
| 1. Restrictions or prohibition on the entry of foreign travelers  | 3. Business policy   | 3. Guarantee of basic services  |
| 2. Border closures and controls   | 4. Restriction of economic activity (including shops and shopping centers)                             | <b>Education / schools</b>  |
| 3. Border controls  | 5. Price and quantity controls   | 1. Suspension of classes  |
| 4. Restriction or closure of public places and mass gatherings  | 6. Economic Stimulus (includes aggregate value of fiscal measures and separately of credit guarantees) | 2. Provision of tools for distance learning (online platforms, TV, radio, distance-learning materials)  |
| 5. Other  | 7. Regulation of the personal hygiene and cleaning products market                                     | 3. Maintenance of school feeding programme (indicating under which modalities)  |
| <b>Health</b>   | 8. Debt relief and suspension of credit payments (individuals, microentrepreneurs)                     | <b>Gender</b>   |
| 1. Health emergency   | 9. Other   | 1. Gender-based violence against women  |
| 2. Mandatory coverage   | <b>Labor</b>   | 2. Care economy   |
| 3. Mandatory quarantine for foreign travelers, confirmed or suspected cases                                   | 1. Labor Protection  | 3. Employment and income generation   |
| 4. Mandatory general quarantine   | 2. Elective work leave   | 4. Benefits, transfers and other social protection measures   |
| 5. Type of policy on testing (universal, reduced to certain groups, etc.)                                     | 3. Reduction of working hours  | 5. Women's participation in the digital era   |
| 6. Free test coverage expansion   | 4. Prohibition of dismissal from work  | 6. Other  |
| 7. Hospitals (mechanical ventilators, additional ICU beds, protection equipment, temporary hospitals, others) | 5. Other   |   |

Source: Survey Team



## 8.2 Macroeconomic analysis and selection of priority countries

### 8.2.1 Macroeconomic analysis

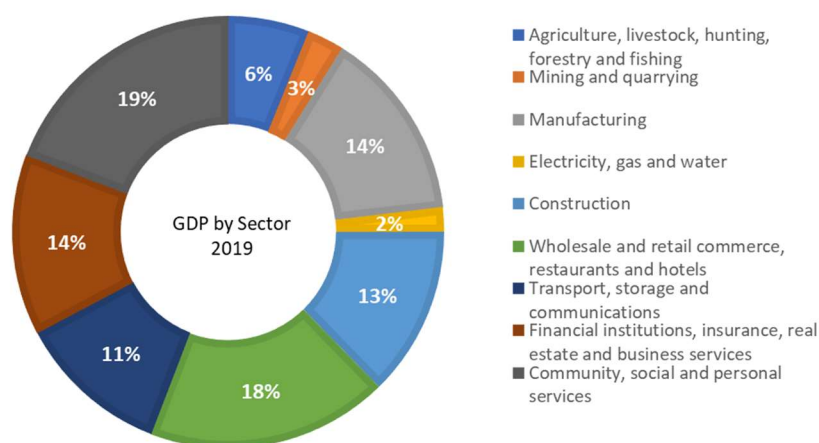
#### (1) Industrial composition

**Table 8-5 Industrial composition of the Dominican Republic**

Table: Gross domestic product, by sector (precios constantes en dólares)

|  | 2011     | 2012     | 2013     | 2014     | 2015     | 2016     | 2017     | 2018     | 2019a/   | 2020 b/ |
|--|----------|----------|----------|----------|----------|----------|----------|----------|----------|---------|
| Agriculture, livestock, hunting, forestry and fishing                | 3,501    | 3,598    | 3,701    | 3,790    | 3,879    | 4,098    | 4,337    | 4,575    | 4,762    |         |
| Mining and quarrying   | 480      | 538      | 1,521    | 1,908    | 1,734    | 2,181    | 2,116    | 2,089    | 2,160    |         |
| Manufacturing  | 8,513    | 8,575    | 8,835    | 9,301    | 9,708    | 10,017   | 10,285   | 10,923   | 11,201   |         |
| Electricity, gas and water   | 1,050    | 1,127    | 1,151    | 1,214    | 1,208    | 1,191    | 1,234    | 1,305    | 1,402    |         |
| Construction   | 5,290    | 5,009    | 5,268    | 5,885    | 6,939    | 7,666    | 8,046    | 8,996    | 9,933    |         |
| Wholesale and retail commerce, restaurants and hotels                | 9,677    | 9,957    | 10,045   | 10,797   | 11,633   | 12,431   | 12,974   | 13,877   | 14,186   |         |
| Transport, storage and communications                                | 5,822    | 6,095    | 6,398    | 6,842    | 7,243    | 7,704    | 8,065    | 8,604    | 8,947    |         |
| Financial institutions, insurance, real estate and business services | 7,031    | 7,357    | 7,658    | 8,053    | 8,458    | 9,055    | 9,438    | 9,935    | 10,572   |         |
| Community, social and personal services                              | 10,472   | 10,921   | 11,340   | 12,065   | 12,734   | 13,405   | 13,726   | 14,328   | 15,000   |         |
| Total  | 51,835.2 | 53,175.7 | 55,915.8 | 59,855.3 | 63,536.1 | 67,747.9 | 70,221.1 | 74,631.2 | 78,164.1 | 0       |

Source: ECLAC



Source: Survey Team

## (2) Trends in major economic indicators

**Table 8-6 Trends in Major Economic Indicator (Dominican Republic)**

Table 1 DOMINICAN REPUBLIC: MAIN ECONOMIC INDICATORS (Annual growth rates)

|  | 2011     | 2012     | 2013     | 2014     | 2015     | 2016     | 2017     | 2018     | 2019a/   | 2020 b/  |
|--|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|
| Gross domestic product (Annual growth rates c/)                                      | 3.1      | 2.7      | 4.9      | 7.1      | 6.9      | 6.7      | 4.7      | 7.0      | 5.1      | -5.5     |
| Per capita gross domestic product (Annual growth rates c/)                           | 1.9      | 1.5      | 3.7      | 5.8      | 5.7      | 5.5      | 3.5      | 5.9      | 4.0      | -6.6     |
| Gross domestic product, by sector (Annual growth rates c/)                           |          |          |          |          |          |          |          |          |          |          |
| Agriculture, livestock, hunting, forestry and fishing                                | 7.3      | 2.8      | 2.9      | 2.4      | 2.3      | 5.6      | 5.8      | 5.5      | 4.1      | 2.8      |
| Mining and quarrying   | 99.9     | 12.0     | 182.7    | 25.4     | -9.1     | 25.7     | -2.9     | -1.3     | 3.4      | -12.5    |
| Manufacturing  | 3.5      | 0.7      | 3.0      | 5.3      | 4.4      | 3.2      | 2.7      | 6.2      | 2.5      | -2.2     |
| Electricity, gas and water   | 2.6      | 2.1      | -1.0     | 6.3      | 8.8      | 7.3      | 2.6      | 7.9      | 3.8      | 0.4      |
| Construction   | -2.4     | -5.3     | 5.2      | 11.7     | 17.9     | 10.5     | 5.0      | 11.8     | 10.4     | -10.7    |
| Wholesale and retail commerce, restaurants and hotels                                | 3.4      | 2.9      | 0.9      | 7.5      | 7.7      | 6.9      | 4.4      | 7.0      | 2.2      | -4.8     |
| Transport, storage and communications  | 3.9      | 4.7      | 5.0      | 6.9      | 5.9      | 6.4      | 4.7      | 6.7      | 4.0      | -7.6     |
| Financial institutions, insurance, real estate and business services                 | 2.9      | 4.6      | 4.1      | 5.2      | 5.0      | 7.1      | 4.2      | 5.3      | 6.4      | 7.1      |
| Community, social and personal services  | 3.3      | 4.3      | 3.8      | 6.4      | 5.5      | 5.3      | 2.4      | 4.4      | 4.7      |          |
| Balance of Payments (Millions of dollars)  |          |          |          |          |          |          |          |          |          |          |
| Current account balance  | -4,334.6 | -3,880.9 | -2,567.9 | -2,170.2 | -1,280.3 | -814.7   | -133.1   | -1,159.6 | -1,204.9 | -1,436.0 |
| Goods balance  | -8,939.7 | -8,716.3 | -7,376.8 | -7,374.2 | -7,464.7 | -7,559.0 | -7,599.7 | -9,301.3 | -9,069.4 | -6,749.2 |
| Exports, f.o.b.  | 8,361.9  | 8,935.5  | 9,424.4  | 9,898.9  | 9,441.8  | 9,839.6  | 10,134.6 | 10,907.6 | 11,218.6 | 10,253.0 |
| Imports, f.o.b.  | 17,301.6 | 17,651.8 | 16,801.2 | 17,273.1 | 16,906.5 | 17,398.6 | 17,734.3 | 20,208.9 | 20,288.0 | 16,636.0 |
| Services trade balance   | 3,005.4  | 3,320.5  | 3,633.6  | 4,083.9  | 4,367.8  | 4,939.6  | 5,549.8  | 5,885.6  | 5,452.4  | 1,005.0  |
| Income balance   | -2,254.5 | -2,399.6 | -2,972.3 | -3,247.4 | -2,936.4 | -3,253.1 | -3,793.8 | -3,845.0 | -4,274.1 | -3,856.9 |
| Net current transfers  | 3,854.2  | 3,914.5  | 4,147.6  | 4,367.5  | 4,753.0  | 5,057.8  | 5,710.6  | 6,101.1  | 6,686.2  | 6,887.0  |
| Capital and financial balance (Millions of dollars)                                  |          |          |          |          |          |          |          |          |          |          |
| Net foreign direct investment d/   | 2,276.7  | 3,142.4  | 1,990.5  | 2,208.5  | 2,204.9  | 2,406.7  | 3,570.7  | 2,535.3  | 3,012.8  | 2,554.3  |
| Other capital movements d/   | 2,354.1  | 298.9    | 1,911.3  | 611.8    | -154.4   | -700.1   | -2,709.9 | -541.1   | -668.9   |          |
| Foreign remittance from abroad for 2019 and 2020                                     | 2,419.5  | 933.4    | 734.9    | -881.8   | -1,249.2 | -1,658.7 | -2,930.0 | -1,836.9 | -1,919.7 |          |
| Remittances from emigrant workers  | 4,008.0  | 4,045.0  | 4,262.0  | 4,571.0  | 4,961.0  | 5,261.0  | 5,912.0  | 6,494.0  | 7,087.0  | 5,850.0  |
| Microfinance dispatched and the sectors that received microfinance for 2019 and 2020 |          |          |          |          |          |          |          |          |          |          |

Source: Economic Survey of Latin America and the Caribbean 2020: Main conditioning factors of fiscal and monetary policies in the post-COVID-19 era

### 8.2.2 Impact analysis and identification of key sectors

#### (1) Impact assessment results for each sector by AHP analytic hierarchy process based on economic indicators

**Table 8-7 Results of Sector Impact Analysis by COVID-19 (Dominican Republic)**

| ECLAC category   | Changes around COVID-19 | Trends before COVID-19 | Total GDP ratio of the sector | comprehensive evaluation |   |
|--|-------------------------|------------------------|-------------------------------|--------------------------|---|
| Importance (weight)  | 0.4590                  | 0.0660                 | 0.0750                        |                          |   |
| Agriculture, livestock, hunting, forestry and fishing                | 2                       | 2                      | 3                             | 0.028                    | 9 |
| Mining and quarrying   | 8                       | 9                      | 2                             | 0.098                    | 2 |
| Manufacturing  | 5                       | 1                      | 7                             | 0.064                    | 5 |
| Electricity, gas and water   | 3                       | 4                      | 1                             | 0.038                    | 7 |
| Construction   | 9                       | 8                      | 5                             | 0.112                    | 1 |
| Wholesale and retail commerce, restaurants and hotels                | 6                       | 5                      | 8                             | 0.082                    | 4 |
| Transport, storage and communications                                | 7                       | 7                      | 4                             | 0.088                    | 3 |
| Financial institutions, insurance, real estate and business services | 1                       | 6                      | 6                             | 0.029                    | 8 |
| Community, social and personal services                              | 4                       | 3                      | 9                             | 0.060                    | 6 |

Source: Survey Team

#### 1) ECLAC Sector Classification Amendments to the Sector Classification

In line with the method described in the main volume, the Sector Classification is divided into the Vertical Sector and the Cross-Cutting Sector, the ECLAC classification sector is allocated to the Vertical Sector Classification, and the evaluation of various policies related to COVID-19 taken by the government along with the results of the partner survey and the indicators of the national development

cooperation policy, the ranking of priority sectors are calculated using the four indicators, which are described in the table below.

**Table 8-8 Ranking of Priority Sectors (Dominican Republic)**

|                                   | Economic Indicator Analysis | Government Policy on COVID-19 | Survey on COVID-19 by Development Partners | Country Development Cooperation Policy | Base Case |   | Priority |
|-----------------------------------|-----------------------------|-------------------------------|--|--|-----------|---|----------|
| Importance (weight)               | 0.6000                      | 0.2000                        | 0.1000                                     | 0.1000                                 |           |   |          |
| Social and Economic Policy        | 0.0000                      | 0.0647                        | 0.0000                                     | 0.0000                                 | 0.0647    |   | ○        |
| Health and Nutrition              | 0.0312                      | 0.0632                        | 0.0111                                     | 0.0000                                 | 0.1056    | 3 | ○        |
| Education                         | 0.0224                      | 0.0088                        | 0.0000                                     | 0.0167                                 | 0.0479    | 6 |          |
| Agriculture and Rural Development | 0.0568                      | 0.0000                        | 0.0111                                     | 0.0000                                 | 0.0679    | 5 |          |
| Manufacturing                     | 0.1509                      | 0.0338                        | 0.0111                                     | 0.0167                                 | 0.2125    | 2 | ○        |
| Environment/ Disaster Management  | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0333                                 | 0.0333    |   | ○        |
| Governance and Security           | 0.0000                      | 0.0044                        | 0.0000                                     | 0.0000                                 | 0.0044    |   | ○        |
| DX Innovation                     | 0.0000                      | 0.0015                        | 0.0333                                     | 0.0000                                 | 0.0348    |   | ○        |
| Infrastructure and Every          | 0.2831                      | 0.0000                        | 0.0111                                     | 0.0167                                 | 0.3109    | 1 | ○        |
| Tourism                           | 0.0556                      | 0.0000                        | 0.0222                                     | 0.0167                                 | 0.0945    | 4 |          |
| Public-Private Partnership        | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0000                                 | 0.0000    |   | ○        |

Source: Survey Team

## (2) Sensitivity analysis

### 1) Analysis case settings

Based on the above methodology, the following case settings were made.

**Table 8-9 Sensitivity Analysis Case-based Weighting Settings (Dominican Republic)**

|  | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|--|-----------|------------------------|------------------------|------------------------|
| Economic indicator analysis  | 0.6       | 0.6                    | 0.5                    | 0.5                    |
| Investigation and arrangement of various policies for COVID-19 taken by the government | 0.2       | 0.1                    | 0.1                    | 0.1                    |
| Development partner survey results   | 0.1       | 0.2                    | 0.2                    | 0.3                    |
| Country-specific development cooperation policy  | 0.1       | 0.1                    | 0.2                    | 0.1                    |

Source: Survey Team

### 2) Summary of sensitivity analysis

The results of each sensitivity analysis are as summarized below. Sensitivity analysis did not show much change, which was close to the result of the base case. Error! The link is incorrect.

**Table 8-10 Summary of Sensitivity Analysis Results (Dominican Republic)**

|                                   | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|-----------------------------------|-----------|------------------------|------------------------|------------------------|
| Social and economic policy        |           |                        |                        |                        |
| Health care / nutrition           | 3         | Four                   | Four                   | Four                   |
| education                         | 6         | 6                      | 6                      | 6                      |
| Agriculture / rural development   | Five      | Five                   | Five                   | Five                   |
| Manufacturing industry            | 2         | 2                      | 2                      | 2                      |
| Environment / disaster prevention |           |                        |                        |                        |
| Governance and citizen security   |           |                        |                        |                        |
| DX / Innovation                   |           |                        |                        |                        |
| Infrastructure and Energy         | 1         | 1                      | 1                      | 1                      |
| sightseeing                       | Four      | 3                      | 3                      | 3                      |
| Public-private partnership        |           |                        |                        |                        |

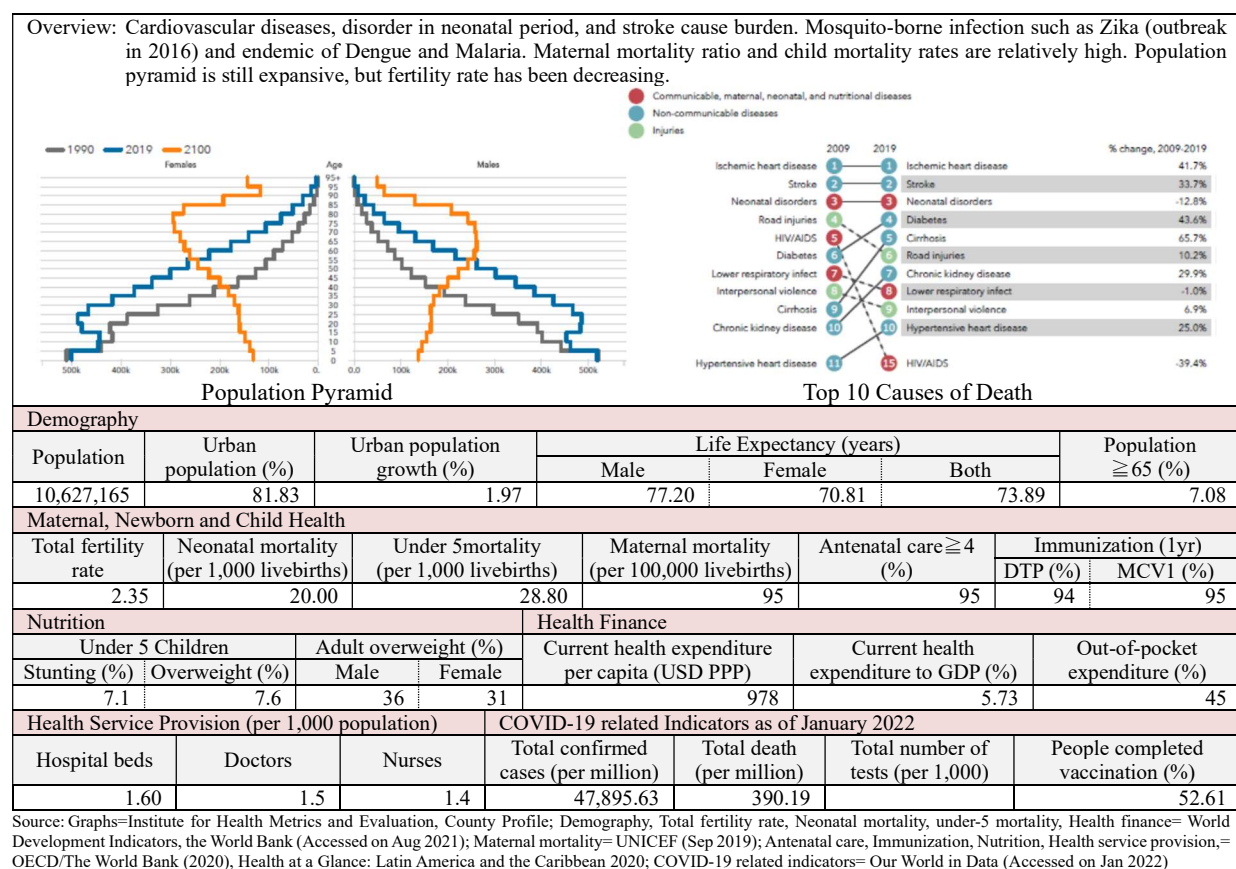
Source: Survey Team

### **(3) Selection of priority sectors by country**

From the above results, 1) social / economic policy, 2) manufacturing industry, 3) environment / disaster prevention, 4) governance / citizen security, 5) DX / innovation, 6) infrastructure / energy, 7) tourism, 8) public-private partnership are selected as priority sectors.

## 8.3 Country-specific information by sector

### 8.3.1 Health care / nutrition



| Health                                  |  |
|---|--|
| Leadership/ Governance                  | Responsible Agency: Ministerio de Salud Publica, Servicio Nacional de Salud (SNS) <a href="https://www.msp.gob.do/web/">https://www.msp.gob.do/web/</a><br>Decentralized. The Ministry of Public Health is responsible for national level, and provincial health authorities are responsible for health services at local government level.<br>Major Relevant Policies: El Plan Nacional Plurianual del Sector Publico PNPSP/ Annual Operation Plan 2021 |
| Service Providing System                | PHC model was introduced in 2014. Both public and private sector provide health services to be covered by health insurance scheme. SNS operates public health institutions. Dominican Social Security Institute (affiliated agency of the Ministry of Public Health) provides health services at local level.  |
| Health Finance                          | National health insurance with 78% coverage. But out-of-pocket expense is high. Public hospitals provide free medication since 2017.   |
| Human Resource for Health               | Remuneration is wasted because of affiliated health workers without actual working in public health institutions. US has been supporting to review wage system and increase transparency.  |
| IT/ Digital Health                      | National eHealth Strategy. Effort to introduce digital health since 2000   |
| Drugs/ Medical Equipment                | El Programa de Medicamentos Esenciales Central de Apoyo Logistico procure essential drugs. Health insurance sets sealing amount for drugs. Second-handed medical equipment is imported from US.  |
| Priority                                | Maternal, newborn and child health, especially perinatal period/ Immunization, Communicable diseases   |
| Communicable Disease Emergency Response | Necessary action and responses are undertaken along with IHR.<br>National influenza center: Laboratorio Nacional de Referencia de Influenza y otros, Virus Respiratorios   |
| Major Development Partners              | PAHO/WHO, World Bank, one UN, some bilateral donors including Global Fund and US   |
| Nutrition                               |  |
| Institutional Arrangement               | Ministerio de Salud Publica  |
| Major Relevant Policies                 | Plan Estrategico Nacional de Nutricion 2013-2016   |
| Human Resource for Health               | Nutrition related degrees: Yes<br>Nutrition related subjects in pre-service education: Yes<br>Number of nutrition related professionals: 1.3 per 100,000 population  |

Source: Survey Team with reference to WHO Country Cooperation Strategy for Dominican Republic at a glance, May 2016, Institute for Health Metrics and Evaluation, County Profile, The Borgen Project, Healthcare in the Dominican Republic, Oct 2020, JICA, Draft final report of data collection survey on UHC in Latin America and Caribbean Region, 2021 (closed), WHO, Global atlas of medical devices, 2017, and WHO, Nutrition Landscape Information System (NLIS)

### 8.3.2 Education

| Overview  |   |  |                              |                 |                 |               |
|---|---|--|------------------------------|-----------------|-----------------|---------------|
| Number of children  | Education level   | Preschool  | primary                      | Lower secondary | Upper secondary |               |
|   | 2019  | 331,521 people   | 1,300,211 people             | 535,465 people  | 405,127 people  |               |
| Source: Institute for Statistics (UIS), UNESCO Bureau of Statistics<br>93,630 teachers from public institutions, 10,189 schools (2017/18) |   |  |                              |                 |                 |               |
| Government authority  | Ministry of Education (Ministerio de Educación)   |  |                              |                 |                 |               |
| Education indicator   | Net enrollment rate: primary education 96.0%, lower secondary 94.4%, upper secondary 78.0% (2019)<br>Primary education completion rate 93.3% (2019), out-of-school children rate 4.0% (2019) Source: UIS  |  |                              |                 |                 |               |
| Learning achievement survey   | PISA (2018) 7 <sup>th</sup> grade (equivalent to 1 <sup>st</sup> grade of lower secondary school), reading average 342 points, mathematics average 325 points, science average 336 points, it is lower than OECD country average (489 points) . 79% of students in reading comprehension, 91% in mathematics, and 85% in science did not reach level 2, which states that they “understand the basics.”   |  |                              |                 |                 |               |
| Impact of COVID-19  |   |  |                              |                 |                 |               |
| School closure / reopening  | Completely closed 171 days from March 11, 2020 to February 2, 2021, the eighth longest of the 23 Central American Caribbean countries. Classes have been held remotely since February 2021, but were completely closed from September 13.   |  |                              |                 |                 |               |
| COVID-19 measures   | N / A   |  |                              |                 |                 |               |
| Distance education  | Implementation status   | Carried out a distance education that combines an online platform, a national educational portal site that provides educational content classified by grade, and radio and television broadcasting.<br>As a national digital strategy, the government launched the “Digital Republic Program” in 2016 to promote digital education, national access, productivity and employment, and the digital government. The Ministry of Education has developed “One Student-One Computer, One Teacher-One Computer” in 2018, and by December 2019, provided electronic devices to 270,760 lower secondary school students, 71,386 primary school students, and 27,850 teachers. In addition, contracts with telecommunications companies and cable companies to cover the cost of connecting students to the Internet. Digital textbooks are not available on websites. |                              |                 |                 |               |
|   | Access  | School-aged children / students who can connect to the Internet at home (%) (2014)   |                              |                 |                 |               |
|   |   |  | Rural area                   | Urban area      | Poor class      | Wealthy class |
|   | Whole school age  | 10   | 29                           | 0               | 77              | 24            |
|   | Primary Education   | 9  | 29                           | 0               | 78              | 24            |
|   | Lower secondary education   | 12   | 30                           | 0               | 75              | 25            |
|   | Upper secondary education   | 11   | 32                           | 0               | 80              | 27            |
|   | Source: UNICEF Global database on school-age digital connectivity<br>In the Cibao and Gran Santo Domingo areas, where most schools are concentrated, more than 70% of primary and secondary students have access to educational platforms and receive educational guidance through digital platforms and SNS. Installed more than 1,000 free Wi-Fi access points. Providing useful content to support teachers and parents on YouTube and WhatsApp groups. The Ministry of Education distributes 300,000 computers. (Ministry of Education HP)<br>Internet access rate for educational purposes in schools: primary education 23.16% (UNESCO) |  |                              |                 |                 |               |
|   | Teacher training  | Conducted teacher training by online (audiovisual materials, modules, exercise guides, virtual classes). Providing “EDUPLAN” educational resources.  |                              |                 |                 |               |
| School hygiene  | Infection control measures  | Development of a school hygiene guide  |                              |                 |                 |               |
|   | Facility maintenance  | It was announced that 500 schools would be intervened to take the necessary steps to meet hygiene standards.   |                              |                 |                 |               |
|   |   | 2019   | Basic water supply equipment |                 |                 |               |
|   |   | Urban area   | (Undeveloped 10%)            |                 |                 |               |
|   |   | Rural area   | (Undeveloped 12%)            |                 |                 |               |
|   | Source: World Bank / UNICEF Survey <a href="https://washdata.org/">https://washdata.org/</a>  |  |                              |                 |                 |               |

|                                       |  |
|---------------------------------------|--|
| School lunch / nutrition              | The School Food Program continues to provide food package to public school students, delivering several days.  |
| Countermeasures for vulnerable people | Higher education students are exempt from tuition from January to April 2020.  |
| Support for donors, etc.              | UNICEF: Distribution of distance learning booklets for primary and secondary education (2 million people)<br>Creating guides for teachers, raising awareness about hygiene and child rights in areas with many migrant children, developing e-learning materials for primary education children<br>OEI: Concluded a contract to evaluate preschool and primary education textbooks (June 2020) |

Source: Survey Team

### 8.3.3 Agriculture / rural development

| Urban / rural population ratio                    | 81.1% / 18.9% (FAOSTAT 2018)  |           |           |           |           |      |      |        |           |           |           |           |           |        |           |           |           |           |           |                     |         |         |         |         |           |
|---|---|-----------|-----------|-----------|-----------|------|------|--------|-----------|-----------|-----------|-----------|-----------|--------|-----------|-----------|-----------|-----------|-----------|---------------------|---------|---------|---------|---------|-----------|
| Agricultural land area                            | 2,429,000 ha (FAOSTAT 2019) 1)  |           |           |           |           |      |      |        |           |           |           |           |           |        |           |           |           |           |           |                     |         |         |         |         |           |
| Agricultural sector employment                    | 8.8% of total employment (FAOSTAT 2019) 2)  |           |           |           |           |      |      |        |           |           |           |           |           |        |           |           |           |           |           |                     |         |         |         |         |           |
| Agricultural GDP                                  | 6.0% of total GDP (World Bank 2020) 6)  |           |           |           |           |      |      |        |           |           |           |           |           |        |           |           |           |           |           |                     |         |         |         |         |           |
| Of the agricultural sector Value added amount     | \$ 4,927,481.50 thousand (including forestry) (World Bank 2020) 3)  |           |           |           |           |      |      |        |           |           |           |           |           |        |           |           |           |           |           |                     |         |         |         |         |           |
| Agricultural sector expenditure ratio             | Ratio of agricultural fiscal expenditure to national budget (%) 4)<br><table border="1"> <thead> <tr> <th></th> <th>2018</th> <th>2019</th> <th>2020</th> </tr> </thead> <tbody> <tr> <td></td> <td>2.13</td> <td>2.76</td> <td>2.11</td> </tr> </tbody> </table>   |           | 2018      | 2019      | 2020      |      | 2.13 | 2.76   | 2.11      |           |           |           |           |        |           |           |           |           |           |                     |         |         |         |         |           |
|   | 2018  | 2019      | 2020      |           |           |      |      |        |           |           |           |           |           |        |           |           |           |           |           |                     |         |         |         |         |           |
|   | 2.13  | 2.76      | 2.11      |           |           |      |      |        |           |           |           |           |           |        |           |           |           |           |           |                     |         |         |         |         |           |
| Agricultural sector import / export balance       | Trade Balance (USD1,000 FAOSTAT) 5)<br><table border="1"> <thead> <tr> <th></th> <th>2015</th> <th>2016</th> <th>2017</th> <th>2018</th> <th>2019</th> </tr> </thead> <tbody> <tr> <td>export</td> <td>2,479,439</td> <td>2,509,884</td> <td>2,815,183</td> <td>3,063,840</td> <td>3,120,149</td> </tr> <tr> <td>Import</td> <td>2,005,055</td> <td>2,033,378</td> <td>2,221,407</td> <td>2,176,024</td> <td>1,961,109</td> </tr> <tr> <td>Balance of payments</td> <td>474,384</td> <td>476,506</td> <td>593,776</td> <td>887,816</td> <td>1,159,040</td> </tr> </tbody> </table>  |           | 2015      | 2016      | 2017      | 2018 | 2019 | export | 2,479,439 | 2,509,884 | 2,815,183 | 3,063,840 | 3,120,149 | Import | 2,005,055 | 2,033,378 | 2,221,407 | 2,176,024 | 1,961,109 | Balance of payments | 474,384 | 476,506 | 593,776 | 887,816 | 1,159,040 |
|   | 2015  | 2016      | 2017      | 2018      | 2019      |      |      |        |           |           |           |           |           |        |           |           |           |           |           |                     |         |         |         |         |           |
| export  | 2,479,439   | 2,509,884 | 2,815,183 | 3,063,840 | 3,120,149 |      |      |        |           |           |           |           |           |        |           |           |           |           |           |                     |         |         |         |         |           |
| Import  | 2,005,055   | 2,033,378 | 2,221,407 | 2,176,024 | 1,961,109 |      |      |        |           |           |           |           |           |        |           |           |           |           |           |                     |         |         |         |         |           |
| Balance of payments                               | 474,384   | 476,506   | 593,776   | 887,816   | 1,159,040 |      |      |        |           |           |           |           |           |        |           |           |           |           |           |                     |         |         |         |         |           |
| Agricultural development Policy / plan / strategy | The Ministry of Agriculture (MA) has formulated the “Strategic Sector Plan for Agricultural Development (2010-2020) 7)”. The plans are “Agricultural sector reform and institutionalization and / or integration of modernization processes”, “Agricultural sector productivity and competitiveness improvement, promotion of agricultural exports”, “Strengthening domestic consumption production and domestic sales mechanism”, It consists of four strategic axes: “Development of rural infrastructure and services that catalyze poverty reduction based on a regional approach.” Specific measures include “providing subsidized loans focusing on the meat and rice supply chain”, “funding for small-scale farmers to purchase beans, bananas, and 162omini seeds, and funding mainly for mechanization of rice.” Includes “support”, “development of value chains focused on improving producer profits”, “promotion and provision of marketing information services”.  |           |           |           |           |      |      |        |           |           |           |           |           |        |           |           |           |           |           |                     |         |         |         |         |           |
| Impact of COVID-19                                | According to the IDB survey8), no food shortage was observed in the short term. The Republic of Dominica has a relatively high food self-sufficiency rate, and production during the period from January to March 2020 before COVID-19 increased from about 4 to 5% in both agriculture and livestock compared to the same period of the previous year. In addition, the fact that harvesting was completed for many crops is also considered to be a factor. The main restrictions at the start of COVID-19 were “labor shortage for harvesting”, “lack of transportation”, and “lack of market”, which reduced the sales of agricultural products. In particular, the lack of a market due to the sharp decline in the tourism industry has a large impact. In the short and medium term, there is a tendency to reduce production in order to adapt to market shortages, and as a result, it has a negative impact on farm income. This raises concerns about a negative chain of lower labor demand in rural areas and further reductions in incomes for households of rural workers who are still more economically vulnerable. Regarding imports, there are concerns that a depreciation of the dollar and pesos will occur, prices of agricultural input materials will rise, and as a result, low input productivity will decline. As a measure against COVID-19, the government provided household support and tax incentives to support consumers’ food security. In addition, we provided various support to producers and market participants whose sales decreased significantly, such as supporting the maintenance of production activities through special loans. |           |           |           |           |      |      |        |           |           |           |           |           |        |           |           |           |           |           |                     |         |         |         |         |           |
| Source / reference                                | 1) FAOSTAT-Land, Input and Sustainability-Land Use-Area-Agriculture ( <a href="https://www.fao.org/faostat/en/#data/RL">https://www.fao.org/faostat/en/#data/RL</a> )<br>2) FAOSTAT- Share of employment in agriculture (% of total employment) & Share of female employment in agriculture (% of employment in agriculture) ( <a href="https://www.fao.org/faostat/en/#data/OE">https://www.fao.org/faostat/en/#data/OE</a> )<br>3) Agriculture, forestry, and fishing, value added (constant 2015 US \$) –Latin America & Caribbean ( <a href="https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart">https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart</a> )<br>4) FAOSTAT-Government Expenditure-Share of Total Expenditure-Central Government ( <a href="https://www.fao.org/faostat/en/#data/IG">https://www.fao.org/faostat/en/#data/IG</a> )  |           |           |           |           |      |      |        |           |           |           |           |           |        |           |           |           |           |           |                     |         |         |         |         |           |



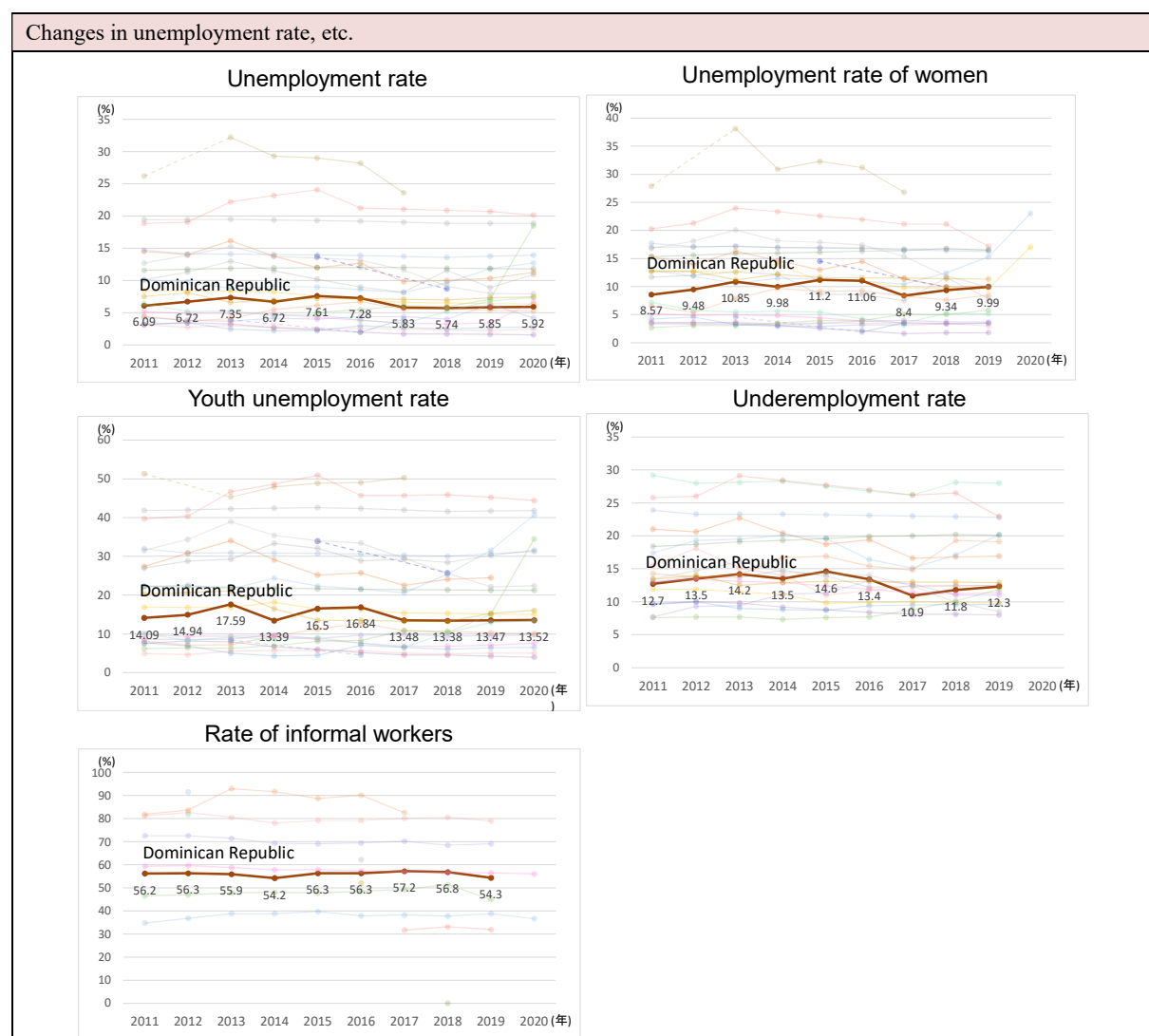
|  |   |
|--|---|
|  | <p>5) FAOSTAT-Trade-Crops and livestock products-Import / Export Value-Agricultural Products (<a href="https://www.fao.org/faostat/en/#data/TCL">https://www.fao.org/faostat/en/#data/TCL</a>)</p> <p>6) Agriculture, forestry, and fishing, value added (% of GDP) –Dominican Republic, Latin America &amp; Caribbean (<a href="https://data.worldbank.org/indicator/NV.AGR.TOTL.ZS?locations=DO-ZJ&amp;view=chart">https://data.worldbank.org/indicator/NV.AGR.TOTL.ZS?locations=DO-ZJ&amp;view=chart</a>)</p> <p>7) Plan Estratégico Sectorial de Desarrollo Agropecuario 2010-2020 (<a href="http://faolex.fao.org/docs/pdf/dom144240.pdf">http://faolex.fao.org/docs/pdf/dom144240.pdf</a>)</p> <p>8) El impacto de la COVID-19 en la seguridad alimentaria de República Dominicana, 2020, IDB (<a href="https://blogs.iadb.org/sostenibilidad/es/el-impacto-de-la-COVID-19-en-la-seguridad-alimentaria-de-republica-dominicana/">https://blogs.iadb.org/sostenibilidad/es/el-impacto-de-la-COVID-19-en-la-seguridad-alimentaria-de-republica-dominicana/</a>)</p> |
|--|---|

### 8.3.4 Private sector

The Dominican Republic is the third largest economy in Central America and the Caribbean, the second, excluding Cuba, where the accuracy of the figures is doubtful. On the other hand, GDP per capita (12th) and minimum wage (16th) are slightly lower. The unemployment rate is not low, and no major changes have been seen in the last 10 years.

|              | Index                      | Value  | Ranking                 | Year | Source     |
|--------------|----------------------------|--------|-------------------------|------|------------|
| Productivity | GDP per capita (USD)       | 7,268  | 12 (Among 22 countries) | 2020 | World Bank |
|              | GDP per worker (USD)       | 40,616 | 7 (Among 18 countries)  | 2019 | World Bank |
| Employment   | Minimum wage (USD / month) | 189    | 16 (Among 23 countries) | 2019 | ILO        |
|              | Unemployment rate          | 5.85   | 7 (Among 22 countries)  | 2019 | Statista   |
|              | Female unemployment rate   | 9.99   | 14 (Among 22 countries) | 2019 | CEPAL      |
|              | Youth unemployment rate    | 13.47  | 9 (Among 22 countries)  | 2019 | Statista   |
|              | Underemployment rate       | 12.3   | 8 (Among 18 countries)  | 2019 | ILO        |
|              | Informal worker rate       | 54.3   | 5 (Among 12 countries)  | 2019 | CEPAL      |

Source: Described in the table



Source: World Bank, ILO, The Global Economy, etc.

### 8.3.5 Environment / disaster prevention

|                     | item   | data   | remarks                                      |
|---------------------|--|--|--|
| environment         | Environmental agency                                     | Ministerio de Medio Ambiente y Recursos Naturales – MARENA                                     |  |
|                     | Waste-related organizations                              | Ayuntamiento del Distrito Nacional   |  |
|                     | Environmental Budget (USD)                               | 2019: 202,145,888<br>2020: 274,940,130<br>2021: 230,228,592<br>Three-year average: 235,771,537 | Average: 2 <sup>nd</sup> out of 23 countries |
|                     | Environmental budget per capita (2019-2021 average, USD) | 21.7   | 7 <sup>th</sup> out of 23 countries          |
|                     | Budget ratio to national budget (2019)                   | ————   |  |
|                     | Donor support status                                     | 8 cases  | As of May 2021                               |
|                     | Renewable energy power generation (GWh) (2019)           | 536  | IRENA, 2021                                  |
|                     | Geothermal power generation capacity (Mwe)               | 2020: 0<br>2025 Forecast: 0  | WGC, 2020                                    |
| Disaster prevention | Disaster prevention organization                         | National Emergency Commission (CNE)  |  |
|                     | Donor support status                                     | 6  | As of May 2021                               |
|                     | Number of natural disasters (2010-2020)                  | 12 cases<br>Major disasters: floods,   |  |
|                     | Number of victims (persons) per 100,000 population       | 25,566 people  | 4 <sup>th</sup> out of 23 countries          |

Source: Survey Team

### 8.3.6 Governance and citizen security

| Item                                    | Overview   |
|---|--|
| Political system                        | Presidential Republic  |
| Election system                         | Elections with a relatively high level of freedom are held regularly. The president and vice president are directly elected. Next time is scheduled for 2024.  |
| Legislative system                      | Bicameral system   |
| Most recent / next legislative election | Senate: July 5, 2020 (next 2024)<br>House of Representatives: July 5, 2020 (next 2024)   |
| Appointment of judicial system / judge  | The Supreme Court and the Constitutional Court judges are appointed by the National Judiciary Council, which consists of representatives of the President, the Speakers of both Houses, the Supreme Court, and non-ruling party members. |
| Political stability                     | Region average level   |
| “Worldwide Governance Indicators”       | Among the indicators, the level of “government effectiveness” and “control of corruption” is particularly low.   |

| Global freedom status             | 67/100 points (citizen rights: 26/40 points, political rights: 41/60 points)<br>Classified as “partially free country” (Freedom House 2021)   |
|-----------------------------------|---|
| Corruption Perception Index (CPI) | 137/180 <sup>th</sup> place, 28/100 points (Transparency International 2020)  |
| E-government development index    | One of the most advanced countries in the Caribbean. In particular, in the E-participation index [1], it ranks first in the Caribbean region. A digital national ID issued. 12.40% (959,000 people) of the population do not have a national ID.  |
| Rule of law                       | According to WGI, the level of “rule of law” is lower than the regional average, but has improved since 2010.   |
| Citizen security                  | The homicide rate is lower than the Caribbean average. It has been decreasing since 2012, and in 2020, it was 9.2 / 100,000, which is half of the 21.9 / 100,000 in 2011 (Infosegura 2021).<br>The damage caused by domestic violence and gender-based violence reported from January to June 2021 increased significantly to 44.7% and 54.3%, respectively, compared to the same period in 2020. |

Source: Survey Team

### 8.3.7 DX / Innovation

|   |   |   |
|---|---|---|
| Basic indicators and statistics   | E-government ranking: 82 <sup>nd</sup>                  | Radar chart of e-government ranking<br>Central America<br>Caribbean<br>Dominican Republic<br> |
|   | Mobile connection index: 59.8                           |   |
|   | Network Infrastructure Index: 57.2                      |   |
|   | Number of Internet users 43.8                           |   |
|   | Mobile connection index 79.2                            |   |
|   | Fixed broadband rate 8.9%                               |   |
|   | Increase rate of Internet users 1.0% (compared to 2020) |   |
| Communication network   |   |   |
| <p>In the Dominican Republic, the penetration rate of fixed-line phones is 11%, which is lower than the average value of 15% for the entire Latin American region 3). This is due to the establishment of INDOTEL in addition to the private investment (PPI) of 5,876 (USD million) in major infrastructure development over the past 30 years, well below the Latin American and Caribbean average of 28,567 (USD million) 4). The annual average investment amount of ICT infrastructure in the early period (1997-1999) was 82 (USD million) 5), which is considered to be one of the causes due to the passive</p> |   |   |

investment policy compared to 330 (USD million) in the subsequent period (2000-2005). Will be.

Currently, 98% of mobile users are able to use LTE services, and the mobile market is expected to grow steadily in the future, but on the other hand, the mobile usage rate is 83.4% in rural areas and urban areas, respectively. , 90.6% 6), Internet access (regional 9.9% / city 28.4%) 6), communication terminal ownership rate such as personal computers (regional 15.2% / city 35.2%) 6) Digital divide between regions There is concern that the situation will become more serious, and efforts to correct it have become an issue for the government.

In recent years, the government has provided support for many public projects as a countermeasure. As an example, in October 2020, regulators will be able to enjoy broadband services not only by regional disparities, but also by income, society, gender, and physical conditions, so that everyone can enjoy broadband services (ICT equipment) and software (education). In addition to adopting the resolution 7) to promote the universal access business from both sides of), in many fields such as ETED (Dominica Transmission Corporation) 8) and cost reduction by developing a nationwide network backbone in cooperation with transmission network providers and sharing equipment. Enacted a law (539-20) 9) aimed at promoting the activities of.

#### National Strategy for Digital Transformation

The national digital transformation (DX) is described in National Development Strategy 20310) and is based on the following five strategic axes: (1) IT infrastructure and its availability (2) e-government and digital services (3) Human resource development (4) Productive development and innovation (5) Infrastructure development for realization

Within the framework of Digital Agenda 2016-2020 (DA 11), the government is working on the implementation of a portfolio of citizen-participatory projects “ICT access and digital literacy”, and blockchain technology and global share in national IT education. Incorporating new technologies such as ring pedagogy 12). Similarly, in the private sector, telecommunications infrastructure projects are being implemented, for example, by reducing costs by sharing IT infrastructure equipment13), it is possible to provide more attractive tariff services to users.

Due to the effects of these ICT utilization promotion projects and measures against digital devices, Internet users have increased by 273% and fixed broadband subscriptions have increased by 264% over the past decade14). We are also working on strengthening the security sector as one of the important issues, and the overall score of the Global Cyber Security Index (GSI) 15), which is an international index, is 75.05, which is the 66<sup>th</sup> among the 193 member countries of the ITU, and the United States of America. , The sixth highest number in the Americas, including Canada.

#### Characteristic efforts

Dominica Communications Institute 16) (INDOTEL) has banned user and consumer telecommunications service outages and additional charges for telecommunications service payment delays during the state of emergency declaration by COVID-19.

As a characteristic initiative, in the medical sector, as a national e-health strategy, advanced broadband connecting computer equipment of all institutions in order to enhance interoperability of each institution that constitutes the National Health Service (SNS). We have been working on the construction of networks 9), 11). We are also building a health data network that integrates the broadband network with the general health information system (SIGS) 11). Furthermore, we are promoting the introduction of electronic health records (EMR) 9), 17) for the purpose of rationalizing and streamlining the data availability of SNS by incorporating national medical records into a single information base. EMR data storage destinations are shifting from local or remote storage to cloud storage 18), contributing to faster and more efficient medical examinations and the provision of services such as telemedicine 18). (SNS launched a telemedicine project for critically ill patients in November 2020 19). )

#### source

13. E-Gov-Index: a composite indicator that consists of three indexes (Online Service Index, Telecommunication Infrastructure Index and Human Capital Index), which are equally weighted. It ranges from 0 to 1, with 1 being the most developed.
14. Mobile Connectivity Index: an input index developed by GSMA to measure the performance against the four key enablers of mobile internet adoption – infrastructure, affordability, consumer readiness and content. (<https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2016/06/Mobile-Connectivity-Launch-Report.pdf>)
15. The World Bank: Fixed telephone subscriptions (per 100 people) <https://data.worldbank.org/indicator/IT.MLT.MAIN.P2?locations=DO>
16. Private Participation in Infrastructure (PPI) –World Bank Group <https://ppi.worldbank.org/en/snapshots/country/166dominican-republic>
17. Alliance For Affordable Internet, CASE STUDY: DOMINICAN REPUBLIC, p.5 <http://a4ai.org/wp-content/uploads/2015/04/Case-Study-Dominican-Republic.pdf>
18. BRECHA DIGITAL (Digital Divide): SITUACION ACTUAL Y LOS CENTROS TECNOLOGICOS COMUNITARIOS (CTC) COMO POLITICA DE MITIGACION [https://www.researchgate.net/profile/Jose-Tavares-24/publication/323747586\\_BRECHA\\_DIGITAL\\_situacion\\_actual\\_y\\_los\\_Centros\\_Tecnologicos\\_Comunitarios\\_CTC\\_como\\_politica\\_de\\_mitigacion/links/5aa8af97a6fdce1b59cde-mitigacion.pdf](https://www.researchgate.net/profile/Jose-Tavares-24/publication/323747586_BRECHA_DIGITAL_situacion_actual_y_los_Centros_Tecnologicos_Comunitarios_CTC_como_politica_de_mitigacion/links/5aa8af97a6fdce1b59cde-mitigacion.pdf)
19. RESOLUTION No. 024-10 [https://transparencia.indotel.gob.do/media/6517/res\\_024-10.pdf](https://transparencia.indotel.gob.do/media/6517/res_024-10.pdf)
20. Dominican electricity transmission compan (Empresa de Transmisión Eléctrica Dominicana) <http://www.eted.gov.do/>
21. Decreto: 539-20 <https://transparencia.indotel.gob.do/media/214116/decreto-539-20.pdf>
22. National Development Strategy 2030: <http://idiaf.gob.do/transparencia/index.php/plan-estrategico/planeacion-estrategica?download=2244:plan-estrategico-idiaf-2020-2030-t>
23. Dominican Republic's 201620 digital agenda <http://dominicana.gob.do/index.php/recursos/2014-12-16-21-02-56/category/4-e-politicas?download=62:agenda-digital-republica-dominicana-2016-2020-dirigida-al-sector-publico>
24. ICT IN EDUCATION THE SITUATION OF DOMINICAN REPUBLIC [https://www.researchgate.net/profile/Cinthia-De-La-Rosa-Feliz/publication/339178227\\_ICT\\_IN\\_EDUCATION\\_THE\\_SITUATION\\_OF\\_DOMINICAN\\_REPUBLIC/links/5e42c53a299b1fdb91f9d17/ICT-IN-EDUCATION-THE-SITUATION-OF-DOMINICAN](https://www.researchgate.net/profile/Cinthia-De-La-Rosa-Feliz/publication/339178227_ICT_IN_EDUCATION_THE_SITUATION_OF_DOMINICAN_REPUBLIC/links/5e42c53a299b1fdb91f9d17/ICT-IN-EDUCATION-THE-SITUATION-OF-DOMINICAN)
25. DIGITAL TRANSFORMATION Infrastructure Sharing in Latin America and the Caribbean <https://publications.iadb.org/publications/english/document/Digital-Transformation-Infrastructure-Sharing-in-Latin-America-and-the-Caribbean.pdf>
26. Individuals using the Internet (% of population) –Dominican Republic <https://data.worldbank.org/indicator/IT.NET.USER.ZS?locations=DO>
27. Global Cybersecurity Index 2020 [https://www.itu.int/dms\\_pub/itu-d/opb/str/D-STR-GCI.01-2021-PDF-E.pdf](https://www.itu.int/dms_pub/itu-d/opb/str/D-STR-GCI.01-2021-PDF-E.pdf)

|     |  |
|-----|--|
| 28. | INDOTEL: Dominican Institute of Telecommunications ( <a href="https://www.indotel.gob.do/">https://www.indotel.gob.do/</a> )   |
| 29. | Electronic Medical Record<br><a href="http://www.dominicana.gob.do/index.php/e-sociedad/2014-12-17-20-08-19/item/73-historial-medico">http://www.dominicana.gob.do/index.php/e-sociedad/2014-12-17-20-08-19/item/73-historial-medico</a>   |
| 30. | Gilberto Objio Subero, article “La ironía de la ilegalidad del Expediente Médico Digital en RD”<br><a href="https://www.resumendesalud.net/157-articulos/17903-la-ironia-de-la-ilegalidad-del-expediente-medico-digital-en-rd">https://www.resumendesalud.net/157-articulos/17903-la-ironia-de-la-ilegalidad-del-expediente-medico-digital-en-rd</a> |
| 31. | Servicio Nacional de Salud (SNS), “Lanzan Proyecto de Telemedicina en Cuidados Críticos de COVID-19”<br><a href="https://sns.gob.do/noticias/lanzan-proyecto-de-telemedicina-en-cuidados-criticos-de-COVID-19/">https://sns.gob.do/noticias/lanzan-proyecto-de-telemedicina-en-cuidados-criticos-de-COVID-19/</a>                                    |

### 8.3.8 Infrastructure and Energy

|   |   |
|---|---|
| <b>Transport</b>                          |   |
| Overview                                  | Inland transportation is mainly by car.<br>The main public transport is buses and taxis, with railroads (142km, Dominican Republic government railroad), Santo Domingo Metro (2 lines, 31km), and LRT plans. There are several domestic air routes. |
| Leadership governance                     | Ministry of Public Works and Digital Economy<br>Technical Land Transportation Office / Metropolitan Transportation Authority / Land Transportation Bureau / Taxi Regulation and Administration Council / Transportation Reorganization Office       |
| Major development partners                | JICA / UNDP / IADB / GIZ  |
| <b>Energy and electricity</b>             |   |
| Overview                                  | The energy self-sufficiency rate in 2018 is 8%. 87% of the electricity energy mix is oil, coal and natural gas.   |
| Carbon neutral national plan              | National Policy on Climate Change (2013)<br>Goals: 27% reduction in GHG emissions by 2030 (NDC), 100% reduction by 2050 (President in DOMINICAN TODAY article)  |
| Leadership governance and utility company | Ministry of Public Works and the Digital Economy<br>Dominican Corporation of State Electricity Companies  |
| Major development partners                | JICA / UNDP / IADB / GIZ  |

Source: JICA Study Team with reference to various websites of the government organization and international organization (WB / IEA / IRENA / US DOE).

### 8.3.9 Tourism

Relieved immigration restrictions earlier than other countries in the region

|   |   |  |
|---|---|--|
| Number of international tourist arrivals (2019) |   | 6,446 thousand   |
| International Tourism Receipts (2019)           |   | USD 7,468 million (43 <sup>rd</sup> out of 159 countries)  |
| Tourism Competitiveness Ranking (2019)          |   | 3.8 out of 7 (73 <sup>rd</sup> out of 140 countries)<br>Highly rated fields: Priority of tourism / travel (6.0 out of 7 points, 7 <sup>th</sup> out of 140 countries)<br>Low evaluation field: Safety and security (4.7 points out of 7 points, 114 <sup>th</sup> out of 140 countries)                                      |
| Tourism Dependency Index (2019)                 |   | 24.1 (30 <sup>th</sup> out of 166 countries)   |
| Government of Japan policy                      | Number of JICA projects in the last 10 years          | 2 cases<br><ul style="list-style-type: none"> <li>• Technical Cooperation “Project to create a prosperous tourism area through public-private cooperation”</li> <li>• Technical Cooperation “Project to strengthen the mechanism for tourism development based on sustainable communities in the northern region”</li> </ul> |
|   | References to the Country Assistance Policy           | Yes (“Leverage local resources, support the promotion of the tourism industry including the area around the resort, and revitalize the local economy”)   |
|   | Interest in pilot projects                            | N / A  |
| Tourism industry vulnerability                  | Contribution of Travel & Tourism to GDP (2019)        | 16.3% (11 <sup>th</sup> out of 23 countries)   |
|   | Contribution of Travel & Tourism to employment (2019) | 17.3% (11 <sup>th</sup> out of 23 countries)   |
|   | Ratio of international spending (2019)                | 73% (12 <sup>th</sup> out of 23 countries)   |
|   | Top 3 countries of origin of visitors (2019)          | USA (33.92%)<br>Canada (13.84%)<br>France (3.28%)  |

|  |  |  |
|--|--|--|
| Importance of tourism  | Ratio of the budget amount of tourism-related ministries to the national budget amount (2019)            | N / A  |
|  | Whether or not it is mentioned as a priority sector in the National Economic and Social Development Plan | Yes<br>Plan name: Ley 1-12 Estrategia Nacional de Desarrollo 2030<br>Reference example: Objetivo Específico 3.5.5: Apoyar la competitividad, diversificación y sostenibilidad del sector turismo (p. 67) |
|  | Existence of effective national tourism policies / strategies / plans                                    | none   |
| Impact of COVID-19   | Changes in the contribution of Travel & Tourism to GDP (2019 → 2020)                                     | -57.2% (13 <sup>th</sup> out of 23 countries)  |
|  | Changes in the contribution of Travel & Tourism to employment (2019 → 2020)                              | -22.0% (19 <sup>th</sup> out of 23 countries)  |
| Number of government support measures for the tourism sector |  | 7 (Monetary policy: 5, Resumption of tourism: 1, Health and safety protocol: 1)  |

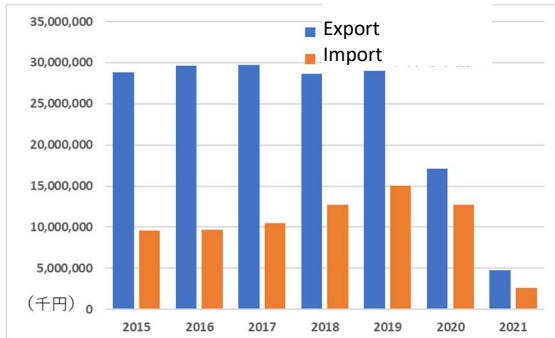
Source: Survey Team

### 8.3.10 Public-private partnership

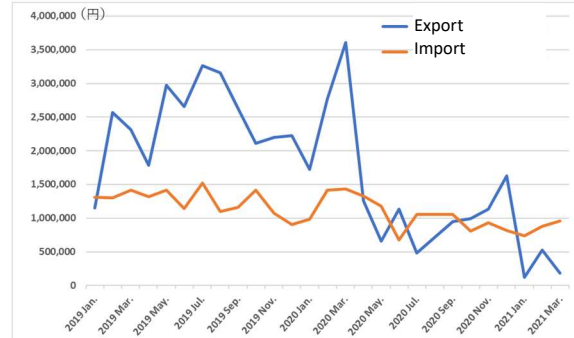
|  | item   | Contents          |
|--|--|-------------------|
| No. of JICA Public-Private Partnership Projects (After 2012)                 | Cooperation preparatory survey (overseas investment and financing) (former PPP infrastructure project)           | 0 cases           |
|  | Overseas investment and loan   | 0 cases           |
|  | SME Partnership Promotion Survey (support for Small-sized Enterprise)  | 0 cases           |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for small- and medium- sized enterprise) | 0 cases           |
|  | SDGs Business Verification Survey with Private Sector (support for small- and medium- sized enterprise)          | 0 cases           |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for large enterprise)                    | 0 cases           |
|  | SDGs Business Verification Survey with Private Sector (support for large enterprise)                             | 0 cases           |
| Total number of Japanese private companies entering the market (2019 survey) | Total number of business locations   | 13 companies      |
|  | Overseas branches of Japanese companies,   | 3 companies       |
|  | Local corporations wholly owned by Japanese companies and their branches   | 3 companies       |
|  | Branch offices wholly owned by Japanese companies and their branches   | 0 companies       |
|  | joint ventures (local corporations in which Japanese companies have a direct or indirect stake of 10% or more)   | 2 companies       |
|  | joint ventures (Branch offices in which Japanese companies have a direct or indirect stake of 10% or more)       | 0 companies       |
|  | companies established overseas by Japanese nationals (in which Japanese nationals have a stake of 10% or more)   | 5 companies       |
|  | Unknown classification   | 0 companies       |
| Number of Japanese residents (2020 survey)                                   | Total  | 778 people        |
|  | Long-term residents  | 213 people        |
|  | Permanent resident   | 565 people        |
| Business Environment   | Doing Business 2020 Rank   | 115 <sup>th</sup> |
| PPP Project  | Existence of PPP law scheme  | ○                 |
|  | PPP project with Japanese companies  | 0 cases           |

Trade trends with Japan

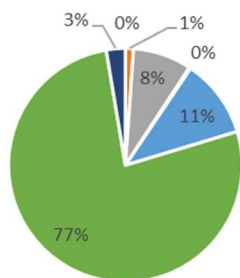
Total import / export (annual transition)  
Blue – Export / Orange - Import



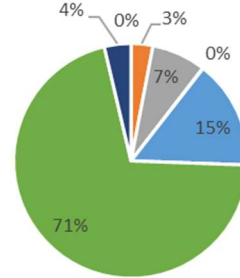
Total import / export (monthly transition)  
Blue – Export / Orange - Import



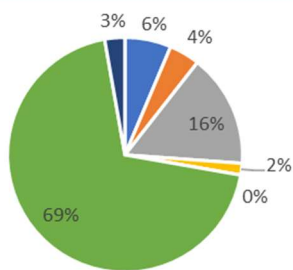
Export items (2019)



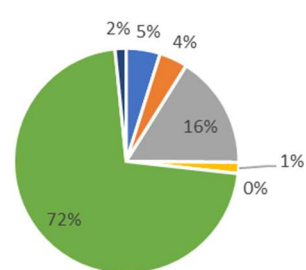
Export items (2020)



Imported items (2019)



Imported items (2020)





## Gathering information about the PPP system

| N°       | Task Item   | Inquiries/comments/status<br>Title of submitted file  | Source/URL  |
|----------|---|---|---|
| <b>1</b> | <b>PRIORITY 4_PPP Sector</b>  |   |   |
| 1.1      | PPP Projects in selective countries<br>PPP rules and regulations in Central America and Caribbean Countries |   | All below can be useful   |
| A        | PPP laws and Regulations<br>if there is any, when, and how  | <p>Law-47-20</p> <p>Regulation of application Law 47-20</p> <p>Resolutions</p> <p>Guidelines and protocols for the presentation of public initiatives</p> <p>Protocol for the Presentation of Private Initiatives</p> <p>Guidelines for the presentation of private initiatives</p>   | <p><a href="https://dgapp.gob.do/wp-content/uploads/2020/09/LEY-47-20.pdf">https://dgapp.gob.do/wp-content/uploads/2020/09/LEY-47-20.pdf</a></p> <p><a href="https://dgapp.gob.do/wp-content/uploads/2020/09/Reglamento-de-aplicacion-de-la-Ley-47-20-de-Alianzas-Publico-Privadas.pdf">https://dgapp.gob.do/wp-content/uploads/2020/09/Reglamento-de-aplicacion-de-la-Ley-47-20-de-Alianzas-Publico-Privadas.pdf</a></p> <p><a href="https://dgapp.gob.do/categorias/resoluciones/">https://dgapp.gob.do/categorias/resoluciones/</a></p> <p><a href="https://dgapp.gob.do/wp-content/uploads/2020/10/Lineamientos-para-la-presentacion-de-iniciativas-publicas.pdf">https://dgapp.gob.do/wp-content/uploads/2020/10/Lineamientos-para-la-presentacion-de-iniciativas-publicas.pdf</a></p> <p><a href="https://dgapp.gob.do/wp-content/uploads/2020/10/Protocolo-para-presentacion-de-iniciativas-privadas.pdf">https://dgapp.gob.do/wp-content/uploads/2020/10/Protocolo-para-presentacion-de-iniciativas-privadas.pdf</a></p> <p><a href="https://dgapp.gob.do/wp-content/uploads/2020/10/Lineamientos-para-la-presentacio%CC%81n-de-iniciativas-privadas.pdf">https://dgapp.gob.do/wp-content/uploads/2020/10/Lineamientos-para-la-presentacio%CC%81n-de-iniciativas-privadas.pdf</a></p> |
| B        | PPP Unit Organization<br>if there is any, how structured  | <p>The General Directorate of Public-Private Alliances is made up of a collegiate body that will be called the National Council of Public-Private Alliances and by an executive officer, appointed by the President of the Republic, who will be in charge of the direction, control and representation of the General Directorate of Public-Private Partnerships. (Law-47-20 - Article 8 - Page14)</p> <p>Subsequently, the National Council of Public-Private Alliances is created, as the highest body of the General Directorate of Public-Private Alliances, responsible for the functions of evaluation and determination of the relevance of the public-private alliances presented in accordance with this law. (Law-47-20 - Article 14- Page17)</p>  | <p><a href="https://dgapp.gob.do/wp-content/uploads/2020/09/LEY-47-20.pdf">https://dgapp.gob.do/wp-content/uploads/2020/09/LEY-47-20.pdf</a></p>  |
| C        | PPP sectors<br>in what sectors are the PPPs allowed   | <p>No restriction was mentioned for any specific sector but it mentions both in the law and in the regulation:</p> <p>Law<br/>Permits, licenses, authorizations and the so-called concessions established in sectorial laws are outside the scope of this law, when they do not conform to the definition of public-private partnership established in article 4 of this law. (Law-47-20 - Article 2 Paragraph 1- Page 5)</p> <p>Regulation<br/>Permits, licenses, authorizations and the so-called concessions established in sectorial laws are outside the scope of this regulation, provided that they are not a long-term contract for the provision, management or operation of goods or services of social interest, in the that there is total or partial investment by private agents, tangible or intangible contributions by the public sector, explicit or implicit risk distribution between both parties and the remuneration of the private agent is associated with performance in accordance with the provisions of the contract. (Regulation of application Law 47-20 - Art. 2 Paragraph II - Page 4)</p> | <p><a href="https://dgapp.gob.do/wp-content/uploads/2020/09/LEY-47-20.pdf">https://dgapp.gob.do/wp-content/uploads/2020/09/LEY-47-20.pdf</a></p> <p><a href="https://dgapp.gob.do/wp-content/uploads/2020/09/Reglamento-de-aplicacion-de-la-Ley-47-20-de-Alianzas-Publico-Privadas.pdf">https://dgapp.gob.do/wp-content/uploads/2020/09/Reglamento-de-aplicacion-de-la-Ley-47-20-de-Alianzas-Publico-Privadas.pdf</a></p>   |
| D        | Proposal Types (Solicited or Unsolicited)<br>unsolicited  | <p>Of public initiative: Those that originate in public agents and can be with or without transfers of State resources;</p> <p>Private initiative: Those that originate in private agents that propose to the Dominican State the creation of a public-private alliance (Law-47-20 - Article 29- Page 28 to 29)</p>   | <p><a href="https://dgapp.gob.do/wp-content/uploads/2020/09/LEY-47-20.pdf">https://dgapp.gob.do/wp-content/uploads/2020/09/LEY-47-20.pdf</a></p>  |
| E        | PPP Forms<br>BOT, BTO, DB, ..., what form are allowed   | <p>The 2 projects found were using the PPP Form Full. This form is when the government transfers 100 percent of the equity in the state-owned company to private entities (operator, institutional investors, and the like).<br/>See file "210520_PPP Database" sheet "Resume PPP"</p>  | <p><a href="https://ppi.worldbank.org/en/visualizacion#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CNI%2CCL&amp;header=true">https://ppi.worldbank.org/en/visualizacion#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CNI%2CCL&amp;header=true</a></p>  |
| F        | PPP types<br>Availability payment, service purchase   | Not specified in law and regulation   |   |
| G        | PPP Project Trends<br>how much PPP projects in the last 10 years  | There was no information  | <p><a href="https://ppi.worldbank.org/en/visualizacion#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CNI%2CCL&amp;header=true">https://ppi.worldbank.org/en/visualizacion#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CNI%2CCL&amp;header=true</a></p>  |
| H        | Participation of Japanese firms in PPP Projects<br>if any (check news source)                               | No information found  |   |
| I        | Any notable points for each country<br>if any   |   |   |

Source: Survey Team

## 9. El Salvador

### 9.1 Country overview (basic information)

#### 9.1.1 Basic information

Republic of El Salvador (Spanish: República de El Salvador), commonly known as El Salvador, is a republic of Latin America located in central Central America. It borders Guatemala to the northwest and Honduras to the north and east, and faces the Pacific Ocean to the south and west. Of the six Central American countries, it is the only one that does not face the Caribbean Sea. The capital is San Salvador. Although it is the smallest nation in the entire continent of the Americas other than the Caribbean countries, it has the highest population density in the Americas due to the historical progress of national land development.

El Salvador is the first country in which Japanese companies expanded overseas in 1955 after the war, and is considered to be a pro-Japanese nation. In addition, although the Republic of China (Taiwan) was approved, El Salvador accepted the diplomatic relations with Taiwan on August 21, 2018, which is a condition for establishing diplomatic relations with the People's Republic of China.

#### 9.1.2 General circumstances

|             |   |                 |   |
|-------------|---|-----------------|---|
| 1 area      | 21,040 square kilometers (about half of Kyushu) | 2 Population    | Approximately 6.64 million people (2018, Statistics Bureau)   |
| 3 Capital   | San salvador                                    | 4 ethnic groups | Mixed race of Spanish Caucasians and indigenous peoples about 84%, indigenous peoples about 5.6%, Europeans about 10% |
| 5 languages | Spanish   | 6 religion      | Catholicism   |

Source: Ministry of Foreign Affairs HP El Salvador Republic Basic Data

#### 9.1.3 Economic overview

|                          |   |                              |  |
|--------------------------|---|------------------------------|--|
| 1 Major industry         | Light industry (textile sewing industry for export), agriculture (coffee, sugar, etc.)  | 2 GDP<br>3 GNI / person      | \$ 27,022 million (2019, Central Bank)<br>US \$ 8,770 (2019) |
| 4 Economic growth rate   | 2.38% (2019, Central Bank)  | 5 Unemployment rate          | 6.3% (2019, Statistics Bureau)                               |
| 6 Price increase rate    | -0.09% (2020, Ministry of Economy)  |                              |  |
| 7 Total trade amount     | Exports (FOB): \$ 5,030 million (down 15.4% year-on-year)<br>Imports (CIF): \$ 10,593 million (down 11.8% year-on-year) (2020, Central Bank)  |                              |  |
| 8 Major trade items      | Export: clothing, sugar, paper products, coffee beans<br>Imports: Fuel, pharmaceutical supplies, telecommunications equipment, automobiles, propane gas (2020, central bank)  |                              |  |
| 9 Major trading partners | Exports: USA, Guatemala, Honduras, Nicaragua, Costa Rica<br>Imports: USA, China, Guatemala, Mexico, Honduras (2020, Central Bank)   |                              |  |
| 10 currencies            | USD   | 11 Foreign currency reserves | Approximately \$ 2.915 billion (2020, Central Bank)          |
| 12 National budget       | USD2,082,725 (2019)   | 13 External debt balance     | Approximately \$ 11.152 billion (2020, Central Bank)         |
| 14 Economic overview     | <p>After the end of the civil war in 1992, the economy maintained positive growth despite being hit by two major earthquakes and natural disasters such as hurricanes. The currency union law of 2001 has promoted the dollarization of the domestic economy, interest rates have fallen, and the inflation rate has been stable. In recent years, GDP growth has been improving, but it remains at a low level in Central America.</p> <p>Family remittances by El Salvadorians in the United States, which are said to be about 2.5 million, amounted to about \$ 5.918 billion (2020), which is equivalent to 23% of GDP and supports the El Salvadorian economy.</p> <p>Free Trade Agreement with the United States in 2006 (US / Central America / Dominican Republic Free Trade Agreement: DR-CAFTA), Taiwan in 2008, Free Trade Agreement with Colombia in 2010, EU / Central America Cooperation Agreement in 2013 Is in effect. Also, in February 2018, the Central America-Korea Free Trade Agreement (FTA) was signed.</p> |                              |  |

Source: Ministry of Foreign Affairs HP El Salvador Republic Basic Data

## 9.1.4 Country-specific development cooperation policy

### (1) Government of Japan Development Cooperation Policy by Country

**Table 9-1 Overview of Japan's ODA to El Salvador**

|   |  |
|---|--|
| <b>1. 1. Overview</b>   |  |
| Japan's economic cooperation with El Salvador begins with the signing of the Japan Overseas Cooperation Volunteers (JOCV) dispatch arrangement in 1968, the first in Latin America. Although it had been providing loan aid since 1974, the dispatch of JOCV was suspended in 1979 because the conflict between the left and right sides developed into a civil war. Small-scale grant-in-aid for aid was started in 1982, and full-scale assistance including reconstruction assistance was resumed after the end of the civil war by the peace agreement in 1992.   |  |
| <b>2. 2. Aim of development cooperation</b>   |  |
| Domestic poverty rates are still high, and vulnerability to natural disasters such as hurricanes and earthquakes still exists, stalling self-sustaining and sustainable economic growth. Currently, the track record of development cooperation in El Salvador is the basis of friendly relations between the two countries, and continuous development cooperation has the significance of strengthening bilateral relations. Furthermore, it will support the promotion of cooperative relations between Japan and Central American countries and the integration of Central America promoted by the country, and will contribute more actively to ensuring the peace, stability and prosperity of the international community. |  |
| <b>3. 3. Basic policy</b>   |  |
| Among the important development issues that the El Salvador government is working on, Japan will provide support centered on economic revitalization and employment expansion in order to promote the country's self-sustaining and sustainable development, as well as the country's disaster prevention and environmental conservation. We will also strive to support the efforts of.  |  |
| <b>4. Priority areas</b>  |  |
| (1) Support for economic revitalization and employment expansion: We will develop human resources to maximize the functions of airports, ports, bridges, etc. that Japan has supported in the past. In addition, by supporting the promotion of local industries and the promotion of domestic sales of agricultural products, we aim to foster local industries and create employment.   |  |
| (2) Support for disaster prevention and environmental conservation for sustainable development: Utilizing Japan's knowledge from the perspectives of "community disaster prevention" centered on disaster prevention education and "organizational cooperation" between the departments in charge of disaster prevention in the country. Cooperate to strengthen disaster prevention capabilities. In addition, we will support efforts for environmental conservation such as climate change countermeasures.  |  |
| (3) Support for promoting inclusive development: We will continue to support the development of human resources in the field of health as well as the dissemination of basic education and the improvement of education standards. In addition, from the perspective of ensuring the safety of citizens, we will support the spread and promotion of the regional police system.  |  |

Source: Ministry of Foreign Affairs HP El Salvador Country Data Collection 2017

**Table 9-2 National Development Cooperation Policy for El Salvador (February 2017)**

|  |   |
|--|---|
| <b>3. 3. Priority field (medium goal)</b>  |   |
| (1) Economic revitalization and employment expansion                               | Establishing an industrial base, logistics functions, human resource development, promotion of local industry, promotion of domestic sales of agricultural products, creation of employment |
| (2) Disaster prevention and environmental conservation for sustainable development | Cooperation for strengthening disaster prevention capacity, strengthening infrastructure as climate change countermeasures, promoting energy conservation, environmental conservation       |
| (3) Promotion of inclusive development   | Dissemination of basic education, improvement of education level, human resource development in the field of health, security, dissemination and promotion of regional police system        |

Source: Survey Team

### (2) Development partner survey results

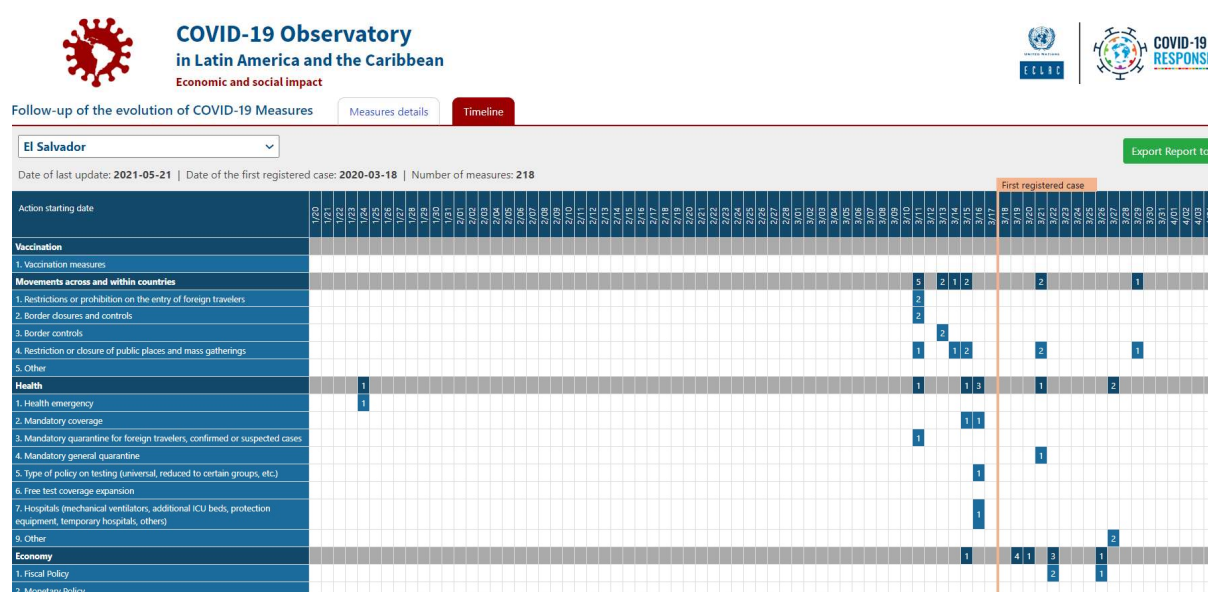
We extracted sector names and specific quantitative figures that have a large impact on the country-specific analysis described in various reports of development partners. Reports from the World Bank, OECD, BCIE, SICA, and the Ministry of Economy, Trade and Industry of Japan suggest the importance of introducing digitalization and innovation (Fintech, Aggrotech, Autotech, etc.), and incorporate the survey results of these development partners. I arranged it accordingly.

World Bank: "Growth and Revitalization" 2021 Semi-Annual Economic Report (March 2021)

- ✓ OECD: COVID-19 in LAC, Regional socio-economic implications and policy priorities (December 2020)
- ✓ BCIE: Impacto Económico del COVID-19 (April 2020)
- ✓ SICA: Estimación del Impacto Económico del COVID-19 en Centroamérica y República Dominicana (April 2020)
- ✓ Ministry of Economy, Trade and Industry of Japan: “The ideal way of economic and industrial policy based on the influence of the new corona virus” (June 2020), Accelerating digitalization and onlineization, gig economy, innovation in the transition period to a new daily life 1) Medical care / health, 2) Digital: Infrastructure development premised on the arrival of a digital society, 3) Green: Response to climate change problems, Energy security, 4) Emphasizes resilience.

### 9.1.5 Policies for COVID-19 measures taken by governments of each country

Various policies for COVID-19 taken by the government are described on the ECLAC homepage “COVID-19 Observatory” by country, time series, and field, and can be analyzed.



Source: <https://cepalstat-prod.cepal.org/forms/covid-countrysheet/index.html?table=2&country=DOM>

In this survey, the 130 policies implemented in El Salvador listed on this website are classified by sector as much as possible.

#### 1) Infection spread and alleviation of aggravation and death

No material was available.

#### 2) Support for affected industries and people

**Table 9-3 Support for Affected Industries and People (El Salvador)**

| Various government policies (COVID-19 Observatory for LAC) |    |  |  |
|--|----|--|--|
| Socioeconomic policy                                       | 44 |  |  |
| Health care & nutrition                                    | 38 |  |  |
| Education  | 14 |  |  |
| Agriculture & rural development                            | 0  |  |  |
| Private sector   | 11 |  |  |
| Environment & disaster prevention                          | 0  |  |  |
| Governance and social security                             | 4  |  |  |
| DX and innovation  | 5  |  |  |
| Infrastructure & energy                                    | 0  |  |  |
| Tourism  | 0  |  |  |
| PPP  | 0  |  |  |

|            |     |  |  |
|------------|-----|--|--|
| Others (b) | 14  |  |  |
| total      | 130 |  |  |

Source: Survey Team

### 3) Arrangement of various policies for COVID-19 taken by the government

COVID-19 Observatory for Latin America and Caribbean (ECLAC) organized by governments

**Table 9-4 Government-directed COVID-19 Policy Categories (El Salvador)**

#### Follow-up of the evolution of COVID-19 Measures

| Vaccination   | Economy  | Social protection   |
|---|--|---|
| 1. Vaccination measures   | 1. Fiscal Policy   | 1. Cash transfers (new transfers, increase in existing transfers, expansion of cash transfers to new recipients, early disbursement of transfers) |
| <b>Movements across and within countries</b>  | 2. Monetary Policy   | 2. Food transfers / In-kind transfers   |
| 1. Restrictions or prohibition on the entry of foreign travelers  | 3. Business policy   | 3. Guarantee of basic services  |
| 2. Border closures and controls   | 4. Restriction of economic activity (including shops and shopping centers)                             | <b>Education / schools</b>  |
| 3. Border controls  | 5. Price and quantity controls   | 1. Suspension of classes  |
| 4. Restriction or closure of public places and mass gatherings  | 6. Economic Stimulus (includes aggregate value of fiscal measures and separately of credit guarantees) | 2. Provision of tools for distance learning (online platforms, TV, radio, distance-learning materials)  |
| 5. Other  | 7. Regulation of the personal hygiene and cleaning products market                                     | 3. Maintenance of school feeding programme (indicating under which modalities)  |
| <b>Health</b>   | 8. Debt relief and suspension of credit payments (individuals, microentrepreneurs)                     | <b>Gender</b>   |
| 1. Health emergency   | 9. Other   | 1. Gender-based violence against women  |
| 2. Mandatory coverage   | <b>Labor</b>   | 2. Care economy   |
| 3. Mandatory quarantine for foreign travelers, confirmed or suspected cases                                   | 1. Labor Protection  | 3. Employment and income generation   |
| 4. Mandatory general quarantine   | 2. Elective work leave   | 4. Benefits, transfers and other social protection measures   |
| 5. Type of policy on testing (universal, reduced to certain groups, etc.)                                     | 3. Reduction of working hours  | 5. Women's participation in the digital era   |
| 6. Free test coverage expansion   | 4. Prohibition of dismissal from work  | 6. Other  |
| 7. Hospitals (mechanical ventilators, additional ICU beds, protection equipment, temporary hospitals, others) | 5. Other   |   |

Source: Survey Team

## 9.2 Macroeconomic analysis and selection of priority countries

### 9.2.1 Macroeconomic analysis

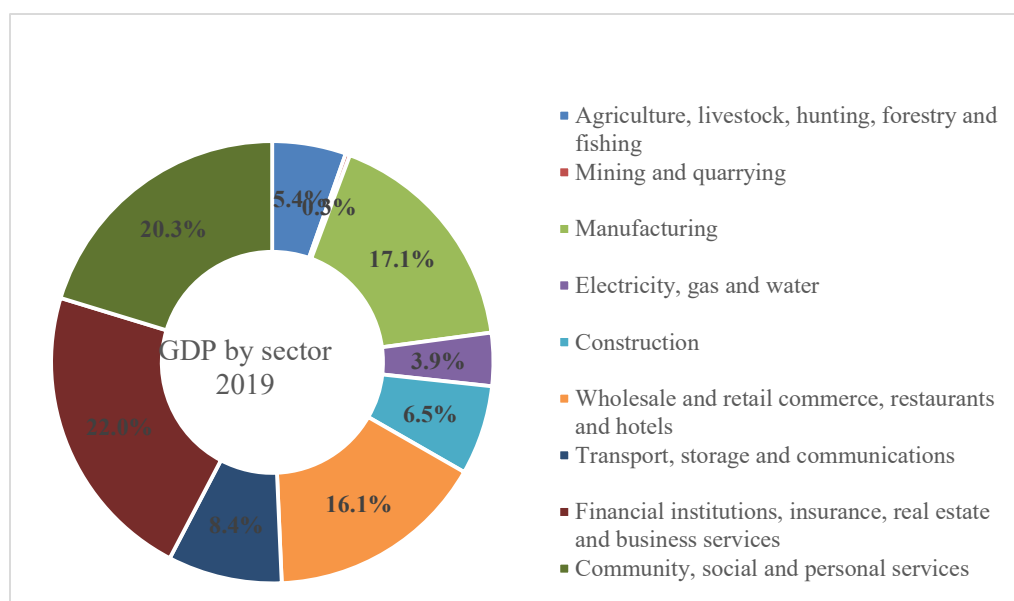
#### (1) Industrial composition

**Table 9-5 Industrial Composition (El Salvador)**

Table: Gross domestic product, by sector (precios constantes en dólares)

|  | 2011     | 2012     | 2013     | 2014     | 2015     | 2016     | 2017     | 2018     | 2019a/   | 2020 a/  |
|--|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|
| Agriculture, livestock, hunting, forestry and fishing                | 1,234.2  | 1,288.1  | 1,195.3  | 1,205.7  | 1,139.4  | 1,234.6  | 1,242.8  | 1,202.3  | 1,309.3  | 1,259.7  |
| Mining and quarrying   | 52.4     | 48.7     | 52.7     | 50.5     | 47.8     | 49.6     | 50.2     | 52.7     | 77.9     | 72.4     |
| Manufacturing  | 3,101.8  | 3,148.3  | 3,173.2  | 3,253.1  | 3,352.2  | 3,396.1  | 3,439.3  | 3,513.9  | 4,172.1  | 3,669.5  |
| Electricity, gas and water   | 781.4    | 794.7    | 775.4    | 805.9    | 798.7    | 791.1    | 807.7    | 809.2    | 948.2    | 779.4    |
| Construction   | 1,021.8  | 1,066.8  | 1,101.1  | 1,084.3  | 1,078.8  | 1,109.7  | 1,171.6  | 1,255.0  | 1,587.9  | 1,344.9  |
| Wholesale and retail commerce, restaurants and hotels                | 2,614.3  | 2,768.1  | 2,931.5  | 3,041.2  | 3,071.2  | 3,105.2  | 3,151.7  | 3,249.6  | 3,906.4  | 3,440.1  |
| Transport, storage and communications                                | 1,587.7  | 1,570.0  | 1,615.7  | 1,549.4  | 1,678.5  | 1,817.2  | 1,849.6  | 1,894.5  | 2,036.5  | 1,842.9  |
| Financial institutions, insurance, real estate and business services | 1,240.2  | 1,199.7  | 1,232.9  | 1,288.9  | 1,297.9  | 1,330.1  | 1,334.7  | 1,352.3  | 5,354.6  | 5,128.2  |
| Community, social and personal services                              | 6,104.5  | 5,886.5  | 5,743.6  | 5,598.5  | 5,773.4  | 5,697.5  | 5,742.2  | 5,725.9  | 4,943.9  | 4,744.3  |
| Total  | 17,738.3 | 17,770.9 | 17,821.4 | 17,877.5 | 18,237.9 | 18,531.1 | 18,789.8 | 19,055.4 | 24,336.8 | 22,281.4 |

Source: ECLAC



Source: Survey Team



## (2) Trends in major economic indicators

**Table 9-6 Trends in Major Economic Indicator (El Salvador)**

Table 1 EL SALVADOR: MAIN ECONOMIC INDICATORS (Annual growth rates)

|  | 2011     | 2012     | 2013     | 2014     | 2015     | 2016     | 2017     | 2018     | 2019a/   | 2020 a/  |
|--|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|
| Gross domestic product (Annual growth rates c/)                                      | 3.8      | 2.8      | 2.2      | 1.7      | 2.4      | 2.5      | 2.3      | 2.4      | 2.6      | -7.9     |
| Per capita gross domestic product (Annual growth rates c/)                           | 3.4      | 2.4      | 1.8      | 1.2      | 1.9      | 2.0      | 1.7      | 1.9      | 2.4      | -9.2     |
| Gross domestic product, by sector (Annual growth rates c/)                           |          |          |          |          |          |          |          |          |          |          |
| Agriculture, livestock, hunting, forestry and fishing                                | -4.2     | 4.4      | -7.2     | 0.9      | -5.5     | 8.4      | 0.7      | -3.3     | -0.4     | -2.4     |
| Mining and quarrying   | 18.2     | -7.1     | 8.3      | -4.2     | -5.4     | 3.9      | 1.2      | 4.9      | 4.1      | -11.2    |
| Manufacturing  | 4.2      | 1.5      | 0.8      | 2.5      | 3.0      | 1.3      | 1.3      | 2.2      | 2.0      | -11.8    |
| Electricity, gas and water   | 5.5      | 1.5      | -2.4     | 3.9      | -0.9     | -1.3     | -0.4     | -0.3     | 6.1      | 4.6      |
| Construction   | 13.4     | 4.4      | 3.2      | -1.5     | -0.5     | 2.9      | 5.6      | 7.1      | 9.8      | -15.1    |
| Wholesale and retail commerce, restaurants and hotels                                | 2.1      | 5.9      | 5.9      | 3.7      | 1.0      | 1.1      | 1.5      | 3.1      | 3.1      | -11.8    |
| Transport, storage and communications  | 6.1      | -1.3     | 2.9      | -4.1     | 8.3      | 8.2      | 1.8      | 2.4      | 1.5      | -9.1     |
| Financial institutions, insurance, real estate and business services                 | -0.8     | -3.3     | 2.8      | 4.5      | 4.7      | 2.8      | 4.5      | 2.3      | 3.7      | -4.6     |
| Community, social and personal services  | 7.7      | -3.6     | -2.4     | -2.5     | 3.1      | -1.3     | 0.8      | -0.3     | 1.5      | -6.2     |
| Balance of Payments (Millions of dollars)  |          |          |          |          |          |          |          |          |          |          |
| Current account balance  | -1,111.8 | -1,239.8 | -1,518.4 | -1,213.6 | -753.8   | -550.1   | -464.6   | -1,226.1 | -165.4   | 120.9    |
| Goods balance  | -4,772.2 | -4,916.8 | -5,289.3 | -5,286.6 | -4,970.3 | -4,653.6 | -4,844.9 | -5,936.2 | -5,710.7 | -5,204.5 |
| Exports, f.o.b.  | 4,242.6  | 4,242.2  | 4,394.9  | 4,294.4  | 4,437.0  | 4,322.3  | 4,667.4  | 4,734.8  | 4,747.7  | 4,158.1  |
| Imports, f.o.b.  | 9,014.8  | 9,159.0  | 9,684.2  | 9,581.0  | 9,407.3  | 8,975.9  | 9,512.3  | 10,671.0 | 10,458.3 | 9,362.6  |
| Services trade balance   | 449.1    | 531.3    | 670.8    | 868.0    | 959.3    | 807.5    | 733.5    | 814.4    | 1,239.1  | 679.3    |
| Income balance   | -618.2   | -870.6   | -990.2   | -1,035.4 | -1,091.9 | -1,246.4 | -1,387.6 | -1,470.2 | -1,337.4 | -1,313.8 |
| Net current transfers  | 3,829.5  | 4,016.3  | 4,090.2  | 4,240.4  | 4,349.1  | 4,542.4  | 5,034.5  | 5,365.8  | 5,643.6  | 5,959.9  |
| Capital and financial balance (Millions of dollars)                                  |          |          |          |          |          |          |          |          |          |          |
| Net foreign direct investment d/   | 218.4    | 466.0    | 179.1    | 306.5    | 396.4    | 347.9    | 888.8    | 826.1    | -635.8   | -201.2   |
| Other capital movements d/   | 479.3    | 1,424.5  | 1,012.6  | 874.3    | 470.4    | 654.0    | -116.2   | 402.1    | 436.6    | -555.8   |
| Remittances from emigrant workers  | 3,627.0  | 3,886.6  | 3,944.2  | 4,139.2  | 4,256.6  | 4,543.9  | 4,985.4  | 5,390.8  | 5,656.2  | 5,929.9  |
| Microfinance dispatched and the sectors that received microfinance for 2019 and 2020 |          |          |          |          |          |          |          |          |          |          |

Source: Economic Survey of Latin America and the Caribbean 2020: Main conditioning factors of fiscal and monetary policies in the post-COVID-19 era

### 9.2.2 Impact analysis and identification of key sectors

#### (1) Impact assessment results for each sector by AHP analytic hierarchy process based on economic indicators

**Table 9-7 Results of Sector Impact Analysis by COVID-19 (El Salvador)**

| ECLAC category   | Changes around COVID-19 | Trends before COVID-19 | Total GDP ratio of the sector | comprehensive evaluation |   |
|--|-------------------------|------------------------|-------------------------------|--------------------------|---|
| Importance (weight)  | 0.4590                  | 0.0660                 | 0.0750                        |                          |   |
| Agriculture, livestock, hunting, forestry and fishing                | 2                       | 1                      | 3                             | 0.027                    | 8 |
| Mining and quarrying   | 8                       | 6                      | 1                             | 0.092                    | 3 |
| Manufacturing  | 6                       | 4                      | 7                             | 0.079                    | 4 |
| Electricity, gas and water   | 1                       | 3                      | 2                             | 0.018                    | 9 |
| Construction   | 9                       | 9                      | 4                             | 0.112                    | 1 |
| Wholesale and retail commerce, restaurants and hotels                | 7                       | 8                      | 6                             | 0.093                    | 2 |
| Transport, storage and communications                                | 5                       | 7                      | 5                             | 0.070                    | 5 |
| Financial institutions, insurance, real estate and business services | 4                       | 5                      | 9                             | 0.063                    | 6 |
| Community, social and personal services                              | 3                       | 2                      | 8                             | 0.047                    | 7 |

Source: Survey Team

#### 1) Amendment of ECLAC sector classification to this sector classification and selection of priority sectors

In line with the method described in the main volume, the Sector Classification is divided into the Vertical Sector and the Cross-Cutting Sector, the ECLAC classification sector is allocated to the Vertical Sector Classification, and the evaluation of various policies related to COVID-19 taken by the



government along with the results of the partner survey and the indicators of the national development cooperation policy, the ranking of priority sectors are calculated using the four indicators, which are described in the table below.

**Table 9-8 Ranking of Priority Sectors (El Salvador)**

|                                   | Economic Indicator Analysis | Government Policy on COVID-19 | Survey on COVID-19 by Development Partners | Country Development Cooperation Policy | Base Case |   | Priority |
|-----------------------------------|-----------------------------|-------------------------------|--|--|-----------|---|----------|
| Importance (weight)               | 0.6000                      | 0.2000                        | 0.1000                                     | 0.1000                                 |           |   |          |
| Social and Economic Policy        | 0.0000                      | 0.0677                        | 0.0091                                     | 0.0125                                 | 0.0893    |   | ○        |
| Health and Nutrition              | 0.0305                      | 0.0585                        | 0.0000                                     | 0.0125                                 | 0.1015    | 3 | ○        |
| Education                         | 0.0235                      | 0.0215                        | 0.0000                                     | 0.0125                                 | 0.0576    | 6 |          |
| Agriculture and Rural Development | 0.0551                      | 0.0000                        | 0.0091                                     | 0.0125                                 | 0.0767    | 5 |          |
| Manufacturing                     | 0.1742                      | 0.0169                        | 0.0182                                     | 0.0125                                 | 0.2218    | 2 | ○        |
| Environment/ Disaster Management  | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0125                                 | 0.0125    |   | ○        |
| Governance and Security           | 0.0000                      | 0.0062                        | 0.0000                                     | 0.0125                                 | 0.0187    |   | ○        |
| DX Innovation                     | 0.0000                      | 0.0077                        | 0.0273                                     | 0.0000                                 | 0.0350    |   | ○        |
| Infrastructure and Every          | 0.2506                      | 0.0000                        | 0.0182                                     | 0.0125                                 | 0.2812    | 1 | ○        |
| Tourism                           | 0.0662                      | 0.0000                        | 0.0182                                     | 0.0000                                 | 0.0843    | 4 |          |
| Public-Private Partnership        | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0000                                 | 0.0000    |   | ○        |

Source: Survey Team

## (2) Sensitivity analysis

### 1) Analysis case settings

Based on the above methodology, the following case settings were made.

**Table 9-9 Sensitivity Analysis Case-based Weighting Settings (El Salvador)**

|  | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|--|-----------|------------------------|------------------------|------------------------|
| Economic indicator analysis  | 0.6       | 0.6                    | 0.5                    | 0.5                    |
| Investigation and arrangement of various policies for COVID-19 taken by the government | 0.2       | 0.1                    | 0.1                    | 0.1                    |
| Development partner survey results   | 0.1       | 0.2                    | 0.2                    | 0.3                    |
| Country-specific development cooperation policy  | 0.1       | 0.1                    | 0.2                    | 0.1                    |

Source: Survey Team

### 2) Summary of sensitivity analysis

The results of each sensitivity analysis are as summarized below. Sensitivity analysis did not show much change, which was close to the result of the base case.

**Table 9-10 Summary of Sensitivity Analysis Results (El Salvador)**

|                                   | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|-----------------------------------|-----------|------------------------|------------------------|------------------------|
| Social and economic policy        |           |                        |                        |                        |
| Health care / nutrition           | 3         | 5                      | 5                      | 5                      |
| education                         | 6         | 6                      | 6                      | 6                      |
| Agriculture / rural development   | 5         | 4                      | 4                      | 4                      |
| Manufacturing industry            | 2         | 2                      | 2                      | 2                      |
| Environment / disaster prevention |           |                        |                        |                        |
| Governance and citizen security   |           |                        |                        |                        |
| DX / Innovation                   |           |                        |                        |                        |
| Infrastructure and Energy         | 1         | 1                      | 1                      | 1                      |
| sightseeing                       | 4         | 3                      | 3                      | 3                      |
| Public-private partnership        |           |                        |                        |                        |

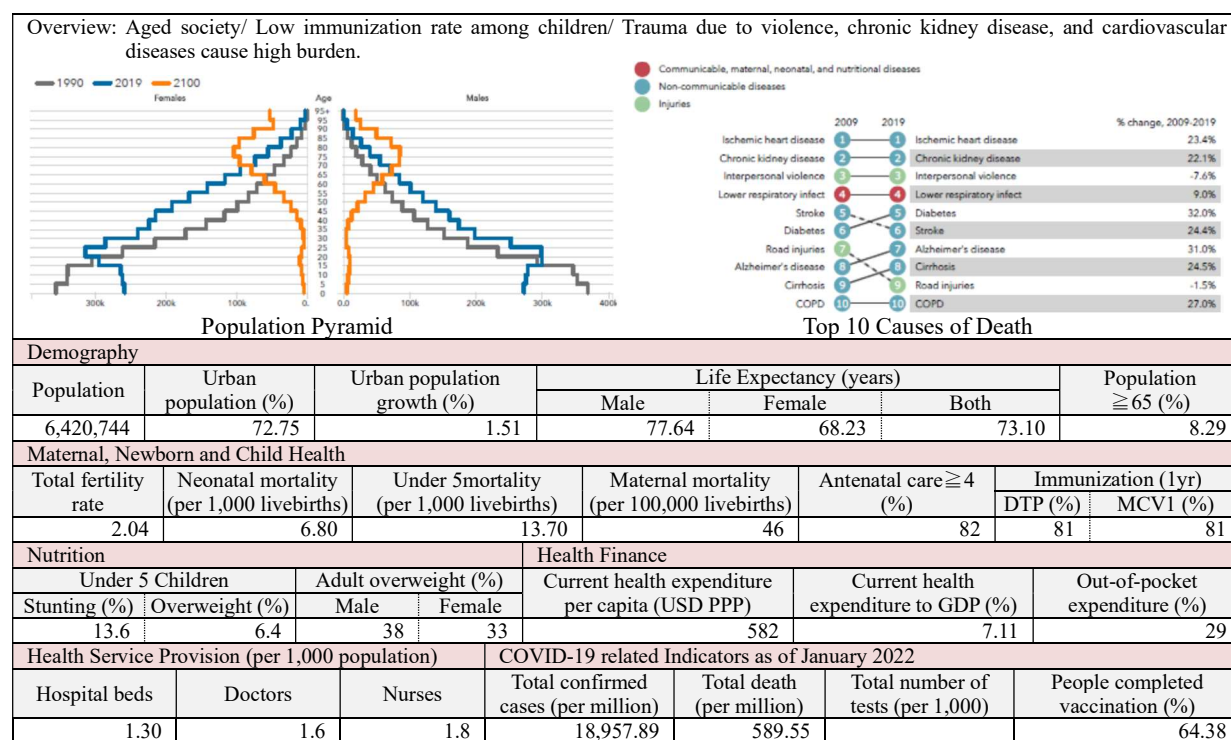
Source: Survey Team

### **(3) Selection of priority sectors by country**

From the above results, 1) social / economic policy, 2) health / medical / nutrition, 3) manufacturing, 4) environment / disaster prevention, 5) governance / citizen security, 6) DX / innovation, 7) infrastructure / energy, 8) Public-private partnership are selected as priority sectors.

## 9.3 Country-specific information by sector

### 9.3.1 Health care / nutrition



Source: Graphs=Institute for Health Metrics and Evaluation, County Profile: Demography, Total fertility rate, Neonatal mortality, under-5 mortality, Health finance= World Development Indicators, the World Bank (Accessed on Aug 2021); Maternal mortality= UNICEF (Sep 2019); Antenatal care, Immunization, Nutrition, Health service provision, = OECD/The World Bank (2020), Health at a Glance: Latin America and the Caribbean 2020; COVID-19 related indicators= Our World in Data (Accessed on Jan 2022)

| Health                                  |   |
|---|---|
| Leadership/ Governance                  | Responsible Agency: Ministerio de Salud Pública (MINSAL)<br><a href="https://www.salud.gob.sv/">https://www.salud.gob.sv/</a><br>Centralized<br>Major Relevant Policies: included in Plan Cuscatlán   |
| Service Providing System                | PHC model was enhanced in health sector reform in 2009. Public sector is major service provider (MINSAL 75%, Instituto Salvadoreño del Seguro Social (ISSS) 25%)  |
| Health Finance                          | National health insurance. Variety of insurers might decline efficiency.  |
| Human Resource for Health               | Certain number of health workers are produced, but still not enough to strengthen PHC both quality and quantity.  |
| IT/ Digital Health                      | National eHealth Strategy<br>Integrated health information system (Sistema Único de Información en Salud: SUIIS is introduced. Patient information could be shared among health facilities in accordance with the Guidelines to Standardize the Management and Protection of the Personal Data in the Clinical Records of the El Salvador Integrated Health System, 2018. |
| Drugs/ Medical Equipment                | List of recommended medical equipment for communicable diseases, noncommunicable diseases, and public health emergency. MINSAL and ISSS procure drugs and medical supplies.   |
| Priority                                | Integration of health insurance schemes/ prehospital care and emergency medical services/ strengthen of seamless care through lifecycle/ comprehensive cancer care  |
| Communicable Disease Emergency Response | Necessary action and responses are undertaken along with IHR.<br>National influenza center: "Max Bloch" Central Laboratory Unit (Unidad de Laboratorio Central "Dr. Max Bloch")   |
| Major Development Partners              | PAHO/WHO, World Bank  |
| Nutrition                               |   |
| Institutional Arrangement               | Consejo Nacional de Seguridad Alimentaria y Nutricional (CONASAN)   |
| Major Relevant Policies                 | Plan Estrategico Nacional de Seguridad Alimentaria y Nutricional 2013-2016<br>Política Nacional de Seguridad Alimentaria y Nutricional, 2011  |
| Human Resource for Health               | Nutrition related degrees: Yes<br>Nutrition related subjects in pre-service education: Yes<br>Number of nutrition related professionals: 2.1 per 100,000 population   |

Source: Survey Team with reference to WHO Country Cooperation Strategy for El Salvador at a glance, May 2016, Institute for Health Metrics and Evaluation, County Profile, JICA, Final report of data collection survey on UHC in Latin America and Caribbean Region, 2021, WHO, Global atlas of medical devices, 2017, Network of PAHO/WHO Collaborating Centers and National Reference Laboratories for Dengue in the Americas (<https://www3.paho.org/English/AD/DPC/CD/den-cc.htm>), and WHO, Nutrition Landscape Information System (NLIIS)

### 9.3.2 Education

| Overview  |  |  |                |                 |                 |
|---|--|--|----------------|-----------------|-----------------|
| Number of children  | Education level  | Preschool  | primary        | Lower secondary | Upper secondary |
|   | 2018   | 230,010 people   | 662,740 people | 308,565 people  | 213,011 people  |
| Source: Institute for Statistics (UIS), UNESCO Bureau of Statistics |  |  |                |                 |                 |
| Government authority  | Ministry of Education, Science and Technology (Ministerio de Educación, Ciencia y Tecnología)<br><br><b>Organigrama del Ministerio de Educación, Ciencia y Tecnología</b><br>Acuerdo N.º 15-0454<br><br><b>Estructura de la dirección nacional</b><br>Acuerdo N.º 15-0454  |  |                |                 |                 |
| Education indicator   | Net enrollment rate: primary education 86.3%, lower secondary 83.0%, upper secondary 66.1% (2018)<br>Primary education completion rate 86.6% (2018), out-of-school children rate 13.7% (2018), public education budget GDP ratio 3.6% (2018) Source: UIS   |  |                |                 |                 |
| Learning achievement survey   | TIMSS (Trends in International Mathematics and Science Study) 2007, 4 <sup>th</sup> grade mathematics 330 points (32 <sup>nd</sup> out of 44 countries), science 390 points (30 <sup>th</sup> out of 36 countries), 8 <sup>th</sup> grade mathematics 340 points (45 <sup>th</sup> out of 48 countries), science 380 points (45 <sup>th</sup> out of 48 countries). These are lower than the international average (500 points). In 2 <sup>nd</sup> Regional Education Quality Survey (SERCE, 2006) 3 <sup>rd</sup> grade mathematics 483 points (11 <sup>th</sup> out of 17 countries, below average), reading comprehension 496 points (10 <sup>th</sup> out of 17 countries), 6 <sup>th</sup> grade mathematics 472 points (11 <sup>th</sup> out of 17 countries below average), reading comprehension 496 points (10 <sup>th</sup> place out of 17 countries), science 479 points (6 <sup>th</sup> place out of 17 countries below average). |  |                |                 |                 |
| Impact of COVID-19  |  |  |                |                 |                 |
| School closure / reopening  | Completely closed 205 days from March 11, 2020 to February 2, 2021, the second longest of the 23 Caribbean countries in Central America, after Panama. Classes were held remotely from February to April 2021 and hybrid from May to October.  |  |                |                 |                 |
| COVID-19 measures   | Formulation of Education Strategy “Education Strategy for Pandemic Crisis Countermeasures” to Continue Learning Opportunities<br>Developing a guide for education and management for the continuation of education for children and students at all levels of education  |  |                |                 |                 |
| Distance  | Implementation   | Distribution of printed learning guides , development of distance learning system by |                |                 |                 |

|  |   |  |                              |        |
|--|---|--|------------------------------|--------|
| education  | status  | multi-platform utilizing TV, radio, and website, started to be used from May 25, 2020. Classes via the Internet are conducted in two-way distance lessons using the learning app “Google Classroom” provided by Google. Classes delivered daily on TV and radio. On the virtual education platform, learning materials are prepared for each grade and subject, and lessons are distributed via video and YouTube. Tablets / PCs are distributed to each child. The evaluation of distance lessons is carried out by each school, teacher, and district education office by devising ways such as conducting online tests and limiting the evaluation contents and subjects. |                              |        |
|  | Access  | Less than one-third of the population uses the Internet at home, and families are not accustomed to using digital media and platforms, making it difficult to study at home. Many teachers utilize their mobile phones (IDB). Internet access rate for educational purposes at school: 23.24% for primary school, 35.80% for lower secondary school, 64.38% for upper secondary school (UNESCO)  |                              |        |
|  | Teacher training  | It is assumed that more than 90% of faculty members have been trained on how to use the Google Classroom app and have been provided with a free internet data package and laptop computer, but it is actually being distributed.   |                              |        |
| School hygiene   | Infection control measures  | Toward the reopening of schools, the Ministry of Education has created and distributed guidelines for reopening schools for educational institutions and guidelines for children and parents. It can also be downloaded from the ministry’s website.   |                              |        |
|  | Facility maintenance  | 2019   | Basic water supply equipment | Toilet |
|  |   | Primary Education  | 80%                          | 87%    |
|  |   | Secondary Education  | 84%                          | 92%    |
|  |   | Urban area   | (Incomplete 3%)              | 92%    |
| Rural area   |   | (Incomplete 4%)  | 85%                          |        |
| Source: World Bank / UNICEF Survey <a href="https://washdata.org/">https://washdata.org/</a> |   |  |                              |        |
| School lunch / nutrition   | Meals are delivered to homes as a social service provided when schools are closed (BID Country Report). |  |                              |        |
| Countermeasures for vulnerable people  | N / A   |  |                              |        |
| Support for donors, etc.   | As described in the text of Progress Report 2.  |  |                              |        |

Source: Survey Team

### 9.3.3 Agriculture / rural development

|   |  |           |           |            |            |           |
|---|--|-----------|-----------|------------|------------|-----------|
| Urban / rural population ratio                    | 72.0% / 28.0% (FAOSTAT 2018)   |           |           |            |            |           |
| Agricultural land area                            | 1,195,700 ha (FAOSTAT 2019) 1)   |           |           |            |            |           |
| Agricultural sector employment                    | 21.6% of total employment (FAOSTAT 2011) 2)  |           |           |            |            |           |
| Agricultural GDP                                  | 5.1% of total GDP (World Bank 2020)  |           |           |            |            |           |
| Of the agricultural sector Value added amount     | \$ 1,336,651.34 thousand (including forestry) (World Bank 2020) 3)   |           |           |            |            |           |
| Agricultural sector expenditure ratio             | Ratio of agricultural fiscal expenditure to national budget (%) 4)   |           |           |            |            |           |
|   | 2018   | 2019      | 2020      |            |            |           |
|   | 1.70   | 0.86      | 1.27      |            |            |           |
| Of the agricultural sector Export-import balance  | Trade Balance (USD1,000 FAOSTAT) 5)  |           |           |            |            |           |
|   |  | 2015      | 2016      | 2017       | 2018       | 2019      |
|   | export   | 1,013,578 | 905,718   | 987,900    | 959,049    | 1,059,458 |
|   | Import   | 1,810,884 | 1,837,337 | 1,809,483  | 1,983,580  | 2,185,651 |
| Balance of payments                               | -797,306   | -931,619  | -821,583  | -1,024,531 | -1,126,193 |           |
| Agricultural development Policy / plan / strategy | El Salvador has a low food self-sufficiency rate, and as of 2015, for example, 93.2% of vegetables, 62.3% of grains and 55.6% of fruits depend on imports 6). The government has said that the agricultural sector has been neglected for the past 30 years and has become a country that is highly dependent on food imports. ] Has been announced. The plan consists of two plans: “Agricultural and Livestock Processing Plan for Food Sovereignty” and “Coffee Sustainable Takeoff (Economic Independence) Plan”. The former is “improvement of food self-sufficiency through efficient, low carbon and climate change resilient production with the installation of production infrastructure and high leverage of farmers”, and the latter is “economic takeoff of coffee producers (independence).” ) |           |           |            |            |           |

|                    |   |
|--------------------|---|
|                    | Is aimed at improving profitability. Based on this plan, “Implementation of National Agricultural and Livestock Plan”, “Modernization and Strengthening of Ministry of Agriculture and Agriculture”, “Strengthening Rural Policy”, “National Management” “Rebuilding Banks”, “Setting Agricultural Code (Organizing Land Ownership)”, “Establishing a New Agricultural and Livestock Research and Education Center”, “Providing Efficient Production Materials to the Agricultural and Livestock Sector”, “ Nine sub-programs of “Home / School / Community Vegetable Garden Program” and “Ruralization Program (Development of Rural Living Infrastructure)” have been set.  |
| Impact of COVID-19 | According to the IICA survey 8), agricultural exports from March to June 2020 decreased by -11.5% year-on-year, especially in May, which was a significant decrease of -38.8%. In addition, according to the report 9) of the Friedrich Ebert Foundation in Germany, “The Agrifood system in El Salvador cannot maintain a stable price under COVID-19, and it is produced due to the lack of appropriate and prompt response by the state. It causes confusion for people. “ According to FAO’s “COVID-19 Food Supply System Survey 2020” 23), the export value of fishery products in January-August 2020 was -40.5 compared to the same period of the previous year, for example, in Peru, one of the prominent fishery countries. El Salvador has increased to 22.15%, while the number of countries surveyed has decreased across the board, such as recording a%. This indicates that exports of frozen tuna, etc.24) were also strong in COVID-19.   |
| Source / reference | <ol style="list-style-type: none"> <li>1) FAOSTAT-Land, Input and Sustainability-Land Use-Area-Agriculture (<a href="https://www.fao.org/faostat/en/#data/RL">https://www.fao.org/faostat/en/#data/RL</a>)</li> <li>2) FAOSTAT- Share of employment in agriculture (% of total employment) &amp; Share of female employment in agriculture (% of employment in agriculture) (<a href="https://www.fao.org/faostat/en/#data/OE">https://www.fao.org/faostat/en/#data/OE</a>)</li> <li>3) Agriculture, forestry, and fishing, value added (constant 2015 US \$) –Latin America &amp; Caribbean (<a href="https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart">https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart</a>)</li> <li>4) FAOSTAT-Government Expenditure-Share of Total Expenditure-Central Government (<a href="https://www.fao.org/faostat/en/#data/IG">https://www.fao.org/faostat/en/#data/IG</a>)</li> <li>5) FAOSTAT-Trade-Crops and livestock products-Import / Export Value-Agricultural Products (<a href="https://www.fao.org/faostat/en/#data/TCL">https://www.fao.org/faostat/en/#data/TCL</a>)</li> <li>6) Dependencia alimentaria en El Salvador: La trascendencia de importaciones para el consumo nacional (<a href="https://www.sc.gob.sv/wp-content/uploads/Monitoreos_IE/Monitoreo%20-%20Dependencia%20alimentaria%20en%20El%20Salvador_La%20trascendencia%20de%20importaciones%20para%20el%20consumo%20nacional.Pdf">https://www.sc.gob.sv/wp-content/uploads/Monitoreos_IE/Monitoreo%20-%20Dependencia%20alimentaria%20en%20El%20Salvador_La%20trascendencia%20de%20importaciones%20para%20el%20consumo%20nacional.Pdf</a>)</li> <li>7) Plan Maestro de Rescate Agropecuario 2020-2024 (<a href="https://www.transparencia.gob.sv/institutions/mag/documents/417721/download">https://www.transparencia.gob.sv/institutions/mag/documents/417721/download</a>)</li> <li>8) Monitoreando el comercio agroalimentario durante el COVID-19, 2021, IICA (<a href="https://blog.iica.int/index.php/en/blog/monitoreando-comercio-agroalimentario-durante-COVID-19">https://blog.iica.int/index.php/en/blog/monitoreando-comercio-agroalimentario-durante-COVID-19</a>)</li> <li>9) ALIMENTAR A EL SALVADOR EN TIEMPOS DE COVID-19, 2020, FRIEDRICH EBERT STIFTUNG (<a href="http://library.fes.de/pdf-files/bueros/fesamcentral/17052.pdf">http://library.fes.de/pdf-files/bueros/fesamcentral/17052.pdf</a>)</li> </ol> |

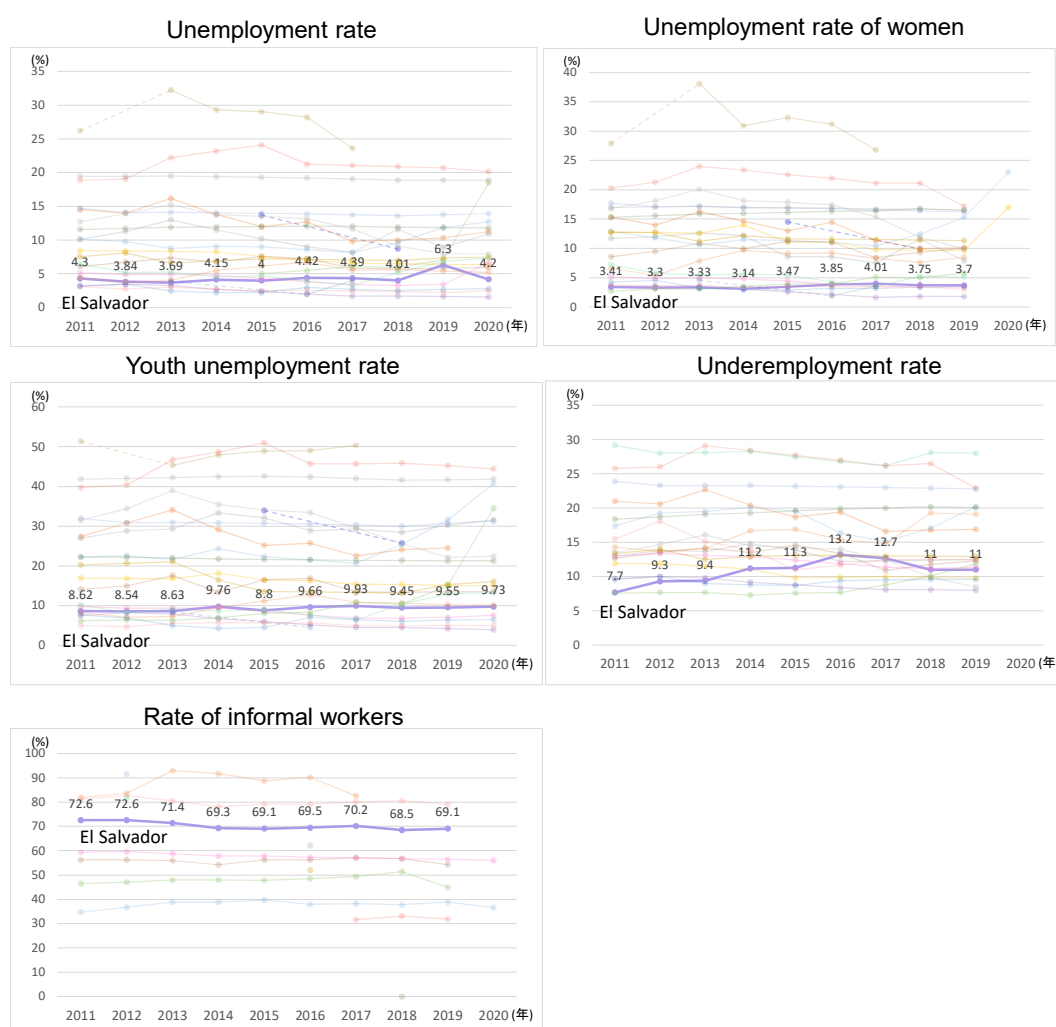
### 9.3.4 Private sector

El Salvador’s economy is large (7th), but GDP per capita is small (19th). On the other hand, the minimum wage is high compared to GDP per capita and the unemployment rate is relatively low, so the employment situation is good. It is worth mentioned that the underemployment rate has risen in the last decade.

|              | Index                      | Value  | Ranking                 | Year | Source             |
|--------------|----------------------------|--------|-------------------------|------|--------------------|
| Productivity | GDP per capita (USD)       | 3,799  | 19 (Among 22 countries) | 2020 | World Bank         |
|              | GDP per worker (USD)       | 21,180 | 13 (Among 18 countries) | 2019 | World Bank         |
| Employment   | Minimum wage (USD / month) | 304    | 10 (Among 23 countries) | 2019 | ILO                |
|              | Unemployment rate          | 6.3    | 8 (Among 22 countries)  | 2019 | Statista           |
|              | Female unemployment rate   | 3.7    | 6 (Among 22 countries)  | 2019 | The Global Economy |
|              | Youth unemployment rate    | 9.55   | 6 (Among 22 countries)  | 2019 | Statista           |
|              | Underemployment rate       | 11     | 5 (Among 18 countries)  | 2019 | ILO                |
|              | Informal worker rate       | 69.1   | 8 (Among 12 countries)  | 2019 | ILO                |

Source: Described in the table

Changes in unemployment rate, etc.



Source: World Bank, ILO, The Global Economy, etc.

### 9.3.5 Environment / disaster prevention

|                     | item   | data  | remarks                                       |
|---------------------|--|---|---|
| environment         | Environmental agency                                     | Ministerio de Ambiente  |   |
|                     | Waste-related organizations                              | ALCAL DÍA DE LA CIUDAD DE SAN SALVADOR  |   |
|                     | Environmental Budget (USD)                               | 2019: 2,082,725<br>2020: 1,490,593<br>2021: 1,563,447<br>Three-year average: 1,712,255  | Average: 14 <sup>th</sup> out of 23 countries |
|                     | Environmental budget per capita (2019-2021 average, USD) | 0.3   | 15 <sup>th</sup> out of 23 countries          |
|                     | Budget ratio to national budget (2019)                   | 0.03%   | 12 <sup>th</sup> out of 23 countries          |
|                     | Donor support status                                     | 5 cases   | As of May 2021                                |
|                     | Renewable energy power generation (GWh) (2019)           | 335   | IRENA, 2021                                   |
|                     | Geothermal power generation capacity (Mwe)               | 2020: 204.00<br>2025 Forecast: 284.00   | WGC, 2020                                     |
| Disaster prevention | Disaster prevention organization                         | The National Civil Defense System for Disaster Prevention and Mitigation of El Salvador |   |
|                     | Donor support status                                     | 4 cases   | As of May 2021                                |
|                     | Number of natural disasters (2010-2020)                  | 9 cases<br>Major disasters: floods, earthquakes, droughts, landslides                   |   |



|  |  |               |                                     |
|--|--|---------------|-------------------------------------|
|  | Number of victims (persons) per 100,000 population | 22,510 people | 5 <sup>th</sup> out of 23 countries |
|--|--|---------------|-------------------------------------|

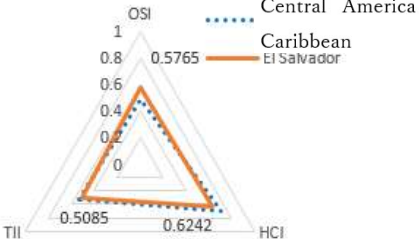
Source: Survey Team

### 9.3.6 Governance and citizen security

| Item  | Overview  |           |         |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
|---|---|-----------|---------|----------------------------|----------------------------|--------------------------|-----------------------------|------|-----|------|-----|------|-----|-------------|------|-----|------|-----|------|-----|---|-----------------------------|------|-----|------|-----|------|-----|-------------|------|-----|------|-----|------|-----|--------------------------|-----------------------------|------|-----|------|-----|------|-----|-------------|------|-----|------|-----|------|-----|--------------------|-----------------------------|------|-----|------|-----|------|-----|-------------|------|-----|------|-----|------|-----|-------------|-----------------------------|------|-----|------|-----|------|-----|-------------|------|-----|------|-----|------|-----|-----------------------|-----------------------------|------|-----|------|-----|------|-----|-------------|------|-----|------|-----|------|-----|
| Political system                                      | Presidential Republic   |           |         |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
| Election system                                       | Elections are generally reliable and free.<br>The president and vice president are elected by an absolute majority general direct election.   |           |         |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
| Legislative system                                    | Unicameral parliament   |           |         |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
| Most recent / next legislative election               | Implemented on February 28, 2021. (Next time is scheduled for 2024)   |           |         |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
| Appointment of judicial system / judge                | Appointed by Parliament on the recommendation of an independent body, the National Judicial Council and the Attorney Association.   |           |         |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
| Political stability                                   | Gradually improved over the last 10 years   |           |         |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
| “Worldwide Governance Indicators”                     | <p>In recent years, the level of “government effectiveness,” “rule of law,” and “control of corruption” has been particularly low.</p> <table border="1"> <caption>Worldwide Governance Indicators (WGI) Data (Estimated Percentile Ranks)</caption> <thead> <tr> <th>Indicator</th> <th>Country</th> <th>Year</th> <th>Percentile Rank (0 to 100)</th> </tr> </thead> <tbody> <tr> <td rowspan="6">Voice and Accountability</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">El Salvador</td> <td>2010</td> <td>~45</td> </tr> <tr> <td>2019</td> <td>~45</td> </tr> <tr> <td>2020</td> <td>~45</td> </tr> <tr> <td rowspan="6">Political Stability and Absence of Violence/Terrorism</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">El Salvador</td> <td>2010</td> <td>~45</td> </tr> <tr> <td>2019</td> <td>~45</td> </tr> <tr> <td>2020</td> <td>~45</td> </tr> <tr> <td rowspan="6">Government Effectiveness</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">El Salvador</td> <td>2010</td> <td>~35</td> </tr> <tr> <td>2019</td> <td>~35</td> </tr> <tr> <td>2020</td> <td>~35</td> </tr> <tr> <td rowspan="6">Regulatory Quality</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">El Salvador</td> <td>2010</td> <td>~45</td> </tr> <tr> <td>2019</td> <td>~45</td> </tr> <tr> <td>2020</td> <td>~45</td> </tr> <tr> <td rowspan="6">Rule of Law</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">El Salvador</td> <td>2010</td> <td>~35</td> </tr> <tr> <td>2019</td> <td>~35</td> </tr> <tr> <td>2020</td> <td>~35</td> </tr> <tr> <td rowspan="6">Control of Corruption</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">El Salvador</td> <td>2010</td> <td>~35</td> </tr> <tr> <td>2019</td> <td>~35</td> </tr> <tr> <td>2020</td> <td>~35</td> </tr> </tbody> </table> | Indicator | Country | Year                       | Percentile Rank (0 to 100) | Voice and Accountability | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | El Salvador | 2010 | ~45 | 2019 | ~45 | 2020 | ~45 | Political Stability and Absence of Violence/Terrorism | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | El Salvador | 2010 | ~45 | 2019 | ~45 | 2020 | ~45 | Government Effectiveness | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | El Salvador | 2010 | ~35 | 2019 | ~35 | 2020 | ~35 | Regulatory Quality | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | El Salvador | 2010 | ~45 | 2019 | ~45 | 2020 | ~45 | Rule of Law | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | El Salvador | 2010 | ~35 | 2019 | ~35 | 2020 | ~35 | Control of Corruption | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | El Salvador | 2010 | ~35 | 2019 | ~35 | 2020 | ~35 |
|   | Indicator   | Country   | Year    | Percentile Rank (0 to 100) |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
| Voice and Accountability                              | * Latin America & Caribbean   | 2010      | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
|   |   | 2019      | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
|   |   | 2020      | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
|   | El Salvador   | 2010      | ~45     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
|   |   | 2019      | ~45     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
|   |   | 2020      | ~45     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
| Political Stability and Absence of Violence/Terrorism | * Latin America & Caribbean   | 2010      | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
|   |   | 2019      | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
|   |   | 2020      | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
|   | El Salvador   | 2010      | ~45     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
|   |   | 2019      | ~45     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
|   |   | 2020      | ~45     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
| Government Effectiveness                              | * Latin America & Caribbean   | 2010      | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
|   |   | 2019      | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
|   |   | 2020      | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
|   | El Salvador   | 2010      | ~35     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
|   |   | 2019      | ~35     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
|   |   | 2020      | ~35     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
| Regulatory Quality                                    | * Latin America & Caribbean   | 2010      | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
|   |   | 2019      | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
|   |   | 2020      | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
|   | El Salvador   | 2010      | ~45     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
|   |   | 2019      | ~45     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
|   |   | 2020      | ~45     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
| Rule of Law   | * Latin America & Caribbean   | 2010      | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
|   |   | 2019      | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
|   |   | 2020      | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
|   | El Salvador   | 2010      | ~35     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
|   |   | 2019      | ~35     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
|   |   | 2020      | ~35     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
| Control of Corruption                                 | * Latin America & Caribbean   | 2010      | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
|   |   | 2019      | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
|   |   | 2020      | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
|   | El Salvador   | 2010      | ~35     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
|   |   | 2019      | ~35     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
|   |   | 2020      | ~35     |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
| Global freedom status                                 | 63/100 points (citizen rights: 30/40 points, political rights: 33/60 points)<br>Classified as “free country” (Freedom House 2021)   |           |         |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
| Corruption Perception Index (CPI)                     | 104/180 <sup>th</sup> place, 36/100 points (Transparency International 2020).   |           |         |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
| E-government development index                        | It is slightly below the Latin American average level, and only in terms of human capital is lower than the regional average level. A Digital National ID issued.   |           |         |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
| Rule of law   | According to WGI, the index for “rule of law” is very low, and remains an issue.  |           |         |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |
| Citizen security                                      | Dramatically improved in recent years. The latest homicide rate is 3.8 / 100,000 (2020) (Infosegura 2021).<br>Regarding GBV, the number of reported domestic violence in which women are the main victims in the past three years was 96.1 cases / month in 2019, 77.9 cases / month in 2020, and 105.4 cases / month in 2021 (Infosegura 2021).  |           |         |                            |                            |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |             |      |     |      |     |      |     |

Source: Survey Team

### 9.3.7 DX / Innovation

|  |  |   |
|--|--|---|
| <p>Basic indicators and statistics</p>   | <p>E-Government Ranking 1): 107<sup>th</sup></p> <p>Mobile connection index 2): 55.4</p> <p>Network Infrastructure Index: 51.1</p> <p>Internet user rate 50.5</p> <p>Mobile connection rate 145.6</p> <p>Fixed broadband rate 7.7</p> <p>Rate of increase in the number of Internet users 14.7 (2021/2020)</p> | <p>Radar chart of e-government ranking</p>  |
| <p><b>Communication network</b></p>  |  |   |
| <p>El Salvador's landline penetration rate 3) has gradually declined from its 2009 high of 17.9% to 13.8% (2019), slightly below the average of 14.8% (2019) in Latin America and the Caribbean. The spread of mobile phones instead of fixed-line phones<sup>4</sup>) has increased sharply from 19.3% to 161.1% (2019) since 2003, and mobile phones currently account for 94% of telephone lines.</p> <p>El Salvador was one of the countries with the least spread of LTE services in the region due to inadequate supply in the proper spectrum, but after the multispectral auction<sup>5</sup>) held at the end of 2019, MNOs (Mobile Network Operators) are expanding the content of services provided and improving their quality.</p> <p>The telecommunications law is the most liberalized in Latin America, allowing competition in most areas and foreign investment, but there are no regulations to promote the wholesale provision of broadband, and Claro is a fact in the DSL market. Maintaining the above monopoly.</p> <p>Corporate integration is expected to continue to flourish, including the acquisition of Caribeña Cable by Telemóvil (brand name: Tigo) in 2019. (América Móvil's plan to acquire Telefónica could not clear the regulations and was withdrawn in 2020.)</p>   |  |   |
| <p><b>National Strategy for Digital Transformation</b></p>   |  |   |
| <p>The Digital Agenda 2020-2030<sup>6</sup>) (DA) works with eight development areas of the United Nations (UN) Sustainable Development Goals (SDGs) and National Strategic Goal 7) and constitutes a nation through the application of innovation and ICT. It is a 10-year plan aimed at building mutual cooperation among all government agencies, private business organizations, and citizens. It is developed under the following four main items. 1) Digital identity. 2) Digital governance. 3) Modernization of the state government. 4) Innovation, education and competitiveness enhancement.</p> <p>In particular, as digital identity, personal data management, secure information inquiry, system development for realizing digital services used for integrated ID of various identification IDs are included, and services utilizing personal data and integrated identification IDs include. E-wallet, academic background inquiry, electronic chart</p> <p>The realization of the introduction of is included in the plan.</p>   |  |   |
| <p><b>Characteristic efforts</b></p>   |  |   |
| <p>The government has approved measures such as suspending payments for telecommunications services for three months to mitigate the economic impact of the pandemic 8).</p> <p>In the medical sector, as a measure against COVID-19, in August 2020, we started a telemedicine service for pregnant and postpartum women, children under 5 years old, and people in need of mental health care 8), 9).</p> <p>Web tools or patients and doctors are encouraged to use the same SNS tools for medical examinations.</p> <p>In the education sector, the Ministry of Education has started a training and capacity building process to train as many as 100 professional engineers for virtual education 8). SIGES (Education Management Information System) 10) has begun to use computer systems for education management, making it possible to centralize all information, and the services provided are digital platforms such as WhatsApp and mobile devices for teachers. It is provided through an application for Live Training (SIGESLive), which provides services via YouTube Live. Furthermore, by using a QR code that can be verified by SIGES, the educational background certificate is an innovative initiative that allows students to obtain a highly credible certificate by scanning with a mobile device 11).</p>  |  |   |
| <p><b>Source</b></p>   |  |   |
| <p>32. E-Gov-Index: a composite indicator that consists of three indexes (Online Service Index, Telecommunication Infrastructure Index and Human Capital Index), which are equally weighted. It ranges from 0 to 1, with 1 being the most developed.</p> <p>33. Mobile Connectivity Index: an input index developed by GSMA to measure the performance against the four key enablers of mobile internet adoption – infrastructure, affordability, consumer readiness and content. (<a href="https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2016/06/Mobile-Connectivity-Launch-Report.pdf">https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2016/06/Mobile-Connectivity-Launch-Report.pdf</a>)</p> <p>34. Fixed telephone subscriptions (per 100 people) –El Salvador<br/><a href="https://data.worldbank.org/indicator/IT.MLT.MAIN.P2?locations=SV">https://data.worldbank.org/indicator/IT.MLT.MAIN.P2?locations=SV</a></p> <p>35. Mobile cellular subscriptions (per 100 people) –El Salvador<br/><a href="https://data.worldbank.org/indicator/IT.CEL.SETS.P2?locations=SV">https://data.worldbank.org/indicator/IT.CEL.SETS.P2?locations=SV</a></p> <p>36. El Salvador will follow AWS spectrum auction with 1900MHz band sale<br/><a href="https://www.commsupdate.com/articles/2019/11/20/el-salvador-will-follow-aws-spectrum-auction-with-1900mhz-band-sale/">https://www.commsupdate.com/articles/2019/11/20/el-salvador-will-follow-aws-spectrum-auction-with-1900mhz-band-sale/</a></p> <p>37. Digital Agenda 2020-2030<br/><a href="https://www.innovacion.gob.sv/downloads/Agenda%20Digital.pdf">https://www.innovacion.gob.sv/downloads/Agenda%20Digital.pdf</a></p> <p>38. Estrategia País EL SALVADOR 2020-2024<br/><a href="https://www.pazydesarrollo.org/wp-content/uploads/2020/09/Estrategia-Pais-ESA-2020-2024.pdf">https://www.pazydesarrollo.org/wp-content/uploads/2020/09/Estrategia-Pais-ESA-2020-2024.pdf</a></p> <p>39. LAS OPORTUNIDADES DE LA DIGITALIZACIÓN EN AMÉRICA LATINA FRENTE AL COVID-19<br/><a href="https://repositorio.cepal.org/bitstream/handle/11362/45360/4/OportDigitalizaCOVID-19_es.pdf">https://repositorio.cepal.org/bitstream/handle/11362/45360/4/OportDigitalizaCOVID-19_es.pdf</a></p> <p>40. El Salvador inicia servicios de telemedicina para embarazadas, nuevas madres y otros grupos prioritarios<br/><a href="https://www.unfpa.org/es/news/el-salvador-inicia-servicios-de-telemedicina-para-embarazadas-nuevas-madres-y-otros-grupos">https://www.unfpa.org/es/news/el-salvador-inicia-servicios-de-telemedicina-para-embarazadas-nuevas-madres-y-otros-grupos</a></p> <p>41. Sistema de Información para la Gestión Educativa Salvadoreña<br/><a href="https://siges.sv/inicio">https://siges.sv/inicio</a></p> <p>42. MEMORIA DE LABORES 2019-2020<br/><a href="https://siteal.iiep.unesco.org/sites/default/files/sit_accion_files/10221.pdf">https://siteal.iiep.unesco.org/sites/default/files/sit_accion_files/10221.pdf</a></p> |  |   |

### 9.3.8 Infrastructure and Energy

| Transport                                 |  |
|---|--|
| Overview                                  | Inland transportation is mainly by car. The main public transportation is buses and taxis. There is a railroad (FENADESAL: Ferrocarriles Nacionales de El Salvador, 555km), but it is not in operation. There is a BRT system in San Salvador, but it is temporarily out of service after the COVID-19 pandemic. |
| Leadership governance                     | Vice Ministry of Transport (VMT) under Ministry of Public Works and Transportation Autonomous Executive Port Commission (CEPA)   |
| Major development partners                | JICA / UNDP / IADB   |
| Energy and electricity                    |  |
| Overview                                  | The energy self-sufficiency rate in 2019 is 31%. 71% of the energy mix of electricity is renewable energy (mainly hydropower and geothermal), including imported electricity, and the rest is mainly oil.  |
| Carbon neutral national plan              | National Energy Policy 2020-2050<br>Goal: 100% carbon neutral by 2050  |
| Leadership governance and utility company | National Energy Commission (CNE)<br>Lempa River Hydroelectric Executive Commission (CEL)   |
| Major development partners                | JICA / UNDP / IADB / GIZ   |

Source: JICA Study Team with reference to various websites of the government organization and international organization (WB / IEA / IRENA / US DOE).

### 9.3.9 Tourism

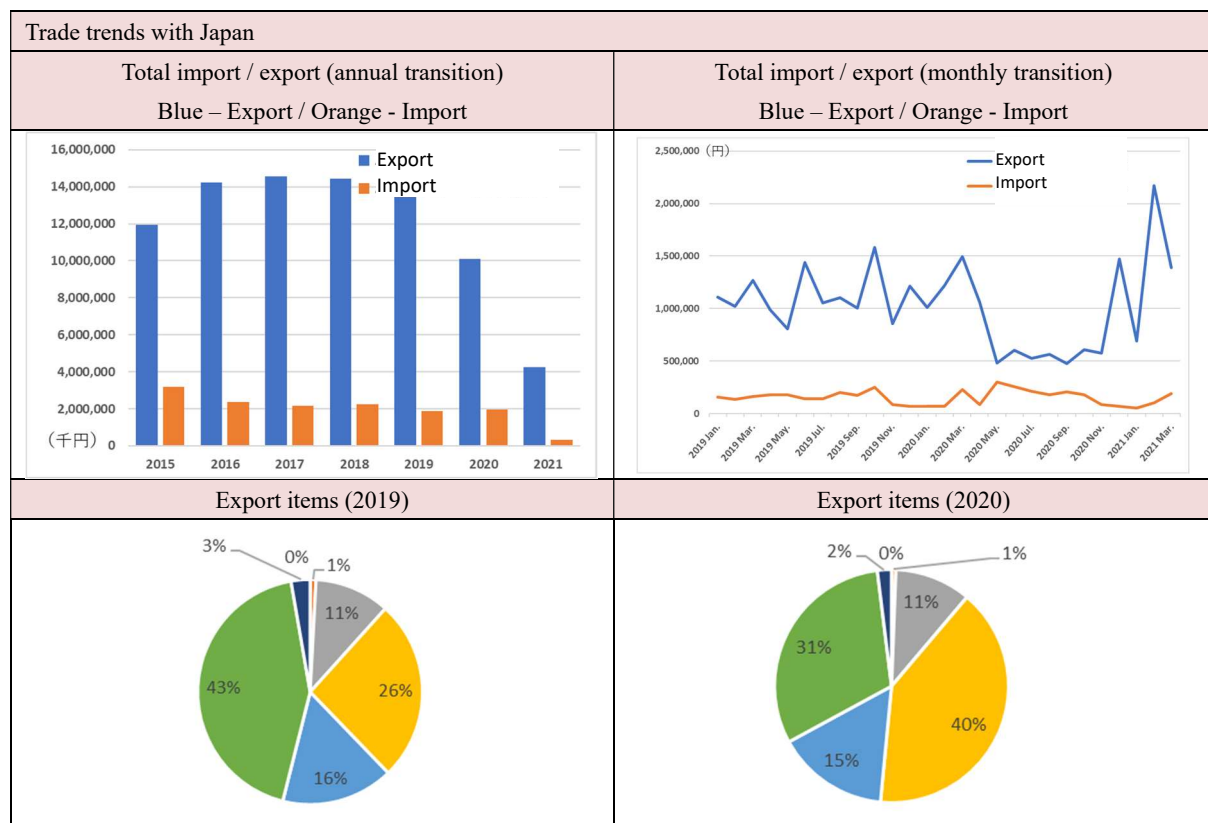
Ranked in the lowest in the "safety and security" of the tourism competitiveness ranking

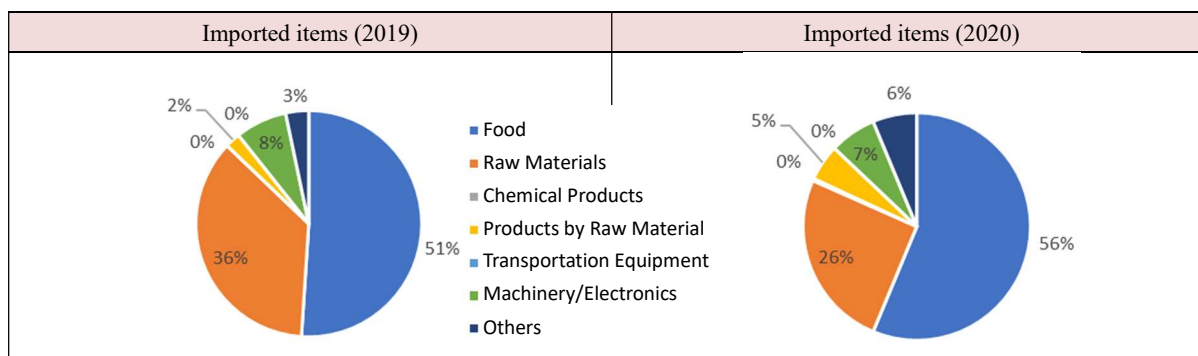
|  |  |  |
|--|--|--|
| Number of international tourist arrivals (2019)              |  | 1,766 thousand   |
| International Tourism Receipts (2019)                        |  | USD 1,306 million  |
| Tourism Competitiveness Ranking (2019)                       |  | 3.2 out of 7 (108th out of 140 countries)<br>Highly rated field: International openness (4.6 out of 7 points, 7th out of 140 countries)<br>Low evaluation field: Safety and security (3.0 out of 7 points, 140th out of 140 countries) |
| Tourism Dependency Index (2019)                              |  | 13.3 (57th out of 166 countries)   |
| Government of Japan policy                                   | Number of JICA projects in the last 10 years   | 1 (Technical Cooperative "Project for Strengthening Tourism Development Capacity in Eastern El Salvador")  |
|  | References to the Country Assistance Policy  | Yes (Eastern region "Aiming for complex regional development through human resource development that contributes to regional development and production improvement of economic activities such as agriculture, fishing and tourism")  |
|  | Interest in pilot projects   | N / A  |
| Tourism industry vulnerability                               | Contribution of Travel & Tourism to GDP (2019)   | 11.0% (16th out of 23 countries)   |
|  | Contribution of Travel & Tourism to employment (2019)  | 11.6% (16th out of 23 countries)   |
|  | Ratio of international spending (2019)   | 60% (15th out of 23 countries)   |
|  | Top 3 nationalities of visitors (2019)   | Guatemala (34.68%)<br>USA (34.00%)<br>Honduras (15.50%)  |
| Importance of tourism  | Ratio of the budget amount of tourism-related ministries to the national budget amount (2019)            | N / A  |
|  | Whether or not it is mentioned as a priority sector in the National Economic and Social Development Plan | Yes<br>Plan name: Plan Quinquenal de Desarrollo 2014-2019<br>Reference example: Eje 1: Trabajar con dignidad y crecer con as one of inclusión E.1.10. Desarrollo del turismo sostenible: "El Salvador: un destino encantador" (p. 110) |
|  | Existence of effective national tourism policies / strategies / plans                                    | Yes (Plan Nacional de Turismo El Salvador 2030)  |
| Impact of COVID-19   | Changes in the contribution of Travel & Tourism to GDP (2019 → 2020)                                     | -58.3% (12th out of 23 countries)  |
|  | Changes in the contribution of Travel & Tourism to employment (2019 → 2020)                              | -29.0% (8th out of 23 countries)   |
| Number of government support measures for the tourism sector |  | 18 (Fiscal policy: 6, monetary policy: 4, employment and skills: 2, resumption of tourism: 2, health and safety protocol: 1, others: 3)  |

Source: Survey Team

### 9.3.10 Public-private partnership

|  | item   | Contents     |
|--|--|--------------|
| No. of JICA Public-Private Partnership Projects (After 2012)                 | Cooperation preparatory survey (overseas investment and financing) (former PPP infrastructure project)           | 0 cases      |
|  | Overseas investment and loan   | 0 cases      |
|  | SME Partnership Promotion Survey (support for Small-sized Enterprise)  | 1            |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for small- and medium- sized enterprise) | 0 cases      |
|  | SDGs Business Verification Survey with Private Sector (support for small- and medium- sized enterprise)          | 0 cases      |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for large enterprise)                    | 0 cases      |
|  | SDGs Business Verification Survey with Private Sector (support for large enterprise)                             | 0 cases      |
| Total number of Japanese private companies entering the market (2019 survey) | Total number of business locations   | 13 companies |
|  | Overseas branches of Japanese companies,   | 0 companies  |
|  | Local corporations wholly owned by Japanese companies and their branches   | 3 companies  |
|  | Branch offices wholly owned by Japanese companies and their branches   | 5 companies  |
|  | joint ventures (local corporations in which Japanese companies have a direct or indirect stake of 10% or more)   | 0 companies  |
|  | joint ventures (Branch offices in which Japanese companies have a direct or indirect stake of 10% or more)       | 2 companies  |
|  | companies established overseas by Japanese nationals (in which Japanese nationals have a stake of 10% or more)   | 1 company    |
| Unknown classification   | 2 companies  |              |
| Number of Japanese residents (2020 survey)                                   | Total  | 137 people   |
|  | Long-term residents  | 75 people    |
|  | Permanent resident   | 62 people    |
| Business Environment   | Doing Business 2020 Rank   | 91st place   |
| PPP Project  | Existence of PPP law scheme  | ○            |
|  | PPP project with Japanese companies  | 0 cases      |





### Gathering information about the PPP system

| N°  | Task Item   | Inquiries/comments/status<br>Title of submitted file   | Source/URL  |
|-----|---|--|---|
| 1   | <b>PRIORITY 4 PPP Sector</b>  |  |   |
| 1.1 | PPP Projects in selective countries<br>PPP rules and regulations in Central America and Caribbean Countries |  | All below can be useful   |
| A   | PPP laws and Regulations<br>if there is any, when, and how  | Special Law of Public Private Associations<br>Regulation of the Law of Public Private Associations<br>Evaluation methodology for Public-Private Partnerships projects  | <a href="https://www.asamblea.gob.sv/sites/default/files/documents/decretos/F6D6D2AE-9DBB-41E8-A661-7D4583B300F7.pdf">https://www.asamblea.gob.sv/sites/default/files/documents/decretos/F6D6D2AE-9DBB-41E8-A661-7D4583B300F7.pdf</a><br><a href="https://drive.google.com/file/d/0B48E7Nehox7POVU3NFVodzFyNGc/view">https://drive.google.com/file/d/0B48E7Nehox7POVU3NFVodzFyNGc/view</a><br><a href="https://drive.google.com/file/d/1Ur5aVU2NjwOOA_nk18tUBwdCdSz1KSma/view">https://drive.google.com/file/d/1Ur5aVU2NjwOOA_nk18tUBwdCdSz1KSma/view</a> |
| B   | PPP Unit Organization<br>if there is any, how structured  | Management of private public associations - Export and Investment Promotion Agency of El Salvador (PROESA)<br>(Special Law of Public Private Associations - Article 14 - Page 10)  | <a href="https://www.asamblea.gob.sv/sites/default/files/documents/decretos/F6D6D2AE-9DBB-41E8-A661-7D4583B300F7.pdf">https://www.asamblea.gob.sv/sites/default/files/documents/decretos/F6D6D2AE-9DBB-41E8-A661-7D4583B300F7.pdf</a>   |
| C   | PPP sectors<br>in what sectors are the PPPs allowed   | It is applicable to all those contracts in which state entities commission a private investor; and excludes from the scope of application of this law:<br>a) The public provision of health services, including those provided by the Salvadoran Social Security Institute.<br>b) The provision of public education services, as defined in the general education law.<br>c) The University of El Salvador.<br>d) Water resources; I exceed the design, construction, repair, improvement, equipment, operation and maintenance of the infrastructure for the treatment of wastewater in the metropolitan area of San Salvador, San Miguel and Santa Ana.<br>e) The services of second public and justice.<br>(Special Law of Public Private Associations - Article 3 - Page 3)  | <a href="https://www.asamblea.gob.sv/sites/default/files/documents/decretos/F6D6D2AE-9DBB-41E8-A661-7D4583B300F7.pdf">https://www.asamblea.gob.sv/sites/default/files/documents/decretos/F6D6D2AE-9DBB-41E8-A661-7D4583B300F7.pdf</a>   |
| D   | Proposal Types (Solicited or Unsolicited)<br>unsolicited  | Both types are accepted.<br>The regulation mentions a chapter regarding the private initiative regime.<br>(Regulation of the Law of Public Private Associations - Chapter III - page 27)<br>The Public Private Partnership contracts may adopt any of the following modalities or combinations thereof; and also include stipulations accessory to the main modality that is described in each case:<br>a) Associations in which the State contracting institution delivers goods or material works of public domain to the private participant so that, as appropriate, they build, expand, equip, repair or maintain a work to be exploited and intended to provide a public service, through a public work concession. These associations are divided into:<br>i) Those that involve the delivery of goods or material works that have the nature of national assets for public use.<br>ii) Those that involve the delivery of goods or material works that have the nature of fiscal assets.<br>b) Associations in which the private participant allocates his own assets to provide a public service, through a public service concession. These associations are divided into:<br>i) Those that do not affect the private goods to the contract and that, therefore, said goods will not be transferred to the State at the end of the contract.<br>ii) Those that affect the assets used by the private party and that, therefore, said assets at the end of the contract will pass to the State by operation of law. | <a href="https://drive.google.com/file/d/0B48E7Nehox7POVU3NFVodzFyNGc/view">https://drive.google.com/file/d/0B48E7Nehox7POVU3NFVodzFyNGc/view</a>   |
| E   | PPP Forms<br>BOT, BTO, DB, ... what form are allowed  |  | -<br><a href="https://www.asamblea.gob.sv/sites/default/files/documents/decretos/F6D6D2AE-9DBB-41E8-A661-7D4583B300F7.pdf">https://www.asamblea.gob.sv/sites/default/files/documents/decretos/F6D6D2AE-9DBB-41E8-A661-7D4583B300F7.pdf</a>  |
| F   | PPP types<br>Availability payment, service purchase   | a) Self-sustaining<br>b) Co-financed<br>The criteria to specify this classification must be established in the respective bidding conditions.<br>The responsibility of the State in Public Private Partnership contracts will always be limited to its investment. (Special Law of Public Private Associations - Article 5 - Page 4)   | <a href="https://www.asamblea.gob.sv/sites/default/files/documents/decretos/F6D6D2AE-9DBB-41E8-A661-7D4583B300F7.pdf">https://www.asamblea.gob.sv/sites/default/files/documents/decretos/F6D6D2AE-9DBB-41E8-A661-7D4583B300F7.pdf</a>   |
| G   | PPP Project Trends<br>how much PPP projects in the last 10 years  | 10 (2010 to 2020)<br>- PV Gen and Grupo Roca Solar Power Plants (2015)<br>- Providencia Solar Power Plant (2015)<br>- AES El Salvador Solar Portfolio (2017)<br>- Acajutla Gas-Fired Power Plant and LNG Terminal (2019)<br>and others<br>See file "210520 PPP Database"   | <a href="https://ppi.worldbank.org/en/visualization/#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mbd=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CCLC&amp;header=true">https://ppi.worldbank.org/en/visualization/#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mbd=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CCLC&amp;header=true</a>                   |
| H   | Participation of Japanese firms in PPP Projects<br>if any (check news source)                               | An information search was carried out but no relevant information could be found.<br><br>For the participation of Japanese Firms in PPP Projects there was information about irregular process and a Japanese firm requesting the investigation. And evaluation of a PPP carried out by JICA   | -<br><a href="https://historico.elsalvador.com/historico/693017/mandas-alcaldia-de-san-salvador-videovigilancia.html">https://historico.elsalvador.com/historico/693017/mandas-alcaldia-de-san-salvador-videovigilancia.html</a><br>-<br><a href="https://www.laprensagrafica.com/economia/Concesion-del-puerto-de-La-Union-sujeta-a-estudio-del-JICA-20190906-0442.html">https://www.laprensagrafica.com/economia/Concesion-del-puerto-de-La-Union-sujeta-a-estudio-del-JICA-20190906-0442.html</a>  |
|     | Any notable points for each country<br>if any   | - Proyectos en carteras<br>- Procedimiento para desarrollar un Proyecto de Asociación Público Privado (APP)<br>- Página de socios publico privadas del gobierno, fuera de mantenimiento<br>- Analisis de inversiones al 2020, mezclado co asocio privado   | - <a href="https://www.dapp.gob.sv/Proyectos">https://www.dapp.gob.sv/Proyectos</a><br>- <a href="https://drive.google.com/file/d/1R_h9q4UJQK9D06jU9oreYhVwvBIQV-h/view">https://drive.google.com/file/d/1R_h9q4UJQK9D06jU9oreYhVwvBIQV-h/view</a><br>- <a href="http://app.proesa.gob.sv/">http://app.proesa.gob.sv/</a><br>- <a href="https://drive.google.com/file/d/1q3QhXYyabYMr4cUSaAmd4BpiaoPluy/view">https://drive.google.com/file/d/1q3QhXYyabYMr4cUSaAmd4BpiaoPluy/view</a>  |

Source: Survey Team

## 10. Grenada

### 10.1 Country overview (basic information)

#### 10.1.1 Basic information

Grenada (English: Grenada) is a constitutional monarchy located in the southern part of the Lesser Antilles in the Caribbean Sea. The capital is St. George's. It is one of the Commonwealth Kingdoms and a member of the Commonwealth of Nations. It is an island country located at the southernmost tip of the Windward Islands, with St. Vincent and the Grenadines to the north, Barbados to the northeast, and Trinidad and Tobago and Venezuela to the south. As part of the Grenadines, the Grenadines occupy islands such as Carriacou and Petite Martinique. During the post-coup turmoil in 1983, the United States and the Organization of Eastern Caribbean States (OECS) invaded Grenada, which attracted international attention. As you can see from the nutmeg fruit drawn on the left side of the national flag, nutmeg production is relatively active. As of 2005, it reached 2747 tons (6th in the world, 3% share). Other agricultural products include bananas, cloves, cinnamon and cocoa. The tourism industry is also promising, and the People's Revolutionary Government, which was established in 1979, has begun to modernize the tourism industry. After the establishment of the pro-US government after the invasion of Grenada, the capital of the United States entered the market and has continued to develop since the completion of the international airport in 1984. According to the Ministry of Foreign Affairs of Japan, Grenada's consumption tax rate of 27.5% as of March 2005 was the highest in the world (6th or lower since 2007).

#### 10.1.2 General circumstances

|             |   |                 |  |
|-------------|---|-----------------|--|
| 1 area      | 340 square kilometers (almost the same as Fukue Island in the Goto Islands) | 2 Population    | 112, 000 (2018 World Bank)   |
| 3 Capital   | St. George's  | 4 ethnic groups | African descent (82.4%), mixed race (13.3%), East Indian descent (2.2%), others (2.2%) |
| 5 languages | English (official language), Grenadian Creole                               | 6 religion      | Christianity (Catholic, Protestant, Anglican, etc.), etc.                              |

Source: Ministry of Foreign Affairs HP Grenada Basic Data

#### 10.1.3 Economic overview

|                          |   |                              |  |
|--------------------------|---|------------------------------|--|
| 1 Major industry         | Tourism, manufacturing, agriculture (cacao, nutmeg, bananas, fruits)  | 2 GNI<br>3 GNI / person      | US \$ 1.118 billion (World Bank 2019)<br>US \$ 16,050 (2019) |
| 4 Economic growth rate   | 3.12% (2019 World Bank)   | 5 Unemployment rate          | 23.6% (2017, ILO)  |
| 6 Price increase rate    | 0.8% (2018), 0.96% (2019 estimate) (IMF)  |                              |  |
| 7 Total trade amount     | Exports: US \$ 32 million (2018 WTO)<br>Import: US \$ 460 million (2018 WTO)  |                              |  |
| 8 Major trade items      | Exports: bananas, cocoa, nutmeg, fruits, vegetables, clothing, fish and shellfish<br>Imports: Food, machinery / transportation equipment, industrial products, chemical products, fuel  |                              |  |
| 9 Major trading partners | Exports: Dominica, USA, EU, Saint Lucia (2008, WTO)<br>Imports: USA, Trinidad and Tobago, EU, Japan (2009, WTO)   |                              |  |
| 10 currencies            | Eastern Caribbean Dollar (EC \$)  | 11 Foreign currency reserves | na   |
| 12 National budget       | na  | 13 External debt balance     | na   |
| 14 Economic overview     | The main industries are tourism and other service industries, which account for about 60% of GDP, and agriculture (nutmeg, banana, cacao, nikuzuku, etc.). In particular, the production of nutmeg, which is also displayed on the national flag, is the 8th largest in the world (2018, FAO), and Grenada has the nickname of "Spice Island". Although it is classified as a middle- and high-income country, it has an economic structure that is easily affected by external factors, such as being vulnerable to natural disasters such as hurricanes, and the tourism industry, which is a major industry, is easily affected by trends in the world economy. .. Hurricane Ivan in September 2004 and Hurricane Emily in July 2005 have devastated domestic infrastructure. The tourism industry recorded a high growth rate in the latter half of 1980, but the domestic economy suffered negative growth due to the terrorist attacks on the United States in 2001 and the global financial crisis in 2008. Since 2014, it has achieved economic |                              |  |



|  |
|--|
| growth of 4% to 7%, driven by the construction and tourism industries. |
|--|

Source: Ministry of Foreign Affairs HP Grenada Basic Data

## 10.1.4 Country-specific development cooperation policy

### (1) Government of Japan Development Cooperation Policy by Country

**Table 10-1 Overview of Japan's ODA to Grenada**

|  |  |
|--|--|
| <b>1. 1. Overview</b>  |  |
| Japan's economic cooperation with Grenada began with the acceptance of trainees in 1977, with Grant-in-Aid for Fisheries in 1989 and Grant-in-Aid for Grassroots Human Security in 1997. Japan is currently implementing technical cooperation and grant-in-aid for aid in the fields of disaster prevention / environment and fisheries as one of the major donor countries.  |  |
| <b>2. 2. Aim of development cooperation</b>  |  |
| There are many island nations in the Caribbean region where the members of the Caribbean Community (Calicom) including Grenada are located, and natural disasters such as hurricanes, earthquakes, and tsunamis occur frequently, and the sustainable use of marine biological resources is promoted. It has something in common with Japan in terms of promotion. In addition to being vulnerable to climate change and natural disasters, Calicom member countries are based on industries that have a small population and economy and are susceptible to external factors such as agriculture, fisheries, and tourism. , All 14 countries are included in the list of small island developing states published by the United Nations Secretariat. In order to overcome the vulnerabilities peculiar to small island developing states in the Calicom countries, it is necessary to cooperate by utilizing Japan's technology and knowledge in addition to deepening bilateral relations and socio-economics of each country. It is important from the viewpoint of financial stability and sustainable growth of the entire region.    |  |
| <b>3. 3. Basic policy</b>  |  |
| In the Development Cooperation Charter, even if the per capita income is at a certain level, for countries with special vulnerabilities such as small island developing states, necessary cooperation will be provided according to the actual development needs and burden capacity of each country. For the Caribbean Community (Calicom) member countries, the first is based on the Japan-Calicom Joint Ministerial Statement adopted at the 4th Japan-Calicom Foreign Ministers' Meeting held in November 2014. In order to "cooperate for sustainable development including overcoming vulnerabilities peculiar to small island developing states", we will develop cooperation that makes use of Japan's technology and knowledge. In accordance with these policies, Grenada will support the overcoming of vulnerabilities peculiar to small island developing states by supporting environmentally friendly sustainable social development and disaster prevention efforts. We also reaffirmed that we will cooperate in accordance with this policy at the 5th Japan-Calicom Foreign Ministers' Meeting held in September 2016. |  |
| <b>4. Priority areas</b>   |  |
| (1) Disaster prevention / environment: While strengthening the ability to respond to frequent hurricanes and natural disasters such as floods, small island developing states in the fields of climate change countermeasures, conversion to renewable energy, promotion of energy conservation, waste management, etc. Provide the support necessary to overcome the vulnerabilities peculiar to developing countries. Also pay attention to sharing knowledge with other Calicom member countries.   |  |
| (2) Fisheries: In line with Japan's shared goal of sustainable use of marine biological resources, we will continue to cooperate for the sustainable development and management of the fishery industry for industrial diversification.  |  |

Source: Ministry of Foreign Affairs HP Grenada Country Data Collection 2017

**Table 10-2 National Development Cooperation Policy for Grenada (September 2016)**

|   |  |
|---|--|
| <b>3. 3. Priority field (medium goal)</b> |  |
| (1) Disaster prevention / environment     | We are frequently hit by natural disasters such as hurricanes and floods, and we will provide support in the fields of disaster prevention and climate change countermeasures, which are urgent issues. Cooperate to promote the introduction of renewable energy and energy conservation.   |
| (2) Fisheries                             | The Grenada government has positioned the fishery industry as an important industry in the country from the perspectives of improving the nutrition and food supply of the people, acquiring foreign currency through exports, creating employment opportunities, and increasing the income of local communities, and has formulated a fishery development plan. We are focusing on the development of this field, such as promoting the modernization of the fishing industry, and will implement cooperation for sustainable development and management. |
| (3) Others                                | (1) Waste management is particularly important for small island nations whose main industry is the tourism industry, and the 3Rs (reduce waste generation, reuse resources and products, and recycle. ) And appropriate disposal site management are issues.   |

Source: Survey Team

### (2) Development partner survey results

We extracted sector names and specific quantitative figures that have a large impact on the



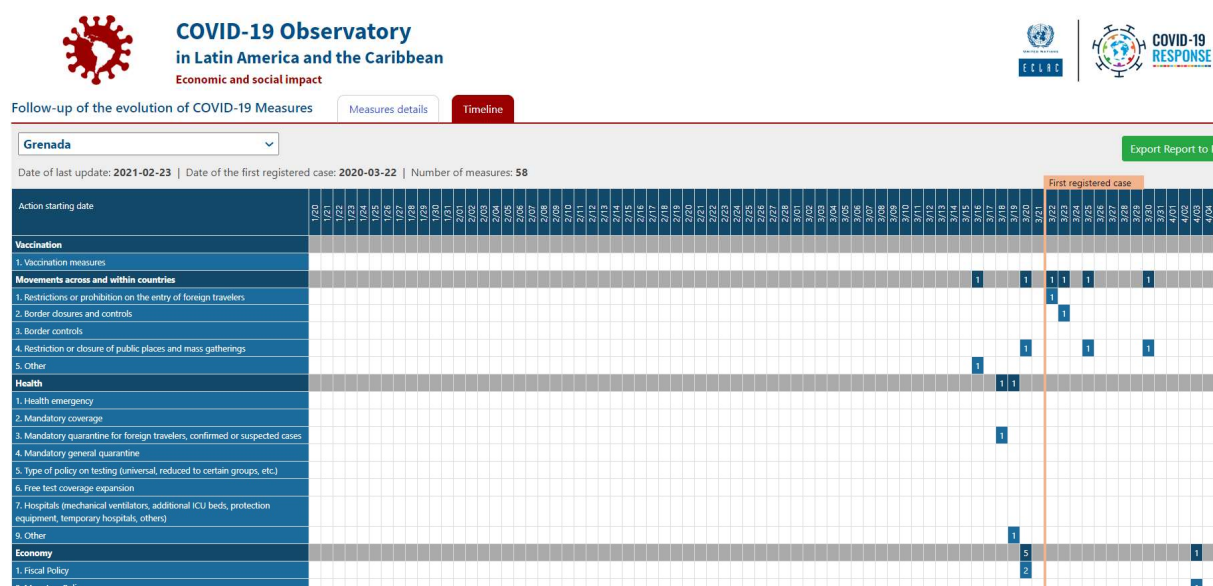
country-specific analysis described in various reports of development partners. Reports from the World Bank, OECD, BCIE, SICA, and the Ministry of Economy, Trade and Industry of Japan suggest the importance of introducing digitalization and innovation (Fintech, Aggrotech, Autotech, etc.), and incorporate the survey results of these development partners. I arranged it accordingly.

World Bank: "Growth and Revitalization" 2021 Semi-Annual Economic Report (March 2021)

- ✓ OECD: COVID-19 in LAC, Regional socio-economic implications and policy priorities (December 2020)
- ✓ BCIE: Impacto Económico del COVID-19 (April 2020)
- ✓ SICA: Estimación del Impacto Económico del COVID-19 en Centroamérica y República Dominicana (April 2020)
- ✓ Ministry of Economy, Trade and Industry of Japan: "Economic and Industrial Policy Based on the Impact of the New Corona Virus" (June 2020), Accelerating Digitization and Onlineization, Gig Economy, Innovation in the Transition to a New Everyday Life 1) Medical care / health, 2) Digital: Infrastructure development premised on the arrival of a digital society, 3) Green: Response to climate change problems, Energy security, 4) Emphasizes resilience.

### 10.1.5 Policies for COVID-19 measures taken by governments of each country

Various policies for COVID-19 taken by the government are described on the ECLAC homepage "COVID-19 Observatory" by country, time series, and field, and can be analyzed.



Source: <https://cepalstat-prod.cepal.org/forms/covid-countrysheet/index.html?table=2&country=GRD>

In this survey, the 18 policies in Grenada listed on this website were classified by sector as much as possible.

#### 1) Infection spread and alleviation of aggravation and death

No material was available.

#### 2) Support for affected industries and people

**Table 10-3 Support for Affected Industries and People (Grenada)**

| Various government policies (COVID-19 Observatory for LAC) |   |  |  |
|--|---|--|--|
| Socioeconomic policy                                       | 7 |  |  |
| Health care & nutrition                                    | 0 |  |  |
| Education  | 1 |  |  |
| Agriculture & rural development                            | 0 |  |  |

| Various government policies (COVID-19 Observatory for LAC) |    |  |  |
|--|----|--|--|
| Private sector   | 6  |  |  |
| Environment & disaster prevention                          | 0  |  |  |
| Governance and social security                             | 1  |  |  |
| DX and innovation  | 0  |  |  |
| Infrastructure & energy                                    | 0  |  |  |
| Tourism  | 0  |  |  |
| PPP  | 0  |  |  |
| Others (b)   | 3  |  |  |
| total  | 18 |  |  |

Source: Survey Team

### 3) Arrangement of various policies for COVID-19 taken by the government

COVID-19 Observatory for Latin America and Caribbean (ECLAC) organized by governments

**Table 10-4 Government-directed COVID-19 Policy Categories (Grenada)**

Follow-up of the evolution of COVID-19 Measures

| Vaccination   | Economy  | Social protection   |
|---|--|---|
| 1. Vaccination measures   | 1. Fiscal Policy   | 1. Cash transfers (new transfers, increase in existing transfers, expansion of cash transfers to new recipients, early disbursement of transfers) |
| <b>Movements across and within countries</b>  | 2. Monetary Policy   | 2. Food transfers / In-kind transfers   |
| 1. Restrictions or prohibition on the entry of foreign travelers  | 3. Business policy   | 3. Guarantee of basic services  |
| 2. Border closures and controls   | 4. Restriction of economic activity (including shops and shopping centers)                             | <b>Education / schools</b>  |
| 3. Border controls  | 5. Price and quantity controls   | 1. Suspension of classes  |
| 4. Restriction or closure of public places and mass gatherings  | 6. Economic Stimulus (includes aggregate value of fiscal measures and separately of credit guarantees) | 2. Provision of tools for distance learning (online platforms, TV, radio, distance-learning materials)  |
| 5. Other  | 7. Regulation of the personal hygiene and cleaning products market                                     | 3. Maintenance of school feeding programme (indicating under which modalities)  |
| <b>Health</b>   | 8. Debt relief and suspension of credit payments (individuals, microentrepreneurs)                     | <b>Gender</b>   |
| 1. Health emergency   | 9. Other   | 1. Gender-based violence against women  |
| 2. Mandatory coverage   | <b>Labor</b>   | 2. Care economy   |
| 3. Mandatory quarantine for foreign travelers, confirmed or suspected cases                                   | 1. Labor Protection  | 3. Employment and income generation   |
| 4. Mandatory general quarantine   | 2. Elective work leave   | 4. Benefits, transfers and other social protection measures   |
| 5. Type of policy on testing (universal, reduced to certain groups, etc.)                                     | 3. Reduction of working hours  | 5. Women's participation in the digital era   |
| 6. Free test coverage expansion   | 4. Prohibition of dismissal from work  | 6. Other  |
| 7. Hospitals (mechanical ventilators, additional ICU beds, protection equipment, temporary hospitals, others) | 5. Other   |   |

Source: Survey Team

## 10.2 Macroeconomic analysis and selection of priority countries

### 10.2.1 Macroeconomic analysis

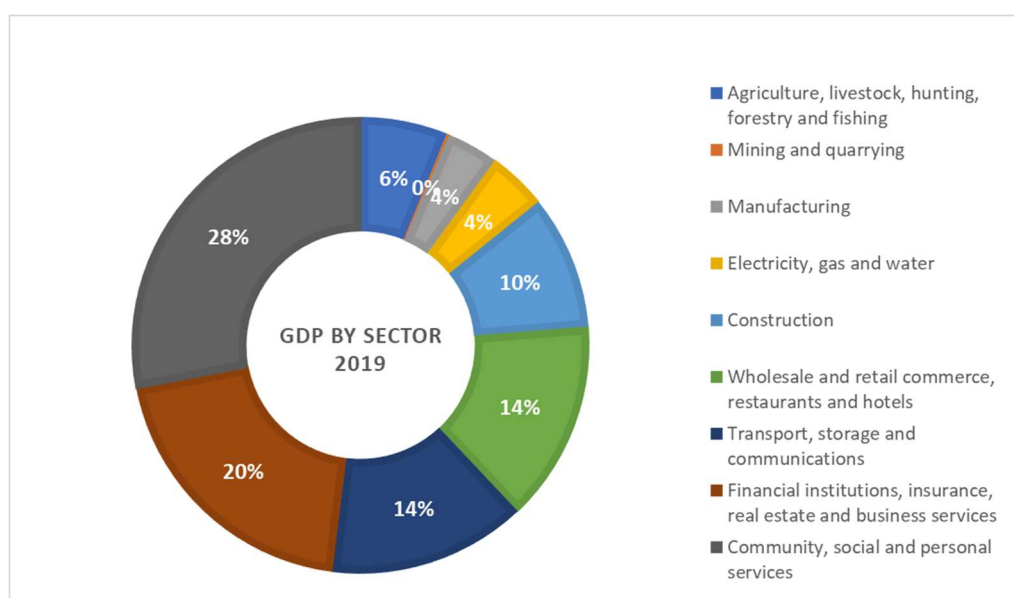
#### (1) Industrial composition

**Table 10-5 Industrial Composition (Grenada)**

Table: GDP by sector (En millones de dólares del Caribe Oriental a precios constantes de 2006)

|  | 2011    | 2012    | 2013    | 2014    | 2015    | 2016    | 2017    | 2018    | 2019a/  | 2020 b/ |
|--|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Agriculture, livestock, hunting, forestry and fishing                | 84.4    | 87.9    | 95.3    | 132.0   | 176.7   | 158.1   | 133.8   | 137.8   | 131.2   | 115.2   |
| Mining and quarrying   | 3.4     | 3.0     | 3.8     | 3.9     | 5.4     | 4.0     | 4.3     | 4.4     | 4.6     | 4.0     |
| Manufacturing  | 60.7    | 60.6    | 59.2    | 60.1    | 62.3    | 65.1    | 66.9    | 73.2    | 78.3    | 62.6    |
| Electricity, gas and water   | 76.6    | 75.4    | 75.5    | 75.9    | 77.6    | 81.9    | 82.7    | 87.2    | 90.0    | 84.4    |
| Construction   | 117.5   | 96.8    | 122.9   | 117.1   | 125.2   | 141.7   | 182.8   | 205.2   | 204.0   | 177.5   |
| Wholesale and retail commerce, restaurants and hotels                | 196.5   | 202.5   | 204.9   | 239.5   | 253.0   | 259.1   | 278.2   | 301.4   | 304.9   | 207.8   |
| Transport, storage and communications                                | 221.2   | 212.5   | 223.0   | 242.4   | 236.8   | 245.9   | 258.4   | 280.3   | 299.9   | 251.3   |
| Financial institutions, insurance, real estate and business services | 359.8   | 361.8   | 359.8   | 366.3   | 385.5   | 396.6   | 406.3   | 418.6   | 427.5   | 424.1   |
| Community, social and personal services                              | 529.1   | 537.7   | 543.9   | 559.1   | 575.4   | 586.9   | 602.9   | 582.2   | 600.3   | 597.9   |
| Total  | 1,649.1 | 1,638.2 | 1,688.2 | 1,796.2 | 1,897.9 | 1,939.3 | 2,016.3 | 2,090.4 | 2,140.7 | 1,924.8 |

Source: ECLAC



Source: Survey Team

## (2) Trends in major economic indicators

**Table 10-6 Trends in Major Economic Indicator (Grenada)**

Table 1 GRANADA: MAIN ECONOMIC INDICATORS (Annual growth rates)

|  | 2011   | 2012   | 2013   | 2014   | 2015   | 2016   | 2017   | 2018   | 2019a/ | 2020 b/ |
|--|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------|
| Gross domestic product (Annual growth rates c/)                                      | 0.8    | -1.2   | 2.4    | 7.3    | 6.4    | 3.7    | 4.4    | 4.1    | 1.9    | -12.6   |
| Per capita gross domestic product (Annual growth rates c/)                           | 0.2    | -1.8   | 1.7    | 6.6    | 5.8    | 3.1    | 3.9    | 3.6    | 1.4    | -13.1   |
| Gross domestic product, by sector (Annual growth rates c/)                           |        |        |        |        |        |        |        |        |        |         |
| Agriculture, livestock, hunting, forestry and fishing                                | -1.6   | 4.1    | 8.4    | 38.6   | 33.9   | -10.5  | -15.4  | 3.0    | 15.9   | -12.2%  |
| Mining and quarrying   | -25.4  | -14.2  | 27.1   | 2.9    | 40.7   | -25.6  | 5.4    | 3.3    | -0.9   | -13.04% |
| Manufacturing  | -0.1   | -0.2   | -2.2   | 1.6    | 3.7    | 4.5    | 2.7    | 9.4    | 4.5    | -20.1%  |
| Electricity, gas and water   | 1.1    | -1.5   | 0.1    | 0.5    | 2.3    | 5.4    | 1.1    | 5.4    | 4.5    | -6.2%   |
| Construction   | -11.8  | -17.6  | 26.9   | -4.7   | 7.0    | 13.1   | 29.1   | 12.2   | -3.0   | -12.99% |
| Wholesale and retail commerce, restaurants and hotels                                | 5.2    | 3.1    | 1.2    | 16.9   | 5.6    | 2.4    | 7.4    | 8.4    | 2.7    | -31.8%  |
| Transport, storage and communications  | -3.2   | -3.9   | 4.9    | 8.7    | -2.3   | 3.8    | 5.1    | 8.5    | 6.9    | -16.2%  |
| Financial institutions, insurance, real estate and business services                 | 1.4    | 0.6    | -0.6   | 1.8    | 5.3    | 2.9    | 2.5    | 3.0    | 2.3    | -0.8%   |
| Community, social and personal services  | 2.1    | 1.6    | 1.2    | 2.8    | 2.9    | 2.0    | 2.7    | -3.4   | 3.6    | -0.4%   |
| Balance of Payments (Millions of dollars)  |        |        |        |        |        |        |        |        |        |         |
| Current account balance  | -207.0 | -193.2 | -221.3 | -105.3 | -124.7 | -117.3 | -162.5 | -186.1 | -115.8 | -178.0  |
| Goods balance  | -258.1 | -257.5 | -278.8 | -259.0 | -263.4 | -269.2 | -328.5 | -365.4 | -382.1 | -307.3  |
| Exports, f.o.b.  | 37.2   | 42.8   | 45.4   | 46.8   | 43.7   | 38.5   | 41.3   | 45.5   | 44.0   | 16.6    |
| Imports, f.o.b.  | 295.3  | 300.3  | 324.2  | 305.8  | 307.1  | 307.7  | 369.9  | 410.9  | 426.1  | 323.9   |
| Services trade balance   | 58.8   | 68.3   | 68.7   | 244.6  | 267.1  | 264.5  | 291.0  | 302.6  | 391.9  |         |
| Income balance   | -31.8  | -34.3  | -29.6  | -82.8  | -116.9 | -97.0  | -121.6 | -113.6 | -114.3 |         |
| Net current transfers  | 24.1   | 30.3   | 18.3   | -8.1   | -11.5  | -15.6  | -3.3   | -9.7   | -11.2  |         |
| Capital and financial balance (Millions of dollars)                                  |        |        |        |        |        |        |        |        |        |         |
| Net foreign direct investment d/   | 42.6   | 31.5   | 113.1  | 100.0  | 137.4  | 93.2   | 152.2  | 165.7  | 122.8  |         |
| Other capital movements d/   | 166.4  | 159.8  | 139.6  | 27.2   | 15.8   | 34.1   | 1.4    | 55.2   | 18.6   |         |
| Foreign remittance from abroad for 2019 and 2020                                     | 177.3  | 157.0  | 223.1  | 44.4   | 36.3   | 30.3   | 31.9   | 107.3  | 27.1   |         |
| Microfinance dispatched and the sectors that received microfinance for 2019 and 2020 |        |        |        |        |        |        |        |        |        |         |

Source: Economic Survey of Latin America and the Caribbean 2020: Main conditioning factors of fiscal and monetary policies in the post-COVID-19 era

### 10.2.2 Impact analysis and identification of key sectors

#### (1) Impact assessment results for each sector by AHP analytic hierarchy process based on economic indicators

**Table 10-7 Results of Sector Impact Analysis by COVID-19 (Grenada)**

| ECLAC category   | Changes around COVID-19 | Trends before COVID-19 | Total GDP ratio of the sector | comprehensive evaluation |   |
|--|-------------------------|------------------------|-------------------------------|--------------------------|---|
| Importance (weight)  | 0.4590                  | 0.0660                 | 0.0750                        |                          |   |
| Agriculture, livestock, hunting, forestry and fishing                | 4                       | 9                      | 4                             | 0.061                    | 6 |
| Mining and quarrying   | 6                       | 1                      | 1                             | 0.064                    | 5 |
| Manufacturing  | 8                       | 5                      | 2                             | 0.092                    | 2 |
| Electricity, gas and water   | 3                       | 3                      | 3                             | 0.0400                   | 7 |
| Construction   | 5                       | 7                      | 5                             | 0.070                    | 4 |
| Wholesale and retail commerce, restaurants and hotels                | 9                       | 8                      | 7                             | 0.115                    | 1 |
| Transport, storage and communications                                | 7                       | 6                      | 6                             | 0.090                    | 3 |
| Financial institutions, insurance, real estate and business services | 2                       | 4                      | 8                             | 0.0396                   | 8 |
| Community, social and personal services                              | 1                       | 2                      | 9                             | 0.028                    | 9 |

Source: Survey Team

#### 1) Amendment of ECLAC sector classification to this sector classification and selection of priority sectors

In line with the method described in the main volume, the Sector Classification is divided into the Vertical Sector and the Cross-Cutting Sector, the ECLAC classification sector is allocated to the Vertical Sector Classification, and the evaluation of various policies related to COVID-19 taken by the

government along with the results of the partner survey and the indicators of the national development cooperation policy, the ranking of priority sectors are calculated using the four indicators, which are described in the table below.

**Table 10-8 Ranking of Priority Sectors (Grenada)**

|                                   | Economic Indicator Analysis | Government Policy on COVID-19 | Survey on COVID-19 by Development Partners | Country Development Cooperation Policy | Base Case |   | Priority |
|-----------------------------------|-----------------------------|-------------------------------|--|--|-----------|---|----------|
| Importance (weight)               | 0.6000                      | 0.2000                        | 0.1000                                     | 0.1000                                 |           |   |          |
| Social and Economic Policy        | 0.0000                      | 0.0778                        | 0.0000                                     | 0.0000                                 | 0.0778    |   | ○        |
| Health and Nutrition              | 0.0234                      | 0.0000                        | 0.0000                                     | 0.0000                                 | 0.0234    | 6 |          |
| Education                         | 0.0144                      | 0.0111                        | 0.0000                                     | 0.0000                                 | 0.0255    | 5 |          |
| Agriculture and Rural Development | 0.0779                      | 0.0000                        | 0.0125                                     | 0.0167                                 | 0.1070    | 4 |          |
| Manufacturing                     | 0.1897                      | 0.0667                        | 0.0125                                     | 0.0167                                 | 0.2856    | 1 | ○        |
| Environment/ Disaster Management  | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0333                                 | 0.0333    |   | ○        |
| Governance and Security           | 0.0000                      | 0.0111                        | 0.0000                                     | 0.0000                                 | 0.0111    |   | ○        |
| DX Innovation                     | 0.0000                      | 0.0000                        | 0.0375                                     | 0.0000                                 | 0.0375    |   | ○        |
| Infrastructure and Every          | 0.2201                      | 0.0000                        | 0.0125                                     | 0.0167                                 | 0.2492    | 2 | ○        |
| Tourism                           | 0.0745                      | 0.0000                        | 0.0250                                     | 0.0167                                 | 0.1162    | 3 | ○        |
| Public-Private Partnership        | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0000                                 | 0.0000    |   | ○        |

Source: Survey Team

## (2) Sensitivity analysis

### 1) Analysis case settings

Based on the above methodology, the following case settings were made.

**Table 10-9 Sensitivity Analysis Case-based Weighting Settings (Grenada)**

|  | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|--|-----------|------------------------|------------------------|------------------------|
| Economic indicator analysis  | 0.6       | 0.6                    | 0.5                    | 0.5                    |
| Investigation and arrangement of various policies for COVID-19 taken by the government | 0.2       | 0.1                    | 0.1                    | 0.1                    |
| Development partner survey results   | 0.1       | 0.2                    | 0.2                    | 0.3                    |
| Country-specific development cooperation policy  | 0.1       | 0.1                    | 0.2                    | 0.1                    |

Source: Survey Team

### 2) Summary of sensitivity analysis

The results of each sensitivity analysis are as summarized below. Sensitivity analysis did not show much change, which was close to the result of the base case.

**Table 10-10 Summary of Sensitivity Analysis Results (Grenada)**

|                                   | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|-----------------------------------|-----------|------------------------|------------------------|------------------------|
| Social and economic policy        |           |                        |                        |                        |
| Health care / nutrition           | 6         | 5                      | 5                      | 5                      |
| education                         | 5         | 6                      | 6                      | 6                      |
| Agriculture / rural development   | 4         | 4                      | 4                      | 4                      |
| Manufacturing industry            | 1         | 1                      | 1                      | 1                      |
| Environment / disaster prevention |           |                        |                        |                        |
| Governance and citizen security   |           |                        |                        |                        |
| DX / Innovation                   |           |                        |                        |                        |
| Infrastructure and Energy         | 2         | 2                      | 2                      | 2                      |
| sightseeing                       | 3         | 3                      | 3                      | 3                      |
| Public-private partnership        |           |                        |                        |                        |

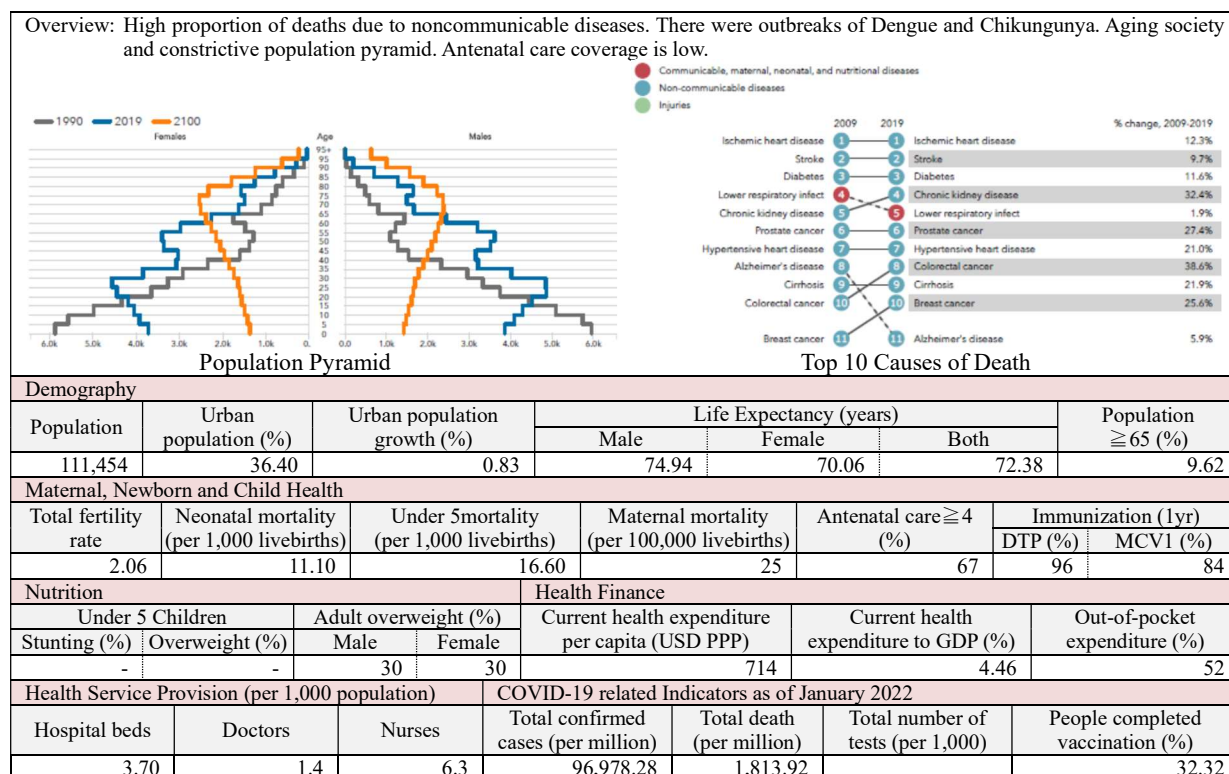
Source: Survey Team

### **(3) Selection of priority sectors by country**

From the above results, 1) social / economic policy, 2) manufacturing industry, 3) environment / disaster prevention, 4) governance / citizen security, 5) DX / innovation, 6) infrastructure / energy, 7) tourism, 8) public-private partnership are selected as priority sectors.

## 10.3 Country-specific information by sector

### 10.3.1 Health care / nutrition



Source: Graphs=Institute for Health Metrics and Evaluation, County Profile; Demography, Total fertility rate, Neonatal mortality, under-5 mortality, Health finance= World Development Indicators, the World Bank (Accessed on Aug 2021); Maternal mortality= UNICEF (Sep 2019); Antenatal care, Immunization, Nutrition, Health service provision,= OECD/The World Bank (2020), Health at a Glance: Latin America and the Caribbean 2020; COVID-19 related indicators= Our World in Data (Accessed on Jan 2022)

| Health                                  |  |
|---|--|
| Leadership/ Governance                  | Responsible Agency: Ministry of Health, Social Security and International Business<br><a href="https://gov.gd/moh/">https://gov.gd/moh/</a><br>Centralized<br>Major Relevant Policies: Strategic Plan for Health 2016-2025 |
| Service Providing System                | Public sector is the main provider. Primary level facilities are located every 3 miles, 36 in in total. Advanced medicine should be sought overseas with own expenses.   |
| Health Finance                          | Government fund/ National health insurance is under consideration.   |
| Human Resource for Health               | Qualified health workers are adequately distributed.   |
| IT/ Digital Health                      | IT has been introduced in pilot hospitals. Registrations and certificates, as well as health campaign are available through e-government.  |
| Drugs/ Medical Equipment                | MOH maintain medical equipment inventory. Procurement is centralized, but compliance with the guidelines is not sufficient.  |
| Priority                                | Noncommunicable disease prevention and control   |
| Communicable Disease Emergency Response | To meet IHR requirements, capacity strengthen preparedness and response to health emergency, especially chemical and radiation emergency with target year of 2018.   |
| Major Development Partners              | PAHO/WHO, Caribbean Development Bank Basic Need Program (BNTF), CARPHA (surveillance, laboratory capacity, etc.), Global Fund, medical missions from Cuba and China  |
| Nutrition                               |  |
| Institutional Arrangement               | Ministry of Agriculture  |
| Major Relevant Policies                 | Food and Nutrition Security Policy and Plan of Action, 2013  |
| Human Resource for Health               | Nutrition related degrees: No<br>Nutrition related subjects in pre-service education: No<br>Number of nutrition related professionals: 5.6 per 100,000 population  |

Source: WHO Country Cooperation Strategy for Grenada at a glance, May 2016, Institute for Health Metrics and Evaluation, County Profile, WHO, Global atlas of medical devices, 2017, Government of Grenada website (<https://gov.gd/moh/ministry-services>), and WHO, Nutrition Landscape Information System (NLIS)



### 10.3.2 Education

| Overview  |   |   |               |                 |                 |
|---|---|---|---------------|-----------------|-----------------|
| Number of children  | Education level   | Preschool   | primary       | Lower secondary | Upper secondary |
|   | 2018  | 3,698 people  | 13,195 people | 5,605 people    | 3,530 people    |
| Source: Institute for Statistics (UIS), UNESCO Bureau of Statistics |   |   |               |                 |                 |
| Government authority  | Ministry of Education, Human Resource Development, Religious Affairs and Information  |   |               |                 |                 |
| Education indicator   | Net enrollment rate: primary education 99.2%, upper secondary 96.8% (2018)<br>Primary education completion rate 123.0% (2018), out-of-school children rate 0.8% (2018), public education budget GDP ratio 3.2% (2017) Source: UISs  |   |               |                 |                 |
| Impact of COVID-19  |   |   |               |                 |                 |
| School closure / reopening  | According to UNICEF, 60 days were completely closed and 65 days were partially closed between March 11, 2020 and February 2, 2021.  |   |               |                 |                 |
| COVID-19 measures   | Adopted "Education Sector Measures / Strategy" formulated by the Organization of Eastern Caribbean States (OECS).<br>"OECS Education Sector Response and Recovery Strategy to COVID-19"<br>Providing electronic devices for teachers and students, psychosocial support, providing meals for disadvantaged students, activities to meet the psychosocial needs of teachers, creating videos explaining the current situation for special needs students, Elimination of digital divide, etc.  |   |               |                 |                 |
| Distance education  | Implementation status   | As an alternative to the lessons conducted during the school closure period, introduced the site of a learning virtual platform of a private company to students. There is no other information, and it is unclear whether online learning and class distribution via TV and radio are being carried out. |               |                 |                 |
|   | Access  | Internet access rate for educational purposes in schools: 72.15% for primary school, 100% for lower and upper secondary school (UNESCO)   |               |                 |                 |
|   | Teacher training  | N / A   |               |                 |                 |
| School hygiene  | Infection control measures  | The safety guide for reopening school is prepared by UNICEF.  |               |                 |                 |
|   | Facility maintenance  | According to a survey conducted by the World Health Organization (WHO) and UNICEF, almost 100% of schools have basic water and hand-washing facilities.   |               |                 |                 |
| School lunch / nutrition  | N / A   |   |               |                 |                 |
| Countermeasures for vulnerable people                               | N / A   |   |               |                 |                 |
| Support for donors, etc.  | UNICEF: US \$ 3 million Grant Aid (Dominica, Grenada, St. Lucia, St. Vincent) COVID-19 Education policy and effective countermeasures in the disaster, distance education platform for vulnerable children, distribution of digital teaching materials, Development of online learning content for radio and TV education programs, collaboration with the private sector to improve access to primary and secondary education level by learning platforms, teacher training for distance learning technology acquisition, hygiene in schools in vulnerable areas and Infrastructure development<br>GPE: Distribution of tablets to vulnerable children for COVID-19 countermeasures (GPE grant US \$ 70,000) |   |               |                 |                 |

Source: Survey Team

### 10.3.3 Agriculture / rural development

|   |  |      |      |
|---|--|------|------|
| Urban / rural population ratio                | 36.3% / 63.7% (FAOSTAT 2018)                                       |      |      |
| Agricultural land area                        | 8,000 ha (FAOSTAT 2019) 1)   |      |      |
| Agricultural sector employment                | 13.8% of total employment (CARICOM 1998) 2)                        |      |      |
| Agricultural GDP                              | 4.9% of total GDP (World Bank 2020)                                |      |      |
| Of the agricultural sector Value added amount | \$ 48,257.61 1,000 (including forestry) (World Bank 2020) 3)       |      |      |
| Agricultural sector expenditure ratio         | Ratio of agricultural fiscal expenditure to national budget (%) 4) |      |      |
|   | 2018   | 2019 | 2020 |
|   | 1.61   | 1.30 | 2.85 |

|   |   |         |         |         |         |         |
|---|---|---------|---------|---------|---------|---------|
| Of the agricultural sector<br>Export-import balance | Trade Balance (USD1,000 FAOSTAT 5)  |         |         |         |         |         |
|   |   | 2015    | 2016    | 2017    | 2018    | 2019    |
|   | export  | 19,349  | 15,732  | 17,440  | 17,825  | 16,749  |
|   | Import  | 77,005  | 58,436  | 69,876  | 64,704  | 65,398  |
|   | Balance of payments   | -57,656 | -42,704 | -52,436 | -46,879 | -48,649 |
| Agricultural development Policy / plan / strategy   | <p>The government of the country has formulated the "National Agricultural Plan 2015-20306)". The plan is "internationally competitive, contributing to economic growth, strengthening national food and nutrition security, poverty alleviation and social welfare, and conservation of the natural environment, in line with nationally beneficial regions and international agricultural policies and strategies. With a vision of "building an agricultural sector," a well-coordinated planning and implementation framework that is mutually effective, with full participation of stakeholders, and can promote food security, income generation and poverty alleviation. The goal is to stimulate economic growth in the agricultural sector through development. Strategic key points for achieving this are: "Increasing the contribution of the agricultural sector to national economic growth, job creation, poverty reduction and rural development (increasing exports of traditional products to international and regional markets / in the domestic market) Increased sales of fruits, vegetables, root vegetables, herbs, and spices / strengthening cooperation between agriculture and tourism, etc.) ", "Strengthening national food security "(increasing use of local fresh and processed products / economical food for the vulnerable Improve access capacity / promote consumption of nutritious and safe food) ", "Strengthen resilience to climate change and natural disasters in the agricultural sector, reduce the impact of disasters and climate change (on environmental and biodiversity) Avoiding / preventing / minimizing impacts / Strengthening preparedness and response capabilities to climate change and abnormal weather / Conservation and optimization of resources (land / sea / genetics), etc.), "Infrastructure, physical resources, research and development, institutions, people Investment for capacity development of agricultural resources (economic infrastructure of agricultural sector, investment in institutional and human resource capacity development, agricultural research and development, etc.), "Reciprocal partnership with regional counterparts and development partners (more) Realization of large agricultural products / regional / international trade cooperation / establishment of coordination framework with development partners, etc.) "</p> <p>The Caribbean Agricultural Research and Development Institute (CARDI), of which Grenada is a member, is a research and development institute that aims to improve the competitiveness and sustainability of the regional agricultural sector, and was established in 1974 by 12 member countries of CARICOM. Was done. To transform the agricultural sector into a modernized, competitive, innovative and resilient one, CARDI has created a five-year roadmap, Strategic Plan 2018-20227). CARDI divides its member countries into three groups based on the economic structure of each country, and Grenada is the third group. This group is an OECS country and R &amp; D is heavily dependent on CARDI. Countries with high food security risks need to increase their food production as much as possible. On the other hand, many farmers are small and have problems due to the large number of steep terrain. The biggest threat to these smallholders is meteorological problems such as drought and excessive rainfall, which need to be addressed.</p> |         |         |         |         |         |
| Impact of COVID-19                                  | <p>According to the "Analysis of Agriculture and Fisheries in the First Half of 2021 8)" conducted by the Ministry of Finance of the country, there was a shortage of agricultural input materials such as seeds and pesticides at the same time. This is due to the increase in transportation costs in the international market. This cost increase ultimately led to higher selling prices to consumers. For example, in the case of fresh food in supermarkets, prices have increased by more than 30% on average, and in street sales and in the market, prices have increased by 10 to 30%. In the case of poultry farming, where feed accounts for 60% of production costs, soaring feed prices have created even more fierce competition with imported eggs and chicken.</p> <p>Under the above circumstances, the importance of food security was reaffirmed, as the Ministry of Agriculture prepared the "COVID-19 Mitigation and Response Plan" 9) in collaboration with other related organizations. The main results required by this plan are "sustainable supply of fresh food and agricultural products", "formulation and implementation of agricultural product price policy", "reduction of food import value", and "creation of short-term employment during the implementation period of the plan". And "Building a framework for information gathering and sharing between sector and stakeholders."</p>  |         |         |         |         |         |
| Source / reference                                  | <p>1) FAOSTAT-Land, Input and Sustainability-Land Use-Area-Agriculture (<a href="https://www.fao.org/faostat/en/#data/RL">https://www.fao.org/faostat/en/#data/RL</a>)<br/> 2) (<a href="https://statistics.caricom.org/Files/Publications/LABOUR%20FORCE/GRENADA.pdf">https://statistics.caricom.org/Files/Publications/LABOUR%20FORCE/GRENADA.pdf</a>)<br/> 3) Agriculture, forestry, and fishing, value added (constant 2015 US \$) --Latin America &amp; Caribbean (<a href="https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart">https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart</a>)<br/> 4) FAOSTAT-Government Expenditure-Share of Total Expenditure-Central Government (<a href="https://www.fao.org/faostat/en/#data/LG">https://www.fao.org/faostat/en/#data/LG</a>)<br/> 5) FAOSTAT-Trade-Crops and livestock products-Import / Export Value-Agricultural Products (<a href="https://www.fao.org/faostat/en/#data/TCL">https://www.fao.org/faostat/en/#data/TCL</a>)<br/> 6) National Agricultural Plan 2015-2030 (<a href="http://extwprlegs1.fao.org/docs/pdf/gm171435.pdf">http://extwprlegs1.fao.org/docs/pdf/gm171435.pdf</a>)<br/> 7) CARDI Strategic Plan 2018-2022 (<a href="http://www.cardi.org/wp-content/uploads/downloads/2018/05/CARDI-Strategic-Plan-2018-to-2022-Final.pdf">http://www.cardi.org/wp-content/uploads/downloads/2018/05/CARDI-Strategic-Plan-2018-to-2022-Final.pdf</a>)<br/> 8) GRENADA, 2021, Media Institute of the Caribbean (<a href="https://www.mediainstituteofthecaribbean.com/grenada">https://www.mediainstituteofthecaribbean.com/grenada</a>)<br/> 9) Ministry of Agriculture formulates Mitigation and Response Plan amidst Coronavirus Pandemic (<a href="https://gov.gd/index.php/ministry-agriculture-formulates-mitigation-and-response-plan-amidst-coronavirus-pandemic">https://gov.gd/index.php/ministry-agriculture-formulates-mitigation-and-response-plan-amidst-coronavirus-pandemic</a>)</p>  |         |         |         |         |         |

### 10.3.4 Private sector

Grenada is a country with a small economy (20th) but a slightly higher GDP per capita (8th). Although the latest data are not available, the unemployment rate is very high, especially the youth unemployment rate is over 50%.

|              | Index                      | Value | Ranking                 | Year | Source     |
|--------------|----------------------------|-------|-------------------------|------|------------|
| Productivity | GDP per capita (USD)       | 9,680 | 8 (Among 22 countries)  | 2020 | World Bank |
|              | GDP per worker (USD)       | —     | — (Among 18 countries)  | —    | —          |
| Employment   | Minimum wage (USD / month) | 259   | 12 (Among 23 countries) | 2019 | ILO        |
|              | Unemployment rate          | 23.6  | 22 (Among 22 countries) | 2017 | ILO        |
|              | Female unemployment rate   | 26.8  | 22 (Among 22 countries) | 2017 | ILO        |
|              | Youth unemployment rate    | 50.3  | 22 (Among 22 countries) | 2017 | ILO        |
|              | Underemployment rate       | —     | — (Among 18 countries)  | —    | —          |
|              | Informal worker rate       | —     | — (Among 12 countries)  | —    | —          |

Source: Described in the table



Source: World Bank, ILO, The Global Economy, etc.

### 10.3.5 Environment / disaster prevention

|             | item                        | data   | remarks                           |
|-------------|-----------------------------|--|-----------------------------------|
| environment | Environmental agency        | Ministry of Climate Resilience, The Environment, Forestry, Fisheries & Disaster Management |                                   |
|             | Waste-related organizations | Grenada Solid Waste Management Authority   |                                   |
|             | Environmental Budget (USD)  | 2019: 8,303,210<br>2020: 4,786,370<br>2021: 4,848,452<br>Three-year average:<br>5,979,344  | Average: 11th out of 23 countries |

|                     |  |   |                                  |
|---------------------|--|---|----------------------------------|
|                     | Environmental budget per capita (2019-2021 average, USD) | 52.9  | 3rd out of 23 countries          |
|                     | Budget ratio to national budget (2019)                   | 2.39%   | 2nd out of 23 countries          |
|                     | Donor support status                                     | 3 cases   | As of May 2021                   |
|                     | Renewable energy power generation (GWh) (2019)           | Four  | IRENA, 2021                      |
|                     | Geothermal power generation capacity (MWe)               | 2020: 0<br>2025 Forecast: 0<br>Potential: 7.00          | WGC, 2020                        |
| Disaster prevention | Disaster prevention organization                         | National Disaster Management Agency (NaDMA)             |                                  |
|                     | Donor support status                                     | 2 cases   | As of May 2021                   |
|                     | Number of natural disasters (2010-2020)                  | Major disasters: Floods, droughts other than landslides | (Statistical data not available) |
|                     | Number of victims (persons) per 100,000 population       | —   | (Statistical data not available) |

Source: Survey Team

### 10.3.6 Governance and citizen security

| Item                                    | Overview  |
|---|---|
| Political system                        | Parliamentary democracy under the constitutional monarchy belonging to the Commonwealth of Nations  |
| Election system                         | Free and regular elections are held.<br>The monarch is hereditary. The governor-general appointed by the monarch appoints the head of a majority party or coalition government as prime minister after the legislative elections. |
| Legislative system                      | Bicameral parliament  |
| Most recent / next legislative election | Senate: April 27, 2018 (next time scheduled for 2023 at the latest)<br>House of Representatives: March 13, 2018 (Next time is scheduled for 2023 at the latest)   |
| Appointment of judicial system / judge  | The President of the Eastern Caribbean Supreme Court is appointed by the Queen of England. Other judges and judges are appointed by the Judicial Legal Services Committee and the Independent Judiciary.                          |
| Political stability                     | Gradually improved over the last 10 years   |

|                                   |  |   |
|-----------------------------------|--|---|
| “Worldwide Governance Indicators” | <p>Performance is around the average of the region. Looking at trends since 2000, the level of "government effectiveness" and "regulatory quality" has declined.</p> |   |
|                                   | Global freedom status  | 89/100 points (citizen rights: 37/40 points, political rights: 52/60 points)<br>Classified as "free country" (Freedom House 2021)   |
|                                   | Corruption Perception Index (CPI)  | 52/180th place, 53/100 points (Transparency International 2020)   |
|                                   | E-government development index   | The average level of the area. In particular, it ranks first in the Caribbean in terms of human capital. A Digital National ID issued.  |
|                                   | Rule of law  | According to WGI, the level of "regulatory quality" has deteriorated significantly in the last decade, and the level of "rule of law" is above the regional average.            |
|                                   | Citizen security   | The homicide rate is high compared to the Caribbean level. The homicide rate in 2017 was 10.8 / 100,000 (14 in the Caribbean and 6 in the world in the same year) (UNODC 2021). |

Source: Survey Team

### 10.3.7 DX / Innovation

|   |  |  |
|---|--|--|
| Basic indicators and statistics   | E-Government Ranking 1): 102nd                                   | <p>Radar chart of e-government ranking</p> |
|   | Mobile connection index 2):-                                     |  |
|   | Network Infrastructure Index:-                                   |  |
|   | Internet user rate 59.1  |  |
|   | Mobile connection rate 116.7                                     |  |
|   | Fixed broadband rate 22.8  |  |
|   | Rate of increase in the number of Internet users 0.5 (2021/2020) |  |
| Communication network   |  |  |
| <p>Grenada's fixed-line penetration 3) 20.2% (2018) and broadband penetration 4) 22.8% (2019) have consistently exceeded the Latin American and Caribbean averages (16.1% and 14.0%, respectively) since the service was introduced. Steady growth has been seen, and the improvement in the mobile penetration rate 5) shows growth equivalent to the regional average.</p> <p>The transportation, storage and telecommunications sector accounts for 10.5% of GDP (2013), which is the second largest after education (19.8%), real estate, leasing and business activities (11.5%) 6).</p> |  |  |

The Telecommunications Regulatory Commission (NTRC) 7) was established in accordance with the Telecommunications Act 31 enacted in 2000 and Protocol act-30 with the Telecommunications Bureau of the East Caribbean (ECTEL), and in collaboration with ECTEL, Grenada's Freedom. It is an organization that regulates the liberalized telecommunications market.

The telecommunications sector has been liberalized with the establishment of NTRC, but the mobile market is now Flow (formerly LIME: Cable & Wireless) and Digicel, including the acquisition of Grenada Wireless Holdings Ltd (AT & T) by Digicel in 20048). It is divided into 2 minutes and is in an oligopolistic state 9). However, the local company brand Spice Mobile (AisleCom) 10) has also entered the market, which is small but has operators who can quickly respond to needs such as introducing the first 4G / LTE service in Japan.

#### National Strategy for Digital Transformation

The National Sustainable Development Plan 2020-2035 (NSDP) 11) states that (1) advanced human social development, (2) infrastructure development that is resistant to climate and natural disasters, and a vibrant, dynamic and competitive economy. We have set three achievement goals: formation, (3) environmentally friendly sustainability and a safe society. The country's digital development is essential for economic growth, inclusiveness, job creation and service delivery, and strategic actions for digital transformation are mapped to the second goal.

Grenada is also promoting the World Bank (WB) financing project CARCI P12) to increase access to broadband networks in the Caribbean and promote the development of the ICT service industry in the Caribbean, as part of 2012. With a loan amount of 10 USD million, CARIFORUM13) strengthens public-private partnerships and integrated administrative networks (Gwan) within the region, submarine cable infrastructure, land communications offices, domestic backbone networks, border links, and IXP (Internet Exchange Points). ), Etc., and are implementing projects aimed at bridging the mutual gaps in regional and domestic broadband communication infrastructure.

In 2019, with a loan from WB, the DG4R Program 14) (15 USD million) was implemented with the aim of improving the government's digital services and strengthening system resilience, and the construction of a national certification system and tax payment system is in progress. In addition, in order to promote the national transformation of DX, the Caribbean DX Project 15) (8 USD million) is working on the establishment of cyber security organizations, private digital technology introduction promotion programs, capacity development programs, etc.

#### Characteristic efforts

Aiming for economic growth and development by leveraging technology, innovation and human capital in collaboration with the United Nations Development Program (UNDP) amid economic turmoil and a major blow to the tourism industry, which is the main industry under the COVID-19 situation. The vision "Smart State Grenada (SSG) 16)" has been launched. In addition to aiming to improve productivity by utilizing existing fields such as tourism, government administration, commerce, education, and agriculture, important new developments such as financial services, creative art, digital media, IT development, and medical research There are efforts to create opportunities for In particular, there is a project called Green / Blue Economy 16), 17) that integrates digital technology in the sector that leverages Grenada's strengths through natural resources such as agriculture, marine environment, and tourism. For example, in the agricultural sector, we have combined agricultural 4.0 deployment plans that incorporate sensors, devices, high-productivity machines, information technology, robots, drones, GIS, GPS, etc., and in the marine environment sector, we have combined artificial intelligence (AI) and machine learning algorithms. With digital technology, we are looking at effective use of data and information on the reproduction of neighboring marine and wildlife populations.

#### source

43. E-Gov-Index: a composite indicator that consists of three indexes (Online Service Index, Telecommunication Infrastructure Index and Human Capital Index), which are equally weighted. It ranges from 0 to 1, with 1 being the most developed.
44. Mobile Connectivity Index: an input index developed by GSMA to measure the performance against the four key enablers of mobile internet adoption – infrastructure, affordability, consumer readiness and content. (<https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2016/06/Mobile-Connectivity-Launch-Report.pdf>)
45. Fixed telephone subscriptions (per 100 people) --Latin America & Caribbean, Grenada  
<https://data.worldbank.org/indicator/IT.MLT.MAIN.P2?locations=ZJ-GD>
46. Fixed broadband subscriptions (per 100 people) --Latin America & Caribbean, Grenada  
<https://data.worldbank.org/indicator/IT.NET.BBND.P2?locations=ZJ-GD>
47. Mobile cellular subscriptions (per 100 people) --Latin America & Caribbean, Grenada  
<https://data.worldbank.org/indicator/IT.CEL.SETS.P2?locations=ZJ-GD>
48. Contribution to GDP by industry in Grenada, 2013  
<https://gov.gd/mof/statistics>
49. <https://ntrc.gd/about-ntrc/>
50. Caribbean Regional Communications Infrastructure Program  
<http://carcip.gov.vc/carcip/images/PDF/Downloads/finalreportbroadbandfeasibilitystudy.pdf>
51. Airtime API for Digicel and Flow in Grenada  
<https://operators.reloadly.com/digicel-flow-grenada-airtime-api/>
52. <https://spicemobile.gd/about-us.html>
53. National Sustainable Development Plan 2020-2035 Grenada  
<http://observatorioplanificacion.cepal.org/sites/default/files/plan/files/Dominica%202030The%20National%20Resilience%20Development%20Strategy.pdf>
54. <https://ctu.int/caribbean-regional-communications-infrastructure-project/>
55. <https://caricom.org/tag/cariforum/>
56. DIGITAL GOVERNMENT FOR RESILIENCE PROJECT  
<https://documents1.worldbank.org/curated/en/370621567389621226/pdf/Grenada-Digital-Government-for-Resilience-Project.pdf>
57. Caribbean Digital Transformation Project  
<https://documents1.worldbank.org/curated/en/848701593136915061/pdf/Dominica-Grenada-St-Lucia-St-Vincent-and-the-Grenadines-and-the-Organization-of-Eastern-Caribbean-States- Caribbean-Digital-Transformation-Project-Digital-Caribbean.pdf>
58. GRENADA SMART SMALL STATE Developing the Vision  
[https://www.bb.undp.org/content/barbados/en/home/library/undp\\_publications/grenada-smart-small-state--developing-the-vision-.html](https://www.bb.undp.org/content/barbados/en/home/library/undp_publications/grenada-smart-small-state--developing-the-vision-.html)
59. Transitioning Toward a Blue Economy in Grenada and Other Eastern Caribbean States  
<https://www.worldbank.org/en/results/2018/05/08/transitioning-toward-a-blue-economy-in-grenada-and-other-eastern-caribbean-states>



### 10.3.8 Infrastructure and Energy

| Transport                                 |   |
|---|---|
| Overview                                  | Inland transportation is mainly by car<br>The main public transportation is buses and taxis. There are several domestic air routes between the islands. |
| Leadership governance                     | Ministry of Infrastructure Development, Transport, Public Utilities and Implementation  |
| Major development partners                | No information  |
| Energy and electricity                    |   |
| Overview                                  | The energy self-sufficiency rate in 2016 is 8%. Imported diesel will account for 98.5% of the electricity energy mix in 2020.                           |
| Carbon neutral national plan              | National Plan for Sustainable Development 2020-2035 Grenada<br>Target: 45% reduction in emissions by 2035   |
| Leadership governance and utility company | Ministry for Finance, Economic Development, Physical Development and Energy<br>Grenada Electricity Services Ltd. (GRENLEC)                              |
| Major development partners                | JICA / UNDP / IADB / GIZ  |

Source: JICA Study Team with reference to various websites of the government organization and international organization (WB / IEA / IRENA / US DOE).

### 10.3.9 Tourism

Highest dependency on tourism among the 23 countries surveyed

|  |  |   |
|--|--|---|
| Number of international tourist arrivals (2019)              |  | 188,000   |
| International Tourism Receipts (2019)                        |  | USD 170 million   |
| Tourism Competitiveness Ranking (2019)                       |  | N / A   |
| Tourism Dependency Index (2019)                              |  | 58.5 (4th out of 166 countries)   |
| Government of Japan policy                                   | Number of JICA projects in the last 10 years   | none  |
|  | References to the Country Assistance Policy  | none  |
|  | Interest in pilot projects   | N / A   |
| Tourism industry vulnerability                               | Contribution of Travel & Tourism to GDP (2019)   | 40.5% (4th out of 23 countries)   |
|  | Contribution of Travel & Tourism to employment (2019)  | 42.9% (6th out of 23 countries)   |
|  | Ratio of international spending (2019)   | 96% (1st out of 23 countries)   |
|  | Top 3 nationalities of visitors (2019)   | USA (38.20%)<br>UK (13.82%)<br>Trinidad and Tobago (10.47%)   |
| Importance of tourism  | Ratio of the budget amount of tourism-related ministries to the national budget amount (2019)            | 2.3% (7th out of 16 countries)<br>National budget: XCD 937,566,150<br>Budget of tourism-related ministries: XCD 21,300,462  |
|  | Whether or not it is mentioned as a priority sector in the National Economic and Social Development Plan | Yes<br>Plan name: National Sustainable Development Plan 2020-2035<br>Reference example: 3.2 Goal # 2: Vibrant, Dynamic, Competitive Economy with Supporting Climate-and-Disaster Resilient Infrastructure 3.2.1.2 Sustainable Tourism (p. 61) |
|  | Existence of effective national tourism policies / strategies / plans                                    | none  |
| Impact of COVID-19   | Changes in the contribution of Travel & Tourism to GDP (2019 → 2020)                                     | -65.5% (7th out of 23 countries)  |
|  | Changes in the contribution of Travel & Tourism to employment (2019 → 2020)                              | -33.0% (2nd out of 23 countries)  |
| Number of government support measures for the tourism sector |  | N / A   |

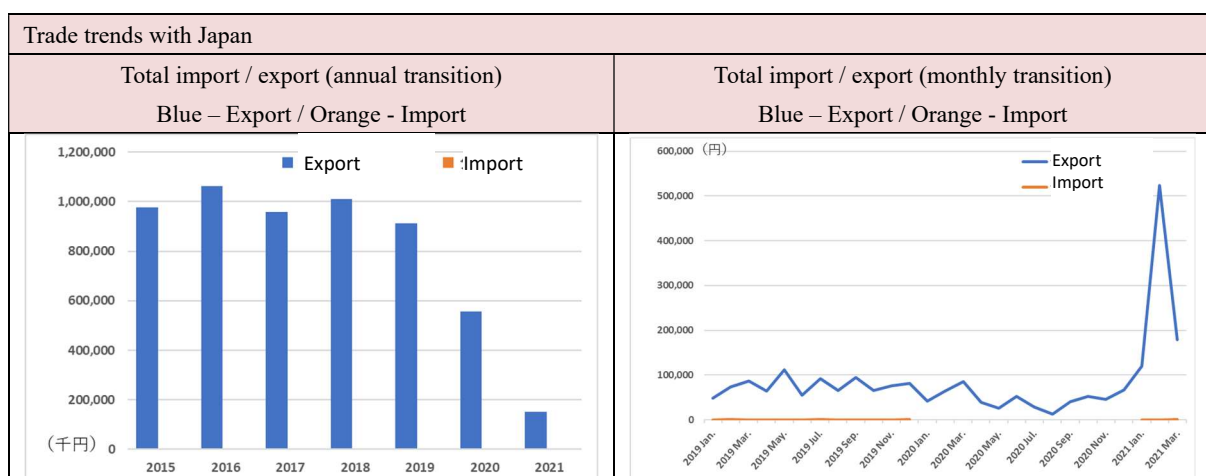
Source: Survey Team

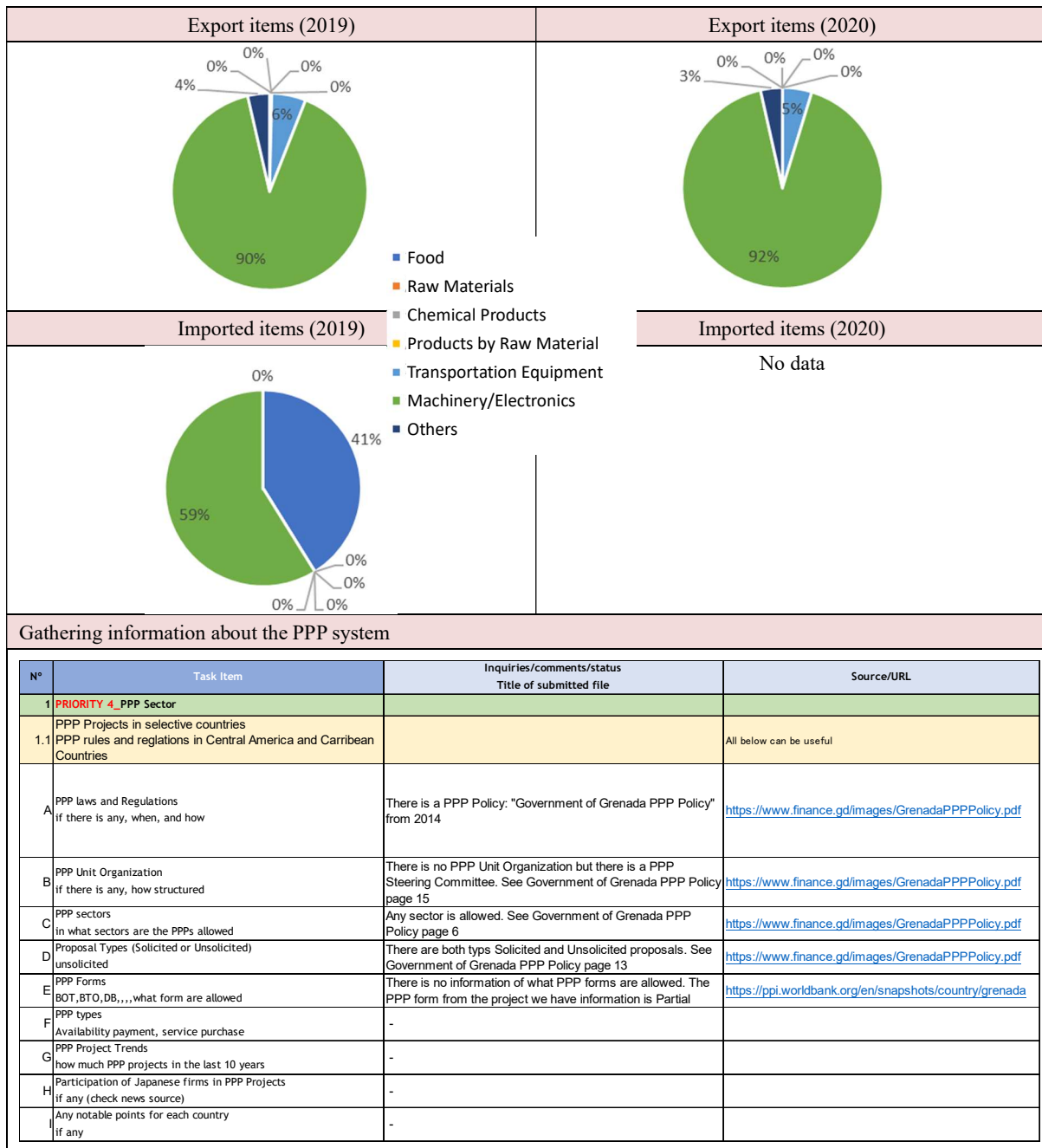
### 10.3.10 Public-private partnership

|  | item   | Contents |
|--|--|----------|
| No. of JICA Public-Private Partnership Projects (After 2012) | Cooperation preparatory survey (overseas investment and financing) (former PPP infrastructure project) | 0 cases  |
|  | Overseas investment and loan   | 0 cases  |
|  | SME Partnership Promotion Survey (support for Small-sized Enterprise)                                  | 0 cases  |



|  |  |             |
|--|--|-------------|
|  | SDGs Business Model Formulation Survey with the Private Sector (support for small- and medium- sized enterprise) | 0 cases     |
|  | SDGs Business Verification Survey with Private Sector (support for small- and medium- sized enterprise)          | 0 cases     |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for large enterprise)                    | 0 cases     |
|  | SDGs Business Verification Survey with Private Sector (support for large enterprise)                             | 0 cases     |
| Total number of Japanese private companies entering the market (2019 survey) | Total number of business locations   | 0 companies |
|  | Overseas branches of Japanese companies,   | 0 companies |
|  | Local corporations wholly owned by Japanese companies and their branches   | 0 companies |
|  | Branch offices wholly owned by Japanese companies and their branches   | 0 companies |
|  | joint ventures (local corporations in which Japanese companies have a direct or indirect stake of 10% or more)   | 0 companies |
|  | joint ventures (Branch offices in which Japanese companies have a direct or indirect stake of 10% or more)       | 0 companies |
|  | companies established overseas by Japanese nationals (in which Japanese nationals have a stake of 10% or more)   | 0 companies |
|  | Unknown classification   | 0 companies |
| Number of Japanese residents (2020 survey)                                   | Total  | 0 people    |
|  | Long-term residents  | 0 people    |
|  | Permanent resident   | 0 people    |
| Business Environment   | Doing Business 2020 Rank   | 146th place |
| PPP Project  | Existence of PPP law scheme  | ○           |
|  | PPP project with Japanese companies  | 0 cases     |





Source: Survey Team

## 11. Guatemala

### 11.1 Country overview (basic information)

#### 11.1.1 Basic information

The Republic of Guatemala (Spanish: República de Guatemala), commonly known as Guatemala, is a republican nation located in northern Central America. It borders Mexico to the north, Belize to the northeast, Honduras to the east, and El Salvador to the southeast, facing the Caribbean Sea to the northeast and the Pacific Ocean to the south. The capital is Guatemala City. The Mayan civilization flourished during the Pre-Columbian period, and the majority of the population is still Maya indihena, the most populous country in Central America except Mexico. Economically, it belongs to the middle group of Central America along with El Salvador, but the Guatemalan civil war that lasted from 1960 to 1996 still leaves Guatemalan society in an unstable state in terms of security and politics. Guatemala is one of the few nations to nationally recognize the Republic of China (Taiwan) as of September 2020, and has the oldest diplomatic relations (established diplomatic relations in 1933).

#### 11.1.2 General circumstances

|             |  |                 |  |
|-------------|--|-----------------|--|
| 1 area      | 108,889 square kilometers (slightly larger than Hokkaido and Shikoku combined) | 2 Population    | 16.6 million (2019 World Bank (estimated))   |
| 3 Capital   | Guatemala City   | 4 ethnic groups | Maya indigenous people 41.7%, Mestizo (mixed race of European and indigenous people) / European 56%, others (Garifuna, Xinca, etc.) 2.3% |
| 5 languages | Spanish (official language), 22 other Maya languages, etc.                     | 6 religion      | Mainly Catholic and Protestant   |

Source: Ministry of Foreign Affairs HP Guatemala Republic Basic Data

#### 11.1.3 Economic overview

|                          |   |                              |  |
|--------------------------|---|------------------------------|--|
| 1 Major industry         | Agriculture (coffee, banana, sugar, cardamom, edible oils and fats), textile industry   | 2 GDP<br>3 GNI / person      | US \$ 76.69 billion (2019, Central Bank)<br>US \$ 8,830 (2019) |
| 4 Economic growth rate   | -2.0% (2019, Central Bank)  | 5 Unemployment rate          | 2.25% (2019, National Statistical Institute)                   |
| 6 Price increase rate    | 4.82% (2020, National Statistical Institute)  |                              |  |
| 7 Total trade amount     | Export (FOB): US \$ 11,169.6 million<br>Import (CIF): US \$ 19,881.7 million (2019, Central Bank)   |                              |  |
| 8 Major trade items      | Export: Clothing / textile, banana, coffee, sugar, cardamom, edible oils and fats<br>Imports: Automobiles, Machinery, Plastic Products, Gasoline, Diesel (2019, Central Bank)   |                              |  |
| 9 Major trading partners | Exports: USA, El Salvador, Honduras, Mexico, Nicaragua<br>Imports: USA, China, Mexico, El Salvador, Costa Rica (2019, Central Bank)   |                              |  |
| 10 currencies            | Quetzal (Q)   | 11 Foreign currency reserves | \$ 18.46 billion (2020, Central Bank)                          |
| 12 National budget       | \$ 14.36 billion (2020, Ministry of Finance)  | 13 External debt balance     | \$ 9.703 billion (2019, Central Bank)                          |
| 14 Economic overview     | The textile industry such as clothing and agricultural products such as coffee, sugar and bananas are the main export products, and agricultural products are unstable because they depend on international market prices, but the textile industry remains strong. The tourism industry is also growing significantly. Since 2010, the economic growth rate has been stable at a low level of 3-4%. It is estimated that more than half of the population is poor, living on less than \$ 5 a day, and solving the poverty problem requires achieving higher economic growth rates and job creation. More than 10% of the population (more than 2 million people) have moved to the United States, and overseas remittances support the households of poor families (equivalent to more than 10% of GDP. In 2019, \$ 10.5 billion (Guatemala Central Bank)). In 2000, a free trade agreement with Mexico was signed with Honduras and El Salvador. On July 1, 2006, the US-Central America-Dominican (Joint) Free Trade Agreement (DR-CAFTA) came into effect. In December 2013, the Central America-EU Cooperation Agreement came into effect. In June 2017, customs unification began to consolidate the customs of the two countries into one for the purpose of simplifying the movement of goods between Guatemala and Honduras. With the addition of El Salvador, it will be implemented in the three countries from December 2018, aiming for further |                              |  |

|  |  |
|--|--|
|  | <p>expansion.<br/>Guatemala has maintained an economic growth rate of around 3% since 2010, but fell to -2% in 2020 due to the effects of the new coronavirus infection. On the other hand, even in the case of Corona, the total amount of remittances from overseas in 2020 is expected to reach a record high, reaching 14% of GDP.</p> |
|--|--|

Source: Ministry of Foreign Affairs HP Guatemala Republic Basic Data

## 11.1.4 Government of Japan Development Cooperation Policy by Country

### (1) Country-specific development cooperation policy

**Table 11-1 Overview of Japan's ODA to Guatemala**

|  |  |
|--|--|
| 1. 1. Overview   |  |
| Japan's economic cooperation with Guatemala began with the conclusion of the technical cooperation agreement in 1977, and has been implementing general grant-in-aid for aid since 1978. In 1987, the Japan Overseas Cooperation Volunteers (JOCV) dispatch arrangement was signed, and dispatch began in 1988. Japan is currently providing support such as technical cooperation, grant-in-aid for aid, and loan aid as one of the major donor countries in Guatemala.   |  |
| 2. 2. Aim of development cooperation   |  |
| Guatemala, which has the largest population in Central America, has endeavored to establish peace and civilism and reduce disparities in local cities since the end of the civil war in 1996, but the poverty rate is still high and the disparities between regions and ethnic groups are large. The development index is the second lowest in Central and South America and the Caribbean after Haiti and Honduras. In addition, improving vulnerability to natural disasters has become a major issue. Guatemala plays an important role in regional integration, including attracting regional organizations such as the Central American Parliament (PARLACEN), the Central American Integration System Secretariat (SIECA), and the Central American Disaster Prevention Coordination Center (CEPRENAC). Japan's support for the country is significant from the perspective of contributing not only to deepening bilateral relations but also to promoting integration in the Central American region. |  |
| 3. 3. Basic policy   |  |
| The basic policy is to support the promotion of sustainable growth focusing on the social and economic development of poor areas so that the social and economic development of Guatemala will be solid. In addition, in order to deal with vulnerability to natural disasters, we will utilize Japan's technology and knowledge to provide support in the field of environment and disaster prevention in the country.  |  |
| 4. Priority areas  |  |
| <p>(1) Social and economic development in poor areas: Support for social development (health / hygiene, education, etc.) and economic development (transportation infrastructure, small and medium-sized enterprises, rural development, etc.) in areas where many poor people and indigenous people live. By doing so, it contributes to the correction of disparities with urban areas and promotes sustainable and inclusive growth.</p> <p>(2) Environment / disaster prevention: Environmental conservation such as introduction of clean energy utilizing Japan's knowledge, and disaster risk, paying attention to deterioration of living environment due to water pollution and waste treatment and vulnerability to frequent natural disasters. We will provide support in the field of disaster prevention, such as mitigation and response in the event of a disaster.</p>   |  |

Source: Ministry of Foreign Affairs HP Guatemala Country Data Collection 2017

**Table 11-2 National Development Cooperation Policy for Guatemala (September 2017)**

|   |   |
|---|---|
| 3. 3. Priority field (medium goal)                |   |
| (1) Social and economic development in poor areas | By supporting social development (health / hygiene, education, etc.) targeting basic needs and economic development (transportation infrastructure, small and medium-sized enterprises, rural development, etc.) with the goal of maintaining / improving livelihoods, we can work with urban areas. Contributes to the correction of disparities and promotes sustainable and inclusive growth |
| (2) Environment / disaster prevention             | We will provide support in the fields of environmental conservation and disaster prevention, such as raising environmental awareness, reducing disaster risk, and responding in the event of a disaster.  |
| (3) Improving security                            | The Guatemalan government has positioned the strengthening of security as an important issue, and Japan will consider providing support to the extent possible.   |

Source: Survey Team

### (2) Survey on COVID-19 by development partners

We extracted sector names and specific quantitative figures that have a large impact on the country-specific analysis described in various reports of development partners. Reports from the World Bank, OECD, BCIE, SICA, and the Ministry of Economy, Trade and Industry of Japan suggest the importance of introducing digitalization and innovation (Fintech, Agrotech, Autotech, etc.), and

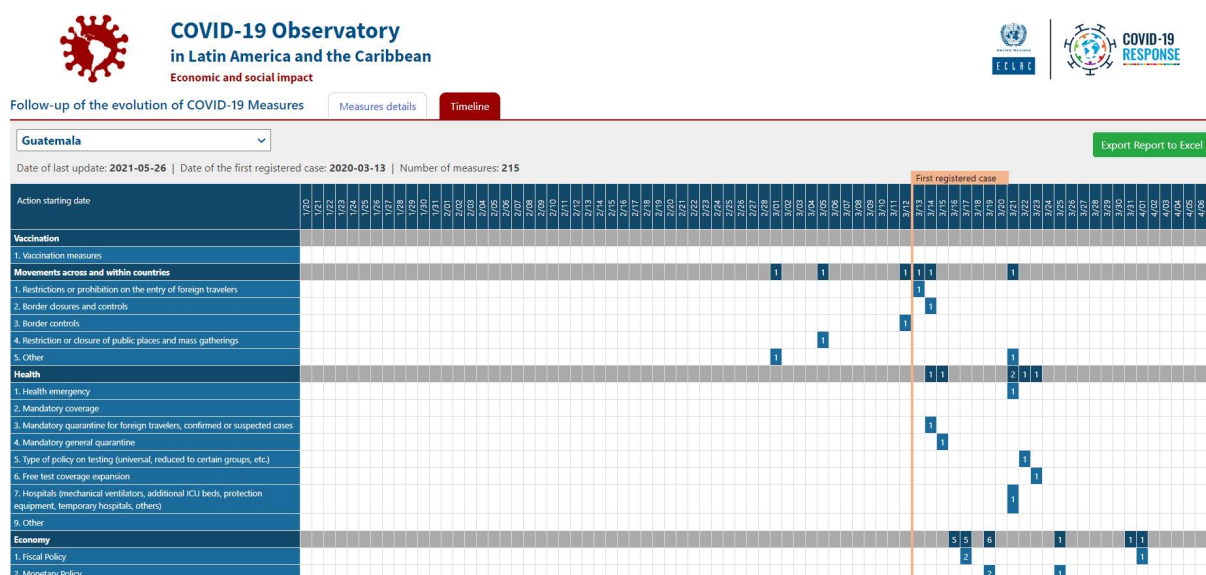
incorporate the survey results of these development partners. I arranged it accordingly.

World Bank: "Growth and Revitalization" 2021 Semi-Annual Economic Report (March 2021)

- ✓ OECD: COVID-19 in LAC, Regional socio-economic implications and policy priorities (December 2020)
- ✓ BCIE: Impacto Económico del COVID-19 (April 2020)
- ✓ SICA: Estimación del Impacto Económico del COVID-19 en Centroamérica y República Dominicana (April 2020)
- ✓ Ministry of Economy, Trade and Industry of Japan: "Economic and Industrial Policy Based on the Impact of the New Corona Virus" (June 2020), Accelerating Digitization and Onlineization, Gig Economy, Innovation in the Transition to a New Everyday Life 1) Medical care / health, 2) Digital: Infrastructure development premised on the arrival of a digital society, 3) Green: Response to climate change problems, Energy security, 4) Emphasizes resilience.

### 11.1.5 Policies for COVID-19 measures taken by governments of each country

Various policies for COVID-19 taken by the government are described on the ECLAC homepage "COVID-19 Observatory" by country, time series, and field, and can be analyzed.



Source: <https://cepalstat-prod.cepal.org/forms/covid-countrysheet/index.html?country=GTM>

In this survey, the 130 policies implemented in El Salvador listed on this website are classified by sector as much as possible.

#### 1) Infection spread and alleviation of aggravation and death

No material was available.

#### 2) Support for affected industries and people

**Table 11-3 Support for Affected Industries and People (Guatemala)**

| Various government policies (COVID-19 Observatory for LAC) |    |
|--|----|
| Socioeconomic policy                                       | 37 |
| Health care & nutrition                                    | 31 |
| Education  | 9  |
| Agriculture & rural development                            | 0  |
| Private sector   | 24 |
| Environment & disaster prevention                          | 0  |
| Governance and social security                             | 15 |

| Various government policies (COVID-19 Observatory for LAC) |  |     |  |
|--|--|-----|--|
| DX and innovation  |  | 3   |  |
| Infrastructure & energy                                    |  | 2   |  |
| Tourism  |  | 0   |  |
| PPP  |  | 0   |  |
| Others (b)   |  | 9   |  |
| total  |  | 130 |  |

Source: Survey Team

### 3) Arrangement of various policies for COVID-19 taken by the government

COVID-19 Observatory for Latin America and Caribbean (ECLAC) organized by governments

**Table 11-4 Government-directed COVID-19 Policy Categories (Guatemala)**

#### Follow-up of the evolution of COVID-19 Measures

| Vaccination   | Economy  | Social protection   |
|---|--|---|
| 1. Vaccination measures   | 1. Fiscal Policy   | 1. Cash transfers (new transfers, increase in existing transfers, expansion of cash transfers to new recipients, early disbursement of transfers) |
| <b>Movements across and within countries</b>  | 2. Monetary Policy   | 2. Food transfers / In-kind transfers   |
| 1. Restrictions or prohibition on the entry of foreign travelers  | 3. Business policy   | 3. Guarantee of basic services  |
| 2. Border closures and controls   | 4. Restriction of economic activity (including shops and shopping centers)                             | <b>Education / schools</b>  |
| 3. Border controls  | 5. Price and quantity controls   | 1. Suspension of classes  |
| 4. Restriction or closure of public places and mass gatherings  | 6. Economic Stimulus (includes aggregate value of fiscal measures and separately of credit guarantees) | 2. Provision of tools for distance learning (online platforms, TV, radio, distance-learning materials)  |
| 5. Other  | 7. Regulation of the personal hygiene and cleaning products market                                     | 3. Maintenance of school feeding programme (indicating under which modalities)  |
| <b>Health</b>   | 8. Debt relief and suspension of credit payments (individuals, microentrepreneurs)                     | <b>Gender</b>   |
| 1. Health emergency   | 9. Other   | 1. Gender-based violence against women  |
| 2. Mandatory coverage   | <b>Labor</b>   | 2. Care economy   |
| 3. Mandatory quarantine for foreign travelers, confirmed or suspected cases                                   | 1. Labor Protection  | 3. Employment and income generation   |
| 4. Mandatory general quarantine   | 2. Elective work leave   | 4. Benefits, transfers and other social protection measures   |
| 5. Type of policy on testing (universal, reduced to certain groups, etc.)                                     | 3. Reduction of working hours  | 5. Women's participation in the digital era   |
| 6. Free test coverage expansion   | 4. Prohibition of dismissal from work  | 6. Other  |
| 7. Hospitals (mechanical ventilators, additional ICU beds, protection equipment, temporary hospitals, others) | 5. Other   |   |

Source: Survey Team

## 11.2 Macroeconomic analysis and selection of priority countries

### 11.2.1 Macroeconomic analysis

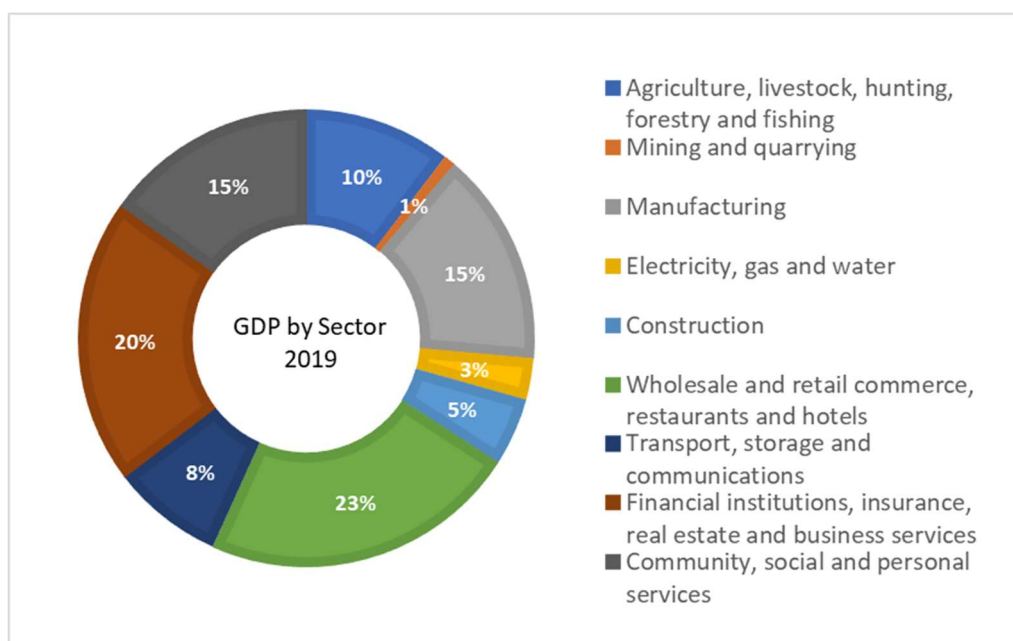
#### (1) Industrial composition

**Table 11-5 Industrial Composition (Guatemala)**

Table: Gross domestic product, by sector (En millones de quetzales a precios constantes de 2013)

|  | 2011    | 2012    | 2013    | 2014    | 2015    | 2016    | 2017    | 2018    | 2019a/  | 2020 b/ |
|--|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Agriculture, livestock, hunting, forestry and fishing                | 27,695  | 29,063  | 43,122  | 43,814  | 44,964  | 46,038  | 47,457  | 48,613  | 49,767  | 51,222  |
| Mining and quarrying   | 1,572   | 1,269   | 5,827   | 8,543   | 8,906   | 8,098   | 5,725   | 3,937   | 4,053   | 3,988   |
| Manufacturing  | 37,123  | 38,339  | 60,028  | 62,080  | 64,358  | 66,270  | 68,194  | 70,384  | 72,669  | 72,531  |
| Electricity, gas and water   | 5,531   | 5,884   | 11,883  | 12,657  | 12,727  | 13,217  | 13,931  | 14,247  | 14,042  | 14,349  |
| Construction   | 6,074   | 6,121   | 17,835  | 19,164  | 19,466  | 19,409  | 19,993  | 21,010  | 23,029  | 21,600  |
| Wholesale and retail commerce, restaurants and hotels                | 30,578  | 31,482  | 87,509  | 90,819  | 94,637  | 97,640  | 100,800 | 103,827 | 108,092 | 103,937 |
| Transport, storage and communications                                | 22,002  | 22,677  | 30,196  | 31,001  | 32,681  | 33,836  | 35,201  | 36,647  | 38,002  | 36,137  |
| Financial institutions, insurance, real estate and business services | 45,858  | 47,971  | 75,108  | 78,542  | 82,737  | 85,294  | 88,482  | 91,820  | 96,918  | 98,712  |
| Community, social and personal services                              | 27,191  | 28,395  | 60,511  | 63,012  | 65,321  | 66,914  | 68,751  | 70,936  | 72,400  | 70,309  |
| Total  | 203,624 | 211,201 | 392,018 | 409,633 | 425,796 | 436,717 | 448,533 | 461,422 | 478,972 | 472,785 |

Source: ECLAC



Source: Survey Team



## (2) Trends in major economic indicators

**Table 11-6 Trends in Major Economic Indicator (Guatemala)**

|  | 2011     | 2012     | 2013     | 2014     | 2015     | 2016     | 2017     | 2018     | 2019a/   | 2020 b/  |
|--|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|
| Gross domestic product (Annual growth rates c/)                      | 4.2      | 3.0      | 3.7      | 4.4      | 4.1      | 2.7      | 3.0      | 3.2      | 3.9      | -1.5     |
| Per capita gross domestic product (Annual growth rates c/)           | 1.9      | 0.8      | 1.5      | 2.3      | 2.0      | 0.6      | 1.0      | 1.2      | 6.0      | -0.4     |
| Gross domestic product, by sector (Annual growth rates c/)           |          |          |          |          |          |          |          |          |          |          |
| Agriculture, livestock, hunting, forestry and fishing                | 5.0      | 4.9      | 4.7      | 1.6      | 2.6      | 2.4      | 3.1      | 2.4      | 2.1      | 2.9      |
| Mining and quarrying   | 18.4     | -19.3    | 3.5      | 46.6     | 4.2      | -9.1     | -29.3    | -31.2    | 2.8      | -1.6     |
| Manufacturing  | 3.0      | 3.3      | 3.5      | 3.4      | 3.7      | 3.0      | 2.9      | 3.2      | 3.1      | -0.2     |
| Electricity, gas and water   | 5.6      | 6.4      | 5.2      | 6.5      | 0.6      | 3.8      | 5.4      | 2.3      | -1.3     | 2.2      |
| Construction   | 2.4      | 0.8      | 1.7      | 7.5      | 1.6      | -0.3     | 3.0      | 5.1      | 9.5      | -6.2     |
| Wholesale and retail commerce, restaurants and hotels                | 3.7      | 3.0      | 3.2      | 3.8      | 4.2      | 3.2      | 3.2      | 3.0      | 4.2      | -3.8     |
| Transport, storage and communications                                | 4.8      | 3.1      | 2.9      | 2.7      | 5.4      | 3.5      | 4.0      | 4.1      | 3.7      | -4.9     |
| Financial institutions, insurance, real estate and business services | 4.1      | 4.6      | 4.9      | 4.6      | 5.3      | 3.1      | 3.7      | 3.8      | 4.6      | 1.9      |
| Community, social and personal services                              | 4.4      | 4.4      | 4.8      | 4.1      | 3.7      | 2.4      | 2.7      | 3.2      | 2.4      | -2.9     |
| Balance of Payments (Millions of dollars)                            |          |          |          |          |          |          |          |          |          |          |
| Current account balance  | -1,579.8 | -1,847.1 | -2,238.8 | -1,909.3 | -773.8   | 637.3    | 803.6    | 595.1    | -7,966.9 | -5,926.7 |
| Goods balance  | -5,340.0 | -6,428.2 | -6,749.0 | -6,782.1 | -6,439.2 | -6,077.1 | -6,810.1 | -7,995.7 | -7,966.9 | -5,926.7 |
| Exports, f.o.b.  | 8,968.7  | 8,579.6  | 8,663.1  | 9,375.3  | 9,084.9  | 8,972.5  | 9,650.5  | 9,643.7  | 9,918.5  | 10,514.5 |
| Imports, f.o.b.  | 14,308.6 | 15,007.8 | 15,412.1 | 16,157.4 | 15,524.0 | 15,049.6 | 16,460.7 | 17,639.4 | 17,885.4 | 16,441.2 |
| Services trade balance   | -92.8    | -76.8    | 34.2     | 74.1     | 80.7     | 222.2    | 290.5    | 167.3    | 49.4     | -250.3   |
| Income balance   | -1,303.4 | -1,025.0 | -1,236.0 | -1,517.0 | -1,486.5 | -1,425.3 | -1,501.1 | -1,519.7 | -1,411.6 | -1,398.3 |
| Net current transfers  | 5,156.3  | 5,682.9  | 5,712.1  | 6,315.6  | 7,071.1  | 7,917.4  | 8,824.3  | 9,943.2  | 11,120.3 | 11,824.3 |
| Capital and financial balance (Millions of dollars)                  |          |          |          |          |          |          |          |          |          |          |
| Net foreign direct investment d/                                     | 1,139.6  | 1,226.2  | 1,448.9  | 1,387.7  | 1,048.1  | 965.0    | 934.1    | 791.2    | -799.4   | -704.5   |
| Other capital movements d/   | 654.1    | 1,138.6  | 1,528.0  | 647.4    | 230.9    | -178.3   | 862.8    | -398.4   | 29.5     | 954.9    |
| Foreign remittance from abroad for 2019 and 2020                     | 490.3    | 1,339.9  | 1,740.8  | 518.2    | -207.5   | -638.6   | 295.7    | -1,126.9 | -1,330.6 |          |
| Remittances from emigrant workers                                    | 4,378.0  | 4,782.7  | 5,105.2  | 5,544.1  | 6,285.0  | 7,160.0  | 8,192.2  | 9,287.8  | 10,508.3 | 11,340.4 |

Source: Economic Survey of Latin America and the Caribbean 2020: Main conditioning factors of fiscal and monetary policies in the post-COVID-19 era

### 11.2.2 Impact analysis and identification of key sectors

#### (1) Impact assessment results for each sector by AHP analytic hierarchy process based on economic indicators

**Table 11-7 Results of Sector Impact Analysis by COVID-19 (Guatemala)**

| ECLAC category   | Changes around COVID-19 | Trends before COVID-19 | Total GDP ratio of the sector | comprehensive evaluation |   |
|--|-------------------------|------------------------|-------------------------------|--------------------------|---|
| Importance (weight)  | 0.459                   | 0.066                  | 0.075                         |                          |   |
| Agriculture, livestock, hunting, forestry and fishing                | 2                       | 3                      | 5                             | 0.033                    | 8 |
| Mining and quarrying   | 8                       | 1                      | 1                             | 0.085                    | 3 |
| Manufacturing  | 4                       | 2                      | 6                             | 0.054                    | 7 |
| Electricity, gas and water   | 1                       | 8                      | 2                             | 0.025                    | 9 |
| Construction   | 9                       | 4                      | 3                             | 0.103                    | 1 |
| Wholesale and retail commerce, restaurants and hotels                | 7                       | 5                      | 9                             | 0.094                    | 2 |
| Transport, storage and communications                                | 6                       | 7                      | 4                             | 0.078                    | 4 |
| Financial institutions, insurance, real estate and business services | 3                       | 9                      | 8                             | 0.057                    | 6 |
| Community, social and personal services                              | 5                       | 6                      | 7                             | 0.071                    | 5 |

Source: Survey Team

#### 1) Amendment of ECLAC sector classification to this sector classification and selection of priority sectors

In line with the method described in the main volume, the Sector Classification is divided into the Vertical Sector and the Cross-Cutting Sector, the ECLAC classification sector is allocated to the Vertical Sector Classification, and the evaluation of various policies related to COVID-19 taken by the government along with the results of the partner survey and the indicators of the national development

cooperation policy, the ranking of priority sectors are calculated using the four indicators, which are described in the table below.

**Table 11-8 Ranking of Priority Sectors (Guatemala)**

|                                   | Economic Indicator Analysis | Government Policy on COVID-19 | Survey on COVID-19 by Development Partners | Country Development Cooperation Policy |           |                         |
|-----------------------------------|-----------------------------|-------------------------------|--|--|-----------|-------------------------|
| Importance (weight)               | 0.6000                      | 0.2000                        | 0.1000                                     | 0.1000                                 | Base Case | Priority                |
| Social and Economic Policy        | 0.0000                      | 0.0569                        | 0.0100                                     | 0.0125                                 | 0.0794    | <input type="radio"/>   |
| Health and Nutrition              | 0.0378                      | 0.0477                        | 0.0100                                     | 0.0125                                 | 0.1080    | 3 <input type="radio"/> |
| Education                         | 0.0300                      | 0.0138                        | 0.0100                                     | 0.0125                                 | 0.0664    | 6 <input type="radio"/> |
| Agriculture and Rural Development | 0.0703                      | 0.0000                        | 0.0000                                     | 0.0125                                 | 0.0828    | 5 <input type="radio"/> |
| Manufacturing                     | 0.1482                      | 0.0369                        | 0.0100                                     | 0.0125                                 | 0.2076    | 2 <input type="radio"/> |
| Environment/ Disaster Management  | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0125                                 | 0.0125    | <input type="radio"/>   |
| Governance and Security           | 0.0000                      | 0.0231                        | 0.0000                                     | 0.0125                                 | 0.0356    | <input type="radio"/>   |
| DX Innovation                     | 0.0000                      | 0.0046                        | 0.0300                                     | 0                                      | 0.0346    | <input type="radio"/>   |
| Infrastructure and Every          | 0.2476                      | 0.0031                        | 0.0100                                     | 0.0125                                 | 0.2732    | 1 <input type="radio"/> |
| Tourism                           | 0.0661                      | 0.0000                        | 0.0200                                     | 0                                      | 0.0861    | 4 <input type="radio"/> |
| Public-Private Partnership        | 0.0000                      | 0.0000                        | 0.0000                                     | 0                                      | 0.0000    | <input type="radio"/>   |

Source: Survey Team

## (2) Sensitivity analysis

### 1) Analysis case settings

Based on the above methodology, the following case settings were made.

**Table 11-9 Sensitivity Analysis Case-based Weighting Settings (Guatemala)**

|  | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|--|-----------|------------------------|------------------------|------------------------|
| Economic indicator analysis  | 0.6       | 0.6                    | 0.5                    | 0.5                    |
| Investigation and arrangement of various policies for COVID-19 taken by the government | 0.2       | 0.1                    | 0.1                    | 0.1                    |
| Development partner survey results   | 0.1       | 0.2                    | 0.2                    | 0.3                    |
| Country-specific development cooperation policy  | 0.1       | 0.1                    | 0.2                    | 0.1                    |

Source: Survey Team

### 2) Summary of sensitivity analysis

The results of each sensitivity analysis are as summarized below. Sensitivity analysis did not show much change, which was close to the result of the base case.

**Table 11-10 Summary of Sensitivity Analysis Results (Guatemala)**

|                                   | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|-----------------------------------|-----------|------------------------|------------------------|------------------------|
| Social and economic policy        |           |                        |                        |                        |
| Health care / nutrition           | 3         | 4                      | 3                      | 4                      |
| education                         | 6         | 6                      | 6                      | 5                      |
| Agriculture / rural development   | 5         | 5                      | 5                      | 6                      |
| Manufacturing industry            | 2         | 2                      | 2                      | 2                      |
| Environment / disaster prevention |           |                        |                        |                        |
| Governance and citizen security   |           |                        |                        |                        |
| DX / Innovation                   |           |                        |                        |                        |
| Infrastructure and Energy         | 1         | 1                      | 1                      | 1                      |
| sightseeing                       | 4         | 3                      | 4                      | 3                      |
| Public-private partnership        |           |                        |                        |                        |

Source: Survey Team

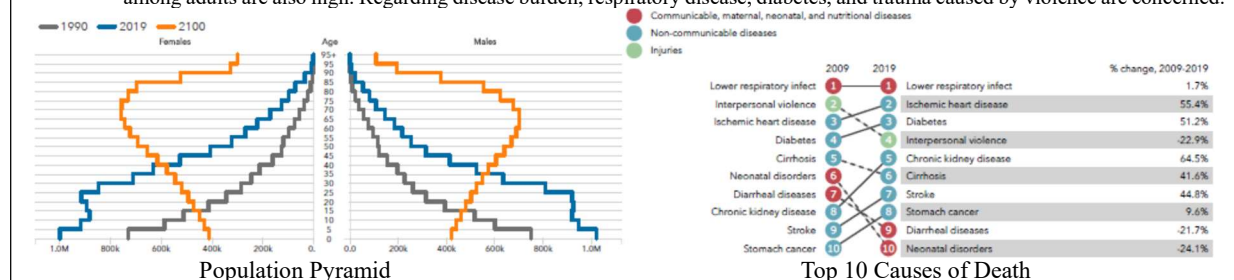
### **(3) Selection of priority sectors by country**

From the above results, 1) social / economic policy, 2) health / medical / nutrition, 3) manufacturing, 4) environment / disaster prevention, 5) governance / citizen security, 6) DX / innovation, 7) infrastructure / energy, 8) Tourism, 9) Public-private partnership are selected as priority sectors.

## 11.3 Country-specific information by sector

### 11.3.1 Health care / nutrition

Overview: Maternal mortality ratio and under-five mortality rate are high. Immunization coverage among children is low. Proportion of stunting among children is the highest among the target countries. Also, undernutrition among total population and overweight among adults are also high. Regarding disease burden, respiratory disease, diabetes, and trauma caused by violence are concerned.



| Demography                                      |   |   |  |                                       |                                   |                                  |
|---|---|---|--|---------------------------------------|-----------------------------------|----------------------------------|
| Population                                      | Urban population (%)                      | Urban population growth (%)                     | Life Expectancy (years)                        |                                       |                                   | Population ≥65 (%)               |
|   |   |   | Male   | Female                                | Both                              |                                  |
| 16,346,950                                      | 51.44                                     | 2.31  | 76.94  | 71.12                                 | 74.06                             | 4.81                             |
| Maternal, Newborn and Child Health              |   |   |  |                                       |                                   |                                  |
| Total fertility rate                            | Neonatal mortality (per 1,000 livebirths) | Under 5mortality (per 1,000 livebirths)         | Maternal mortality (per 100,000 livebirths)    | Antenatal care ≥4 (%)                 | Immunization (1yr)                |                                  |
| 2.87  | 12.60                                     | 25.40   | 95   | 86                                    | DTP (%)                           | MCV1 (%)                         |
|   |   |   |  |                                       | 86                                | 87                               |
| Nutrition                                       |   |   | Health Finance                                 |                                       |                                   |                                  |
| Under 5 Children                                | Adult overweight (%)                      | Current health expenditure per capita (USD PPP) |  | Current health expenditure to GDP (%) | Out-of-pocket expenditure (%)     |                                  |
| Stunting (%)                                    | Overweight (%)                            | Male  | Female   |                                       |                                   |                                  |
| 46.7  | 4.9                                       | 36  | 34   | 470                                   | 5.71                              | 54                               |
| Health Service Provision (per 1,000 population) |   |   | COVID-19 related Indicators as of January 2022 |                                       |                                   |                                  |
| Hospital beds                                   | Doctors                                   | Nurses  | Total confirmed cases (per million)            | Total death (per million)             | Total number of tests (per 1,000) | People completed vaccination (%) |
| 0.60  | 0.4                                       | 0.1   | 36,319.61                                      | 888.94                                | 191.68                            | 28.26                            |

Source: Graphs=Institute for Health Metrics and Evaluation, County Profile; Demography, Total fertility rate, Neonatal mortality, under-5 mortality, Health finance= World Development Indicators, the World Bank (Accessed on Aug 2021); Maternal mortality= UNICEF (Sep 2019); Antenatal care, Immunization, Nutrition, Health service provision,= OECD/The World Bank (2020), Health at a Glance: Latin America and the Caribbean 2020; COVID-19 related indicators= Our World in Data (Accessed on Jan 2022)

| Health                                  |   |
|---|---|
| Leadership/ Governance                  | Responsible Agency: Ministerio de Salud Pública y Asistencia Social (MSPAS)<br><a href="https://www.mspas.gob.gt/">https://www.mspas.gob.gt/</a><br>Centralized<br>Major Relevant Policies: Lineamientos Generales de Política en Salud 2020-2024       |
| Service Providing System                | Public sector is the main provider, but quantity is not sufficient for growing population.  |
| Health Finance                          | Government fund/ High out-of-pocket expenses  |
| Human Resource for Health               | Not sufficient to cover the population/ Concentrating to urban areas  |
| IT/ Digital Health                      | National eHealth Strategy. Health information management system (indicators, human resource for health, and drugs)<br>Telemedicine clinics were established with PAHO assistance in December 2020.  |
| Drugs/ Medical Equipment                | The largest pharmaceutical industry in the Central America. Around 40% of over-the-counter drugs are generic.   |
| Priority                                | Health improvement of women, children and other vulnerable groups/ service providing system in rural areas. Other priorities include transparency, referral system strengthening, PHC, health sector reform, as well as maternal and newborn nutrition. |
| Communicable Disease Emergency Response | Necessary action and responses are undertaken along with IHR.<br>National reference lab: Laboratorio Nacional de Salud, Ministerio de Salud Publica y Asistencia Social   |
| Major Development Partners              | PAHO/WHO, World Bank, IDB   |
| Nutrition                               |   |
| Institutional Arrangement               | National Council for Food and Nutrition Security (CONASAN)  |
| Major Relevant Policies                 | Law on the National Food and Nutrition Security System (SINASAN)<br>National Strategic Plan on Food Security and Nutrition (PESAN)<br>Gran Cruzada Nacional por la Nutrition, 2021  |

|                           |   |
|---------------------------|---|
| Human Resource for Health | Nutrition related degrees: Yes<br>Nutrition related subjects in pre-service education: Yes<br>Number of nutrition related professionals: 3.1 per 100,000 population |
|---------------------------|---|

Source: Survey team with reference to WHO Country Cooperation Strategy for Guatemala at a glance, May 2016, Institute for Health Metrics and Evaluation, County Profile, Telemedicine Clinics in Guatemala, Feb 2021, JICA, Final report of data collection survey on UHC in Latin America and Caribbean Region, 2021, SUN Website, WHO, Global atlas of medical devices, 2017, and WHO, Nutrition Landscape Information System (NLIS)

### 11.3.2 Education

| Overview   |   |   |                  |                 |                 |               |         |
|--|---|---|------------------|-----------------|-----------------|---------------|---------|
| Number of children   | Education level   | Preschool   | primary          | Lower secondary | Upper secondary |               |         |
|  | 2019  | 589,943 people  | 2,365,800 people | 778,888 people  | 416,177 people  |               |         |
| Source: Institute for Statistics (UIS), UNESCO Bureau of Statistics  |   |   |                  |                 |                 |               |         |
| Government authority   | Ministry of Education (Ministerio de Educación)   |   |                  |                 |                 |               |         |
| Education indicator  | Net enrollment rate: primary education 89.3%, lower secondary 67.2%, upper secondary 40.8% (2019)<br>Primary education completion rate 79.1% (2019), out-of-school children rate 10.7% (2019), public education budget GDP ratio 3.2% (2019) Source: UIS  |   |                  |                 |                 |               |         |
| Learning achievement survey  | PISA-D 2015 (PISA for Development) The average of reading comprehension, mathematics, and science of 7 <sup>th</sup> grade student assessment is below the average of OECD countries. 70% of students who do not reach level 2 “understand the basics”. In the 3 <sup>rd</sup> Regional Education Quality Survey (TERCE, 2013), 3 <sup>rd</sup> and 6 <sup>th</sup> grades were ranked 11 <sup>th</sup> out of 15 countries and below average, reading comprehension was 11 <sup>th</sup> out of 15 countries and below average, and science was 10 <sup>th</sup> out of 5 countries below average. |   |                  |                 |                 |               |         |
| Impact of COVID-19   |   |   |                  |                 |                 |               |         |
| School closure / reopening   | From March 20, 2020 (school activities suspended due to the Ordinance of the Ministry of Education) to February 2, 2021, 165 days of complete closure and 22 days of partial closure. The fifth longest of the 23 Central American Caribbean countries.<br>From February to April 2021, the remote type, and from May to October, the school is a hybrid type (mixed face-to-face and distance lessons). It is not obligatory to go to school, but it is carried out by the decision of parents (for families who are worried about infection, remote lesson is permitted).                         |   |                  |                 |                 |               |         |
| COVID-19 measures  | <ul style="list-style-type: none"> <li>Measures based on the “Governance System for Risk and Disaster Management for School Safety (Sistema de Gobernanza para la Gestión de Riesgos y Desastres para la Seguridad Escolar)” established by the 2014 Ministry of Education</li> <li>Ministry of Education “Comprehensive Plan for Prevention, Response and Recovery of Coronavirus (COVID-19) (Plan Integral para la Prevención respuesta y Recuperación ante el COVID-19)”</li> <li>Ministry of Education “Home Learning Strategy (#AprendoEnCasa)”</li> </ul>                                     |   |                  |                 |                 |               |         |
| Distance education   | Implementation status   | Developed a virtual learning platform “Let’s learn at home and in the classroom” with the cooperation of UNICEF and the Canadian Embassy. In addition, classes on TV and radio are distributed daily, and printed materials are distributed to children who have difficulty accessing.<br>Delivering educational content on math and reading comprehension for all grades on TV channel 13 with access to 1,937,911 students. In 2020, 265 teachers create 1,803 session educational content and distribute 149 programs to primary, secondary and non-formal education children. In 2021, contracted teachers developed and distributed teaching materials corresponding to learning modules (Ministry of Education). Established a virtual library on the Ministry of Education website, but there are only private and external books and teaching materials (no official textbooks). Supported by USAID.<br>Distance Education Readiness Index published by UNICEF is level 3 “Distance education systems are considered to be relatively resilient, but there remain serious concerns about the potential for learning loss and the ability to continue equivalent learning if face-to-face lessons are interrupted.”. |                  |                 |                 |               |         |
|  | Access  | School-aged children / students who can connect to the Internet at home (%) (2014-2015). Even the wealthy are less than 50%.  |                  |                 |                 |               |         |
|  |   |   | Rural area       | Urban area      | Poor class      | wealthy class | Overall |
|  |   | Whole school age  | 3                | 18              | 0               | 45            | 9       |
|  |   | Primary Education   | 2                | 16              | 0               | 43            | 8       |
|  |   | Lower secondary education   | 3                | 20              | 0               | 49            | 10      |
|  |   | Upper secondary education   | 4                | 24              | 0               | 52            | 12      |
| Source: UNICEF Global database on school-age digital connectivity<br>According to the BID report, only 5% of schools have the Internet. Also, most school-aged students are not connected at home. Coordination with the telephone |   |   |                  |                 |                 |               |         |

|                                       |   | company has been made so that access to the Ministry of Education's virtual platform is free (no data consumption) so that students and educators can access educational resources. <sup>10</sup>   |      |                              |        |                   |         |     |               |         |     |            |         |
|---------------------------------------|---|---|------|------------------------------|--------|-------------------|---------|-----|---------------|---------|-----|------------|---------|
|                                       | Teacher training  | <ul style="list-style-type: none"> <li>- Created a teacher training site on the Ministry of Education website. Curriculum priorities, improved learning effectiveness, differentiated education, social distance, virtual learning, educational and learning alternatives, emotion management</li> <li>- Online teacher training: "Aprendo en casa" platform provides "Revista Digital" for teachers. "Cursera para Guatemala" is free course for teachers</li> <li>- Digital Education Magazine "Estrategia Aprendo en Casa"</li> </ul>  |      |                              |        |                   |         |     |               |         |     |            |         |
| School hygiene                        | Infection control measures  | Creating a guide for returning to school for teachers, parents, children and students. The guide is divided into separate volumes for each role, duty, and theme, and can be downloaded from the Ministry of Education website. Standards have been set for verifying school opening, and each school has a system in which points are given according to hygiene and safety standards to ascertain the current situation.  |      |                              |        |                   |         |     |               |         |     |            |         |
|                                       | Facility maintenance  | <p>According to a newspaper article, the Ministry of Education announced that there are 9,824 schools without water and sanitation facilities, which were renovated during the school closure period, and that 1,279 facilities were renovated by 2020.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>2019</th> <th>Basic water supply equipment</th> <th>toilet</th> </tr> </thead> <tbody> <tr> <td>Primary education</td> <td>Not 19%</td> <td>76%</td> </tr> <tr> <td>Whole country</td> <td>Not 19%</td> <td>76%</td> </tr> <tr> <td>Rural area</td> <td>Not 27%</td> <td>...</td> </tr> </tbody> </table> <p>Survey conducted by the World Health Organization (WHO) and UNICEF<sup>11</sup><br/>Source: World Bank / UNICEF Survey <a href="https://washdata.org/">https://washdata.org/</a></p> | 2019 | Basic water supply equipment | toilet | Primary education | Not 19% | 76% | Whole country | Not 19% | 76% | Rural area | Not 27% |
| 2019                                  | Basic water supply equipment  | toilet  |      |                              |        |                   |         |     |               |         |     |            |         |
| Primary education                     | Not 19%   | 76%   |      |                              |        |                   |         |     |               |         |     |            |         |
| Whole country                         | Not 19%   | 76%   |      |                              |        |                   |         |     |               |         |     |            |         |
| Rural area                            | Not 27%   | ...   |      |                              |        |                   |         |     |               |         |     |            |         |
| School lunch / nutrition              | The Ministry of Education distributes food to public primary school children through the Parents' Association without suspending the nutrition program even during class suspension. In addition, parent groups donate 4 Quetzal per child per day. |   |      |                              |        |                   |         |     |               |         |     |            |         |
| Countermeasures for vulnerable people | <ul style="list-style-type: none"> <li>-Creation of infection prevention guidelines and educational materials in indigenous languages</li> <li>-Distribution of audio materials for visually impaired children</li> </ul>                           |   |      |                              |        |                   |         |     |               |         |     |            |         |
| Support for donors, etc.              | As described in the text of Progress Report 2.  |   |      |                              |        |                   |         |     |               |         |     |            |         |

Source: Survey Team

### 11.3.3 Agriculture / rural development

|   |  |           |           |           |           |           |
|---|--|-----------|-----------|-----------|-----------|-----------|
| Urban / rural population ratio                    | 51.1% / 48.9% (FAOSTAT 2018)   |           |           |           |           |           |
| Agricultural land area                            | 3,856,000 ha (FAOSTAT 2019) 1)   |           |           |           |           |           |
| Agricultural sector employment                    | 31.1% of all employment (male / female ratio: 87.5% / 12.5%) (FAOSTAT 2019) 2)   |           |           |           |           |           |
| Agricultural GDP                                  | 10.2% of total GDP (World Bank 2020)   |           |           |           |           |           |
| Of the agricultural sector Value added amount     | \$ 7,060,759.71 thousand dollars (World Bank 2020) 3) * Statistics include forestry  |           |           |           |           |           |
| Agricultural sector expenditure ratio             | Ratio of agricultural fiscal expenditure to national budget (%) 4)   |           |           |           |           |           |
|   | 2018   | 2019      | 2020      |           |           |           |
|   | 1.69   | 1.38      | 0.85      |           |           |           |
| Agricultural sector import / export balance       | Trade Balance (USD1,000 FAOSTAT) 5)  |           |           |           |           |           |
|   |  | 2015      | 2016      | 2017      | 2018      | 2019      |
|   | export   | 4,719,256 | 4,907,084 | 5,393,855 | 5,281,541 | 5,589,169 |
|   | Import   | 2,512,110 | 2,495,503 | 2,626,522 | 2,865,793 | 3,074,666 |
| Balance of payments                               | 2,207,146  | 2,411,581 | 2,767,333 | 2,415,748 | 2,514,503 |           |
| Agricultural development Policy / plan / strategy | The exports of Guatemala's agricultural products are very diverse, with basic grains (especially corn, beans and rice), traditional export agricultural products (coffee, sugar, bananas, cardamon) as well as fruits (mainly melons, It also includes non-traditional export agricultural products such as watermelon, mango) and fresh foods such as vegetables. The agricultural sector still contributes significantly to the national economy and employment, and the national plan to support the growth |           |           |           |           |           |

<sup>10</sup><https://socialdigital.iadb.org/es/edu/COVID-19/respuesta-regional/6084>

<sup>11</sup>WHO / UNICEF Joint Monitoring Program for water supply, sanitation and hygiene in schools



|                    |   |
|--------------------|---|
|                    | <p>and development of agriculture and rural areas is shown in the National Agricultural Grand Plan 2016-20206). The agricultural producer classification terminology used in this agricultural plan7) and the ratio to the total number of producers (2016) 8) are briefly shown below.</p> <ul style="list-style-type: none"> <li>• Infrastructure survival (8.1%): Small-scale farmers who are self-sufficient in basic agricultural products (corn and beans) and need to supplement the shortage of food supplies.</li> <li>• Survival (39.5%): Small-scale farmers who can produce basic agricultural products in a self-sufficient manner</li> <li>• Surplus producers (13.2%): Can produce basic agricultural products necessary for families and trade surplus products in the market.</li> </ul> <p>-Commercialized producers (26.5%): Producers for sale in the market</p> <p>The Agricultural Program focuses specifically on producers of infrastructure survival and survival categories, and ultimately on the transition to surplus producers. As a promotion policy, the project is to be created, promoted, and strengthened so that surplus products can be easily sold. Its specific objectives are 1) to develop agriculture and rural areas through sustainable and competitive production means, 2) to generate employment and income to reduce migration, and 3) to contribute to national food security. And ensure access to safe food, 4) reduce rural poverty.</p> <p>Agricultural problems recognized by the government are 1) low development due to family farming, 2) lack of marketing knowledge and poor access to markets, 3) reduced sector sustainability due to improper conventional farming, and climate change. Vulnerability and deterioration of natural resources, 4) Vulnerability as an institutional organization, etc. Agricultural policy 2016-20209) formulated for the purpose of solving these problems is to 1) improve productivity and generate surplus products in the form of family farming, 2) marketing, and market as countermeasures for each applicable problem. It consists of four strategic axis areas: activation of access, creation of framework and regulations, 3) preservation of natural resources by recycling resources, enhancement of resilience to climate change, and 4) strengthening of organizational management system. , There are objectives, guidelines, and action programs for each axis.</p>  |
| Impact of COVID-19 | <p>In Guatemala, restricted migration and cessation of agricultural activity affected the early and late crop cycles, affecting much of the food produced throughout 2020. For agricultural producers (bananas, coffee, sugar, African palm oil, rubber, livestock, dairy products, chicken eggs, pork, vegetables, fruits, gardening), food and beverage industries, agricultural transportation service companies, including agricultural inputs. A questionnaire survey conducted by Central America Business Intelligence (CABI)10) found that at least 68% of large enterprises have liquidity problems, compared to 82 for small and medium-sized enterprises that rely on daily sales. It turns out that% has a liquidity problem. Global demand has declined by 53% for all companies, regardless of size, due to contract cancellations and contractions. In addition, local demand has declined by 47%, mainly due to the closure of restaurants and the partial shortening of business hours in supermarkets and wet markets.</p> <p>The CGIAR Research Program on Climate Change, Agriculture and Food Security (CCAFS) Survey (2020) 11) also highlights the impacts on the livestock and fisheries sectors, primarily on difficult access to labor and employment. For example, 53% of beef cattle producers in the Zacapa region reported that it was difficult to hire workers.</p>   |
| Source / reference | <ol style="list-style-type: none"> <li>1) FAOSTAT-Land, Input and Sustainability-Land Use-Area-Agriculture (<a href="https://www.fao.org/faostat/en/#data/RL">https://www.fao.org/faostat/en/#data/RL</a>)</li> <li>2) FAOSTAT- Share of employment in agriculture (% of total employment) &amp; Share of female employment in agriculture (% of employment in agriculture) (<a href="https://www.fao.org/faostat/en/#data/OE">https://www.fao.org/faostat/en/#data/OE</a>)</li> <li>3) Agriculture, forestry, and fishing, value added (constant 2015 US \$) –Latin America &amp; Caribbean (<a href="https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart">https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart</a>)</li> <li>4) FAOSTAT-Government Expenditure-Share of Total Expenditure-Central Government (<a href="https://www.fao.org/faostat/en/#data/IG">https://www.fao.org/faostat/en/#data/IG</a>)</li> <li>5) FAOSTAT-Trade-Crops and livestock products-Import / Export Value-Agricultural Products (<a href="https://www.fao.org/faostat/en/#data/TCL">https://www.fao.org/faostat/en/#data/TCL</a>)</li> <li>6) Gran Plan Nacional Agropecuario 2016-2020 (<a href="http://faolex.fao.org/docs/pdf/gua201304.pdf">http://faolex.fao.org/docs/pdf/gua201304.pdf</a>)</li> <li>7) MISIÓN FAO / PMA DE EVALUACIÓN DE COSECHA Y SEGURIDAD ALIMENTARIA EN GUATEMALA, 2010 (<a href="https://www.fao.org/3/ak344s/ak344s00.htm">https://www.fao.org/3/ak344s/ak344s00.htm</a>)</li> <li>8) Guatemala meeting presentation –FANTA Project, 2016, FAO (<a href="https://www.fantaproject.org/sites/default/files/Ramirez-Maradiaga-ppt-feb2016.pdf">https://www.fantaproject.org/sites/default/files/Ramirez-Maradiaga-ppt-feb2016.pdf</a>)</li> <li>9) Política Agropecuaria 2016-2020 (<a href="https://www.maga.gob.gt/download/politica-16-20.pdf">https://www.maga.gob.gt/download/politica-16-20.pdf</a>)</li> <li>10) COVID-19 Impact on Guatemalan Agriculture, 2020, FAS (<a href="https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=COVID-19%20Impact%20on%20Guatemalan%20Agriculture_Guatemala%20City_Guatemala_06-11-2020">https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=COVID-19%20Impact%20on%20Guatemalan%20Agriculture_Guatemala%20City_Guatemala_06-11-2020</a>)</li> <li>11) COVID-19 y variabilidad climática, una combinación crítica para el sector agropecuario de Guatemala, 2020, CGIAR (<a href="https://cgspage.cgiar.org/bitstream/handle/10568/113647/Reporte%20final_An%3a1lisis%20COVID%20en%20el%20agro%20de%20Guatemala_May4.pdf?sequence=4&amp;isAllowed=y">https://cgspage.cgiar.org/bitstream/handle/10568/113647/Reporte%20final_An%3a1lisis%20COVID%20en%20el%20agro%20de%20Guatemala_May4.pdf?sequence=4&amp;isAllowed=y</a>)</li> </ol> |

### 11.3.4 Private sector

Guatemala has the fourth largest economy in the region, but its GDP per capita is low (17<sup>th</sup>). Although the unemployment rate is very low, the informal worker rate is high, and it is considered that employment opportunities are secured by informal employment. In addition, the high minimum wage per capita GDP may be one of the reasons why there are many informal workers.



|              | Index                         | Value  | Ranking                 | Year | Source             |
|--------------|-------------------------------|--------|-------------------------|------|--------------------|
| Productivity | GDP per capita (USD)          | 4,603  | 17 (Among 22 countries) | 2020 | World Bank         |
|              | GDP per worker (USD)          | 21,379 | 12 (Among 18 countries) | 2019 | World Bank         |
| Employment   | Minimum wage (USD / month)    | 347    | 9 (Among 23 countries)  | 2019 | ILO                |
|              | Unemployment rate             | 2.25   | 2 (Among 22 countries)  | 2019 | Statista           |
|              | Female unemployment rate      | 3      | 2 (Among 22 countries)  | 2019 | The Global Economy |
|              | Youth unemployment rate       | 4.99   | 3 (Among 22 countries)  | 2019 | Statista           |
|              | Undercomplete employment rate | 12.5   | 9 (Among 18 countries)  | 2019 | ILO                |
|              | Informal worker rate          | 79     | 9 (Among 12 countries)  | 2019 | CEPAL              |

Source: Described in the table



Source: World Bank, ILO, The Global Economy, etc.

### 11.3.5 Environment / disaster prevention

|             | item                        | data   | remarks                                      |
|-------------|-----------------------------|--|--|
| environment | Environmental agency        | Ministerio de Ambiente y Recursos Naturales    |  |
|             | Waste-related organizations | Municipalities                                 |  |
|             | Environmental Budget (USD)  | 2019: 22,132,500<br>2020: 15,267,200<br>2021:- | Average: 7 <sup>th</sup> out of 23 countries |

|                     |  |   |                                      |
|---------------------|--|---|--------------------------------------|
|                     |  | Three-year average:<br>18,699,850   |                                      |
|                     | Environmental budget per capita (2019-2021 average, USD) | 0.7   | 14 <sup>th</sup> out of 23 countries |
|                     | Budget ratio to national budget (2019)                   | ————  |                                      |
|                     | Donor support status                                     | 17 cases  | As of May 2021                       |
|                     | Renewable energy power generation (GWh) (2019)           | 413   | IRENA, 2021                          |
|                     | Geothermal power generation capacity (Mwe)               | 2020: 52<br>2025 Forecast: 95   | WGC, 2020                            |
| Disaster prevention | Disaster prevention organization                         | The National Coordinator for Disaster Reduction (CONRED)                                  |                                      |
|                     | Donor support status                                     | 5 cases   | As of May 2021                       |
|                     | Number of natural disasters (2010-2020)                  | 21 cases<br>Major disasters: floods, storms, landslides, volcanoes, earthquakes, droughts |                                      |
|                     | Number of victims (persons) per 100,000 population       | 35,112 people   | 3 <sup>rd</sup> out of 23 countries  |

Source: Survey Team

### 11.3.6 Governance and citizen security

| Item   | Overview  |
|--|---|
| Political system                                 | Presidential Republic   |
| Election system                                  | Almost free elections are held on a regular basis.<br>The president and vice president are elected by an absolute majority general direct election. |
| Legislative system                               | Unicameral parliament   |
| Most recent / next legislative election          | June 16, 2019 (Next time is scheduled for June 2023)  |
| Judicial system<br>Appointment and term of judge | The Supreme Court is appointed by Parliament from among the candidates recommended by the Nominating Committee, an independent body.                |
| Political stability                              | Gradually improved over the last 10 years   |
| “Worldwide Governance Indicators”                | All indicators of governance are below the regional average. Above all, the indicators of “control of corruption” and “rule of law” are weak.       |

| Indicator   | Country                     | Year | Percentile Rank (0 to 100) |
|---|-----------------------------|------|----------------------------|
| Voice and Accountability                              | * Latin America & Caribbean | 2010 | 60                         |
|   |                             | 2019 | 60                         |
|   |                             | 2020 | 60                         |
|   | Guatemala                   | 2010 | 40                         |
|   |                             | 2019 | 40                         |
|   |                             | 2020 | 40                         |
| Political Stability and Absence of Violence/Terrorism | * Latin America & Caribbean | 2010 | 60                         |
|   |                             | 2019 | 60                         |
|   |                             | 2020 | 60                         |
|   | Guatemala                   | 2010 | 20                         |
|   |                             | 2019 | 20                         |
|   |                             | 2020 | 20                         |
| Government Effectiveness                              | * Latin America & Caribbean | 2010 | 60                         |
|   |                             | 2019 | 60                         |
|   |                             | 2020 | 60                         |
|   | Guatemala                   | 2010 | 20                         |
|   |                             | 2019 | 20                         |
|   |                             | 2020 | 20                         |
| Regulatory Quality                                    | * Latin America & Caribbean | 2010 | 60                         |
|   |                             | 2019 | 60                         |
|   |                             | 2020 | 60                         |
|   | Guatemala                   | 2010 | 40                         |
|   |                             | 2019 | 40                         |
|   |                             | 2020 | 40                         |
| Rule of Law   | * Latin America & Caribbean | 2010 | 60                         |
|   |                             | 2019 | 60                         |
|   |                             | 2020 | 60                         |
|   | Guatemala                   | 2010 | 20                         |
|   |                             | 2019 | 20                         |
|   |                             | 2020 | 20                         |
| Control of Corruption                                 | * Latin America & Caribbean | 2010 | 60                         |
|   |                             | 2019 | 60                         |
|   |                             | 2020 | 60                         |
|   | Guatemala                   | 2010 | 20                         |
|   |                             | 2019 | 20                         |
|   |                             | 2020 | 20                         |

|                                   |   |
|-----------------------------------|---|
| Global freedom status             | 52/100 points (citizen rights: 21/40 points, political rights: 31/60 points)<br>Classified as “partially free country” (Freedom House 2021)   |
| Corruption Perception Index (CPI) | 149/180 <sup>th</sup> place, 25/100 points (Transparency International 2020)  |
| E-government development index    | Delayed in both telecommunication infrastructure and human capital. Although a digital national ID has been issued, about 20% of the people are not given the national ID itself.   |
| Rule of law                       | According to WGI, the level of “rule of law” is very poor.  |
| Citizen security                  | Although crime rates have fallen by 14.1% over the last decade, security issues remain a major challenge. Although the homicide rate is lower than in Central American countries, it is still very high compared to the world average. The homicide rate in 2018 was 22.5 / 100,000 (28.1 in Central America and 5.8 in the world in the same year) (UNODC 2021). |

Source: Survey Team

### 11.3.7 DX / Innovation

|   |   |   |
|---|---|---|
| Basic indicators and statistics   | E-Government Ranking 1): 121 <sup>st</sup>        | Radar chart of e-government ranking<br> |
|   | Mobile connection index 2): 55.6                  |   |
|   | Network Infrastructure Index: 57.5                |   |
|   | Internet user rate 65.0                           |   |
|   | Mobile connection rate 114.7                      |   |
|   | Fixed broadband rate 3.1                          |   |
|   | Increasing rate of Internet users 1.9 (2021/2020) |   |
| Communication network   |   |   |
| Cumulative public investment in Guatemala’s telecommunications infrastructure (per capita) for 10 years from 2008 was \$ 0.3 million, with neighboring countries Mexico (75 USD million), Costa Rica (612 USD million) and Panama (231 USD). Due to the extremely low investment policy compared to million) and Honduras (2 USD million), the fixed line penetration rate 4) is 12.7%, which is lower than the Latin American and Caribbean average of 15%. While the benefits of public investment are small, the cumulative private investment in the mobile sector3) is active at 348 USD million, and inevitably many rural areas are predominantly mobile services rather than fixed lines. However, although the penetration rate of mobile lines5) in 2010 was 123%, the penetration rate of smartphones that can support mobile broadband is as low as 5.4%, and mobile operators have to be cautious about introducing LTE services in other countries. The development of mobile |   |   |

broadband has been delayed compared to. Submarine cables on the Pacific side (SPSC6) and Caribbean side (AURORA Cable System7) are scheduled to be completed by 2022, and it is expected that the spread of fixed broadband services and mobile broadband services will be improved by improving this international connectivity. Will be done. The mobile market 8) is an oligopoly by América Móvil (Claro 48%) and Millicom (Tigo 52%), accounting for 90% of telephone lines.

#### National Strategy for Digital Transformation

As a national strategy of ICT, the National Development Plan 20329) (NDP) has two action plans for pursuing “people’s well-being”, which is one of the pillars. 1) Eliminate digital gaps within public institutions to improve and accelerate processes and transactions, 2) Design, approve and implement digital inclusion policies.

Digital Agenda 10) (DA) contributes to the development of national education, health, security, judicial services, and government digital functions, with innovation, research, development, and information security as the four axes, and benefits the people of Guatemala. To promote the use of ICT for the sake of.

As a related policy, the National Policy for Science and Technology Development 2015-203211) aims to generate creativity and encourage interdisciplinary research in science and innovation.

The national policy on cybersecurity12) aims to create conditions for participation and development in cyberspace, with the pillar of building cybersecurity that deepens cooperation with the governments of other countries.

The government also established the Deputy Department for Registry (now GAE: Presidential Commission for E-Government 13) in 2019 to digitize the services of the Ministry of Economy.

#### Characteristic efforts

As a measure against COVID-19 in the telecommunications sector, mobile operators Claro and Tigo are collaborating to provide users with additional free talk time and capacity (GB) and to keep emergency numbers free. Announced 14). In addition, the paid fixed Internet plan can be moved to the basic navigation plan, and general users can access the emergency number and the official government website for free.

Restrictions on movement by COVID-19 disrupt Guatemala’s food supply routes and are devastating to the lives of the most vulnerable groups in the country. The World Bank’s DIGITAGRO Pilot15), which was launched with the support of the InfoDev Trust Fund before the pandemic, is developing digital tools to help farmers in the country. A technology designed to improve access to the program (e-commerce platform), but in Guatemala, including adaptation to a wider agricultural market to address food supply and demand mismatches caused by pandemics. It may be expanded with the support of the agricultural sector.

#### Source

60. E-Gov-Index: a composite indicator that consists of three indexes (Online Service Index, Telecommunication Infrastructure Index and Human Capital Index), which are equally weighted. It ranges from 0 to 1, with 1 being the most developed.
61. Mobile Connectivity Index: an input index developed by GSMA to measure the performance against the four key enablers of mobile internet adoption – infrastructure, affordability, consumer readiness and content. (<https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2016/06/Mobile-Connectivity-Launch-Report.pdf>)
62. Digital Transformation: Infrastructure Sharing in Latin America and the Caribbean <https://publications.iadb.org/publications/english/document/Digital-Transformation-Infrastructure-Sharing-in-Latin-America-and-the-Caribbean.pdf>
63. Fixed telephone subscriptions (per 100 people) –Latin America & Caribbean, Guatemala <https://data.worldbank.org/indicator/IT.MLT.MAIN.P2?locations=ZJ-GT>
64. Mobile cellular subscriptions (per 100 people)-Latin America & Caribbean, Guatemala <https://data.worldbank.org/indicator/IT.CEL.SETS.P2?locations=ZJ-GT>
65. Mistral / SPSC cable is ready for service <https://www.submarinetworks.com/en/systems/brazil-us/pacific/mistral-spssc-cable-is-ready-for-service>
66. AURORA Cable System <https://www.submarinemap.com/submarine-cable/aurora-cable-system>
67. PANORAMA DE MERCADO – GUATEMALA <https://www.telesemana.com/panorama-de-mercado/guatemala/>
68. National Development plan (NDP) K’atun, Nuestra Guatemala 2032 <http://observatorioplanificacion.cepal.org/sites/default/files/plan/files/GuatemalaPlanNacionaldeDesarrollo2032.pdf>
69. Digital Nation 2016-2032 <https://1e8q3q16vyc81g8l3h3md6q5f5e-wpengine.netdna-ssl.com/wp-content/uploads/2018/04/Agenda-Digital-Guatemala-propuesta-equipo-impulsor-2015.pdf>
70. National Policy of Scientific and Technological Development 2015-2032 [https://siteal.iiep.unesco.org/sites/default/files/sit\\_accion\\_files/gt\\_5048.pdf](https://siteal.iiep.unesco.org/sites/default/files/sit_accion_files/gt_5048.pdf)
71. 2018 National Policy of Cybersecurity <https://iup.mingob.gob.gt/wp-content/uploads/2019/03/Estrategia-Nacional-de-Seguridad-Cibern%C3%A9tica.pdf>
72. Comisión Presidencial de Gobierno Abierto y Electrónico <https://transparencia.gob.gt/>
73. LAS OPORTUNIDADES DE LA DIGITALIZACION EN AMERICA LATINA FRENTE AL COVID-19 [https://repositorio.cepal.org/bitstream/handle/11362/45360/4/OportDigitalizaCOVID-19\\_es.pdf](https://repositorio.cepal.org/bitstream/handle/11362/45360/4/OportDigitalizaCOVID-19_es.pdf)
74. Aprovechar la tecnología para apoyar al sector alimentario en Guatemala durante la COVID-19 <https://blogs.worldbank.org/es/latinamerica/aprovechar-la-tecnologia-para-apoyar-al-sector-alimentario-en-guatemala-durante-la>

## 11.3.8 Infrastructure and Energy

| Transport                  |  |
|----------------------------|--|
| Overview                   | Inland transportation is mainly by car. The main public transportation is buses and taxis. There is a BRT system in Guatemala City as part of the Transmetro. There are several domestic air routes. The railroad was 784km, but it is not currently in operation. |
| Leadership governance      | Ministry of Communications, Infrastructure and Housing   |
| Major development partners | JICA / UNDP / IADB   |
| Energy and electricity     |  |
| Overview                   | Guatemala is an oil-producing country, but it is also an oil-importing country due to  |

|   |  |
|---|--|
|   | its low production volume.<br>The energy self-sufficiency rate is 66% in 2019. Imported coal and oil will account for 40% of the electricity energy mix in 2019.   |
| Carbon neutral national plan              | Guatemala Low Emissions Development Strategic Plan<br>Target: Reduce emissions by 11-22% by 2030 (NDC), N/A by 2050  |
| Leadership governance and utility company | Ministry of Energy and Mines / National Electricity Commission (CNEE)<br>EEGSA (Empresa Eléctrica de Guatemala SA), DEORSA (Distribuidora de Electricidad de Oriente SA), and DEOCSA (Distribuidora de Electricidad de Occidente SA) |
| Major development partners                | JICA / UNDP / IADB / USAID / GIZ   |

Source: JICA Study Team with reference to various websites of the government organization and international organization (WB / IEA / IRENA / US DOE).

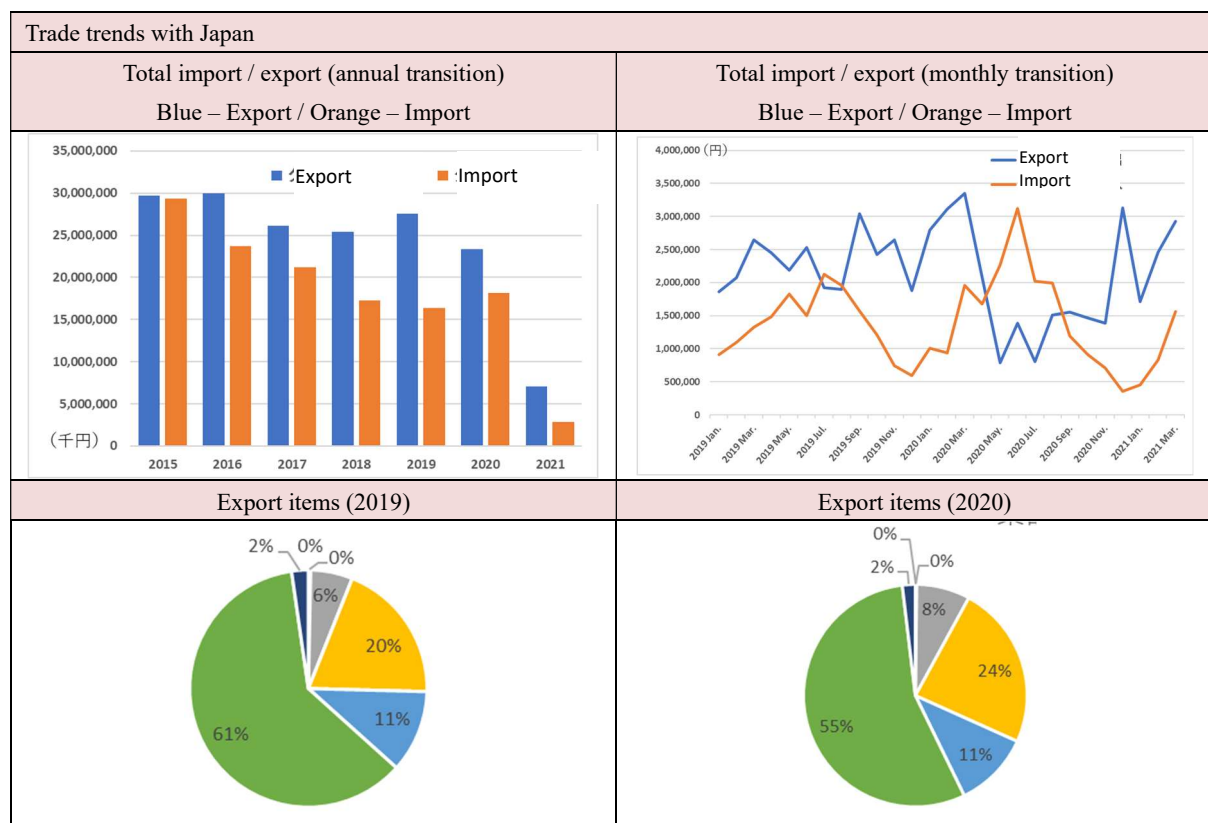
### 11.3.9 Tourism

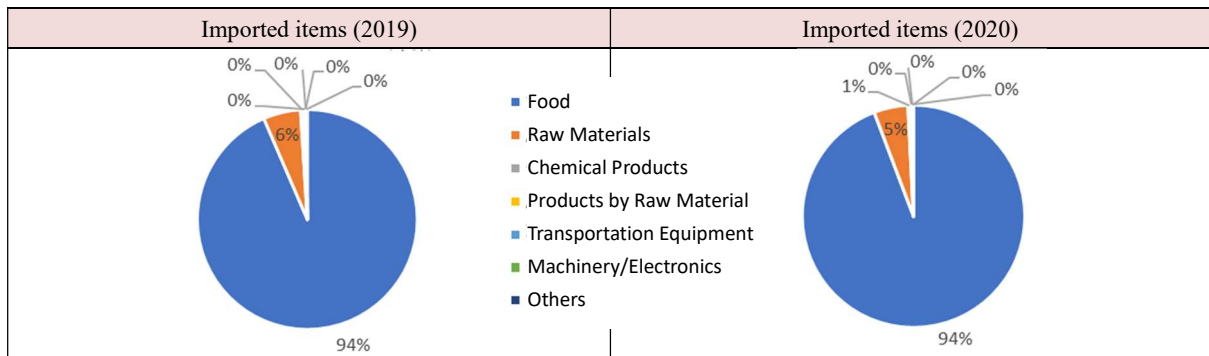
|  |  |  |
|--|--|--|
| Number of international tourist arrivals (2019)              |  | 1,752,000  |
| International Tourism Receipts (2019)                        |  | USD 1,221 million  |
| Tourism Competitiveness Ranking (2019)                       |  | 3.4 out of 7 (99 <sup>th</sup> out of 140 countries)<br>Highly rated field: Price competitiveness (5.7 out of 7 points, 33 <sup>rd</sup> out of 140 countries)<br>Low evaluation field: Safety and security (4.0 out of 7 points, 129 <sup>th</sup> out of 140 countries)  |
| Tourism Dependency Index (2019)                              |  | 8.2 (97 <sup>th</sup> out of 166 countries)  |
| Government of Japan policy                                   | Number of JICA projects in the last 10 years   | 2 cases<br><ul style="list-style-type: none"> <li>• Technical cooperation (Tourism Autonomy Management Committee Capacity Building Project)</li> <li>• Grassroots technical cooperation (Human Resources Development and Organization Support Project in the Tourism Corridor to Tikal National Park)</li> </ul> |
|  | References to the Country Assistance Policy  | Yes (“To correct disparities and promote sustainable economic growth”<br>Needs to improve agricultural productivity and raise the income of the poor by promoting small and medium-sized enterprises, especially in rural areas where there are many poor people.)   |
|  | Interest in pilot projects   | N / A  |
| Tourism industry vulnerability                               | Contribution of Travel & Tourism to GDP (2019)   | 6.2% (21 <sup>st</sup> out of 23 countries)  |
|  | Contribution of Travel & Tourism to employment (2019)  | 6.5% (21 <sup>st</sup> out of 23 countries)  |
|  | Ratio of international spending (2019)   | 36% (19 <sup>th</sup> out of 23 countries)   |
|  | Top 3 countries of origin of visitors (2019)   | El Salvador (44.82%)<br>USA (17.91%)<br>Honduras (7.24%)   |
| Importance of tourism  | Ratio of the budget amount of tourism-related ministries to the national budget amount (2019)            | N / A  |
|  | Whether or not it is mentioned as a priority sector in the National Economic and Social Development Plan | Yes<br>Plan name: Plan Nacional de Desarrollo. K’atun Nuestra Guatemala 2032<br>Reference example: Inversión extranjera directa (IED), remesas familiares y turismo: factores importantes para el crecimiento económico del país (p.210)   |
|  | Existence of effective national tourism policies / strategies / plans                                    | Yes (Plan Estratégico 2017-2024 Instituto Guatemalteco de Turismo)   |
| Impact of COVID-19   | Changes in the contribution of Travel & Tourism to GDP (2019 → 2020)                                     | -54.7% (15 <sup>th</sup> out of 23 countries)  |
|  | Changes in the contribution of Travel & Tourism to employment (2019 → 2020)                              | -25.7% (15 <sup>th</sup> out of 23 countries)  |
| Number of government support measures for the tourism sector |  | 16 (Fiscal policy: 3, monetary policy: 6, employment and skills: 1, public-private partnership: 1, resumption of tourism: 4, domestic travel: 1)   |

Source: Survey Team

### 11.3.10 Public-private partnership

|  | item   | Contents         |
|--|--|------------------|
| No. of JICA Public-Private Partnership Projects (After 2012)                 | Cooperation preparatory survey (overseas investment and financing) (former PPP infrastructure project)           | 0 cases          |
|  | Overseas investment and loan   | 0 cases          |
|  | SME Partnership Promotion Survey (support for Small-sized Enterprise)  | 0 cases          |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for small- and medium- sized enterprise) | 0 cases          |
|  | SDGs Business Verification Survey with Private Sector (support for small- and medium- sized enterprise)          | 0 cases          |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for large enterprise)                    | 0 cases          |
|  | SDGs Business Verification Survey with Private Sector (support for large enterprise)                             | 0 cases          |
| Total number of Japanese private companies entering the market (2019 survey) | Total number of business locations   | 23 companies     |
|  | Overseas branches of Japanese companies,   | 8 companies      |
|  | Local corporations wholly owned by Japanese companies and their branches   | 2 companies      |
|  | Branch offices wholly owned by Japanese companies and their branches   | 6 companies      |
|  | joint ventures (local corporations in which Japanese companies have a direct or indirect stake of 10% or more)   | 3 companies      |
|  | joint ventures (Branch offices in which Japanese companies have a direct or indirect stake of 10% or more)       | 1 company        |
|  | companies established overseas by Japanese nationals (in which Japanese nationals have a stake of 10% or more)   | 3 companies      |
| Unknown classification   | 0 companies  |                  |
| Number of Japanese residents (2020 survey)                                   | Total  | 384 people       |
|  | Long-term residents  | 249 people       |
|  | Permanent resident   | 135 people       |
| Business Environment   | Doing Business 2020 Rank   | 96 <sup>th</sup> |
| PPP Project  | Existence of PPP law scheme  | ○                |
|  | PPP project with Japanese companies  | 0 cases          |





Gathering information about the PPP system

| N°  | Task Item   | Inquiries/comments/status<br>Title of submitted file  | Source/URL  |
|-----|---|---|---|
| 1   | <b>PRIORITY 4_PPP Sector</b>  |   |   |
| 1.1 | PPP Projects in selective countries<br>PPP rules and regulations in Central America and Caribbean Countries |   | All below can be useful   |
| A   | PPP laws and Regulations<br>if there is any, when, and how  | - Law of alliances for the development of economic infrastructure.<br><br>- Regulation of the Law of Alliances for the Development of Economic Infrastructure   | <a href="https://drive.google.com/file/d/1fxy7vSW0xaZjakkXeXa8KeScq9aDT1hx/view">https://drive.google.com/file/d/1fxy7vSW0xaZjakkXeXa8KeScq9aDT1hx/view</a><br><br><a href="https://drive.google.com/file/d/1WaVvJK6_BH3IW2jPXbs8oYucxSnDb4nL/view">https://drive.google.com/file/d/1WaVvJK6_BH3IW2jPXbs8oYucxSnDb4nL/view</a>  |
| B   | PPP Unit Organization<br>if there is any, how structured  | National Council of Alliances for the development of economic infrastructure  | <a href="https://anadie.gob.gt/conadie/">https://anadie.gob.gt/conadie/</a>   |
| C   | PPP sectors<br>In what sectors are the PPPs allowed   | Intended for the creation, construction, development, use lization, use, maintenance, modernization and expansion of infrastructure, highways, highways, ports, airports, electric and railway generation, conduction and commercialization projects, including the provision of the necessary equipment for compliance with this Law and its regulations. Likewise, the provision of associated services and others complementary to these. It will not be applicable to infrastructure in education, health and water.<br>(Article 2 - Law of alliances for the development of economic infrastructure - page 13)   | <a href="https://drive.google.com/file/d/1fxy7vSW0xaZjakkXeXa8KeScq9aDT1hx/view">https://drive.google.com/file/d/1fxy7vSW0xaZjakkXeXa8KeScq9aDT1hx/view</a>   |
| D   | Proposal Types (Solicited or Unsolicited)<br>unsolicited  | It is not mentioned in the law and regulations, an initiative by the private sector to promote public-private associations.<br><br>It is highlighted that for all requirements it starts from the state:<br>All partnership projects for the development of economic infrastructure will be preceded by the requirement and written authorizations from the contracting institution of the State by its superior authorities and submitted for consideration and approval by the Council of the agency.<br>(Article 135- Law of alliances for the development of economic infrastructure - page 29)<br><br>There is an example of an Unsolicited APP like the Xacbal Hydroelectric Plant (link of the World Bank) | <a href="https://drive.google.com/file/d/1fxy7vSW0xaZjakkXeXa8KeScq9aDT1hx/view">https://drive.google.com/file/d/1fxy7vSW0xaZjakkXeXa8KeScq9aDT1hx/view</a><br>- <a href="https://ppi.worldbank.org/en/snapshots/project/xacbal-hydroelectric-plant-4891">https://ppi.worldbank.org/en/snapshots/project/xacbal-hydroelectric-plant-4891</a>  |
| E   | PPP Forms<br>BOT,BTO,DB,,,what form are allowed   | It does not specify modality for the development of the contract of the private public association.<br>But, any form is allowed looking all the PPP forms in the database of the WorldBank<br>See file "210520_PPP Database" sheet "Resume PPP"   | <a href="https://ppi.worldbank.org/en/visualization/#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true">https://ppi.worldbank.org/en/visualization/#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true</a> |
| F   | PPP types<br>Availability payment, service purchase   | There is information about APPs that are self-financed like the news in the link  | <a href="https://www.bnamericas.com/es/noticias/guatemala-lanza-licitacion-por-primer-proyecto-de-app1">https://www.bnamericas.com/es/noticias/guatemala-lanza-licitacion-por-primer-proyecto-de-app1</a>   |
| G   | PPP Project Trends<br>how much PPP projects in the last 10 years  | 16 (2010 to 2020)<br>- Jaguar Energy Guatemala (2010)<br>- Renace SA (2012)<br>- Transportadora de Energia de Centroamerica S.A. (2013)<br>- PDHSA Small Hydro Power Plants (2014)<br>- San Antonio El Sitio Wind Power Plant (2014)<br>- Oxec Hydro Power Complex (2015)<br>- El Recreo II Hydro Power Plant (2015) and others<br>See file "210520_PPP Database"   | <a href="https://ppi.worldbank.org/en/visualization/#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true">https://ppi.worldbank.org/en/visualization/#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true</a> |
| H   | Participation of Japanese firms in PPP Projects<br>if any (check news source)                               | No information found  | <a href="https://ppi.worldbank.org/en/visualization/#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true">https://ppi.worldbank.org/en/visualization/#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true</a> |
|     | Any notable points for each country<br>if any   | - Proyectos de Asociacion Público Privada<br><br>- There was information about The cooperation Of The japanese government but not about japanese companies (page 18)  | - <a href="https://anadie.gob.gt/proyectos/">https://anadie.gob.gt/proyectos/</a><br><br>- <a href="https://www.gt.emb-japan.go.jp/oda_201804set_es.pdf">https://www.gt.emb-japan.go.jp/oda_201804set_es.pdf</a>  |

Source: Survey Team



## 12. Guyana

### 12.1 Country overview (basic information)

#### 12.1.1 Basic information

The Republic of Guyana (English: Republic of Guyana), commonly known as Guyana, is a republican nation located in the northeastern part of South America and is one of the members of the Commonwealth of Nations. It borders Suriname to the east, Venezuela to the west, Brazil to the south, and faces the Caribbean Sea and the Atlantic Ocean to the north. The capital is George Town. Guyana is the third smallest country in South America and has had territorial disputes with Venezuela since the 19<sup>th</sup> century during the British territory over Guayana Esequiva, the current territory of Guyana. It is culturally close to the Caribbean countries in Latin America and is the only country in South America where English is the official language. In the colonial era, it was called Guiana, but Guyana is its English reading. When slavery was abolished in 1834, the labor force of sugar factories was first introduced by English, Irish, Maltese, German, Portuguese from the Madeira Islands, etc. as annual servants, but eventually Indians. Introduced, about 340,000 Indian-Pakistan immigrants flowed in by 1838-1917. They became mainly farm workers after the abolition of black slaves. The main industry is agriculture, which produces rice, sugar and rum, and the mining industry, which produces bauxite and gold. Sugar accounts for 28% of the export value, and abundant timber resources are also promising. In the fishing industry, shrimp are exported to Europe. The rubber garden that flourished in the past has declined. During the time of the 7<sup>th</sup> President Jagdeo, he succeeded in reducing external debt by as much as \$ 800 million. In 2007, we introduced value-added tax, which led to more efficient tax collection. Crude oil was discovered by ExxonMobil in 2015 and began mining offshore oil fields 200 kilometers offshore on December 20, 2019. Previously, it was one of the poorest countries in South America with a per capita gross domestic product (GDP) of about \$ 5,000, but the International Monetary Fund (IMF) will quadruple in oil field income in 2024 to become the richest country in South America. ) Is predicting.

#### 12.1.2 General circumstances

|             |  |                 |  |
|-------------|--|-----------------|--|
| 1 area      | 215,000 square kilometers (slightly smaller than Honshu) | 2 Population    | 782,000 (World Bank 2019)  |
| 3 Capital   | Georgetown   | 4 ethnic groups | East Indian (39.8%), African (29.3%), mixed race (19.9%), indigenous people (10.5%), others (0.5%) |
| 5 languages | English (official language), Guyanese Creole, etc.       | 6 religion      | Christianity, Hinduism, Islam, etc.  |

Source: Ministry of Foreign Affairs HP Guyana Republic Basic Data

#### 12.1.3 Economic overview

|                          |  |                              |   |
|--------------------------|--|------------------------------|---|
| 1 Major industry         | Agriculture (sugar, rice, rum), mining (bauxite, gold), fishing (shrimp), textiles, oil production will start in 2020        | 2 GNI<br>3 GNI / person      | US \$ 4.05 billion (World Bank 2019)<br>US \$ 13,510 (2019) |
| 4 Economic growth rate   | 4.7% (2019 World Bank)   | 5 Unemployment rate          | 11.85% (2019) (World Bank (ILO source))                     |
| 6 Price increase rate    | 1.9% (2017 estimate), 1.3% (2018 estimate), 2.1% (2019 estimate) (IMF)   |                              |   |
| 7 Total trade amount     | Exports: US \$ 1,567 million (goods only) (2019) (WTO)<br>Imports: US \$ 3,019 million (goods only) (2019) (WTO)             |                              |   |
| 8 Major trade items      | Exports: oil, gold, bauxite, rice, sugar, alumina<br>Import: Mechanical parts, automobiles, chemicals, bulldozers            |                              |   |
| 9 Major trading partners | Exports: Canada, USA, Panama, EU, United Arab Emirates (2017, WTO)<br>Imports: USA, Trinidad and Tobago, China, EU, Suriname |                              |   |
| 10 currencies            | Guyanese Dollar (GYD)  | 11 Foreign currency reserves | na  |
| 12 National budget       | USD 1,443,451 (2019)   | 13 External debt balance     | na  |
| 14 Economic              | Agriculture and mining are the main industries, and fishing (mainly shrimp) is also thriving. Sugar, rice                    |                              |   |

|          |  |
|----------|--|
| overview | <p>and bauxite account for about 50% of the export value. In the 1980s, the economy continued to stagnate due to the decline in international prices of major export products such as sugar, rice and bauxite. In the 1990s, it achieved high growth under the economic recovery plan, but the economic situation deteriorated in 1988, and in 1999, comprehensive debt relief measures were applied as a “heavily indebted poor country (HPIC)”. Rice field.</p> <p>In recent years, it has maintained positive growth even after the global financial crisis in October 2008, and has continued to perform well since then, driven by the growth of agriculture, manufacturing, and services. In addition, significant economic growth is expected due to the discovery of new oil fields and the accompanying start of oil production. With the start of oil exports in 2020, the trade deficit will improve significantly. The Gaiana government’s economic growth forecast for 2020, announced in September of the same year, is 48.4-51.2%, which has been revised downward from the initial forecast due to the recent decline in oil prices and the economic impact of the new coronavirus. However, it is expected to maintain a high growth rate as each country falls into negative growth.</p> |
|----------|--|

Source: Ministry of Foreign Affairs HP Guyana Republic Basic Data

## 12.1.4 Country-specific development cooperation policy

### (1) Government of Japan Development Cooperation Policy by Country

**Table 12-1 Overview of Japan’s ODA to Guyana**

|                                      |   |
|--------------------------------------|---|
| 1. 1. Overview                       |   |
|                                      | Japan’s economic cooperation with Guyana began with the Grant-in-Aid for Fisheries in 1974, and in 2005 it signed a technical cooperation agreement with Japan. Japan is currently implementing technical cooperation and grant-in-aid for aid in the fields of environment and disaster prevention as one of the major donor countries.  |
| 2. 2. Aim of development cooperation |   |
|                                      | There are many island nations in the Caribbean region where the Caribbean Community (Calicom) member countries including Gaiana are located, and natural disasters such as hurricanes, earthquakes, and tsunamis occur frequently, and the sustainable use of marine biological resources is promoted. It has something in common with Japan in terms of promotion. In addition to being vulnerable to climate change and natural disasters, Calicom member countries are based on industries that have a small population and economy and are susceptible to external factors such as agriculture, fisheries, and tourism. , All 14 countries are included in the list of small island developing states published by the United Nations Secretariat. In order to overcome the vulnerabilities peculiar to small island developing states in the Calicom countries, it is necessary to cooperate by utilizing Japan’s technology and knowledge in addition to deepening bilateral relations and socio-economics of each country. It is important from the viewpoint of financial stability and sustainable growth of the entire region.                          |
| 3. 3. Basic policy                   |   |
|                                      | In the Development Cooperation Charter, even if the per capita income is at a certain level, for countries with special vulnerabilities such as small island developing states, necessary cooperation will be provided according to the actual development needs and burden capacity of each country. For the Caribbean Community (Calicom) member countries, the first is based on the Japan-Calicom Joint Ministerial Statement adopted at the 4 <sup>th</sup> Japan-Calicom Foreign Ministers’ Meeting held in November 2014. In order to “cooperate for sustainable development including overcoming vulnerabilities peculiar to small island developing states”, we will develop cooperation that makes use of Japan’s technology and knowledge. In accordance with these policies, Guyana will support the overcoming of vulnerabilities peculiar to small island developing states by supporting environmentally friendly sustainable social development and disaster prevention efforts. We also reaffirmed that we will cooperate in accordance with this policy at the 5 <sup>th</sup> Japan-Calicom Foreign Ministers’ Meeting held in September 2016. |
| 4. Priority areas                    |   |
|                                      | Environment / Disaster Prevention: Since most of the population lives in low-lying areas along the coast, we will strengthen our ability to respond to natural disasters such as high tides and floods and climate change, as well as switch to renewable energy and save energy. We will provide necessary support to overcome the vulnerabilities peculiar to small island developing states in the fields of promotion, waste management, water resource management, etc. Also pay attention to sharing knowledge with other Calicom member countries.   |

Source: Ministry of Foreign Affairs HP Guyana Country Data Collection 2017

**Table 12-2 National Development Cooperation Policy for Guyana (September 2016)**

|                                       |   |
|---------------------------------------|---|
| 3. 3. Priority field (medium goal)    |   |
| (1) Disaster prevention / environment | Since most of the population lives in low-lying areas along the coast, it is necessary to strengthen climate change measures and disaster prevention measures related to storm surges and floods, and we will continue to provide support in the future. It will contribute to this field because it is required to switch to renewable energy and promote energy saving from high power transmission and distribution loss rate and high electricity rate. |
| (3) Others                            | (1) Waste management is important from the viewpoint of promoting urban environmental conservation and flood control, and 3R (reduction of waste generation, reuse of resources and products, recycling) ) And proper waste management are required.  |

|  |   |
|--|---|
|  | (2) Guyana has vast forest resources, and introduces the Low Carbon Development Strategy (LCDS) formulated with the aim of achieving economic growth while conserving forests through the utilization of clean energy, etc. . It should be noted that in recent years, active efforts have been made in this field. |
|--|---|

Source: Survey Team

**(2) Survey on COVID-19 by development partners**

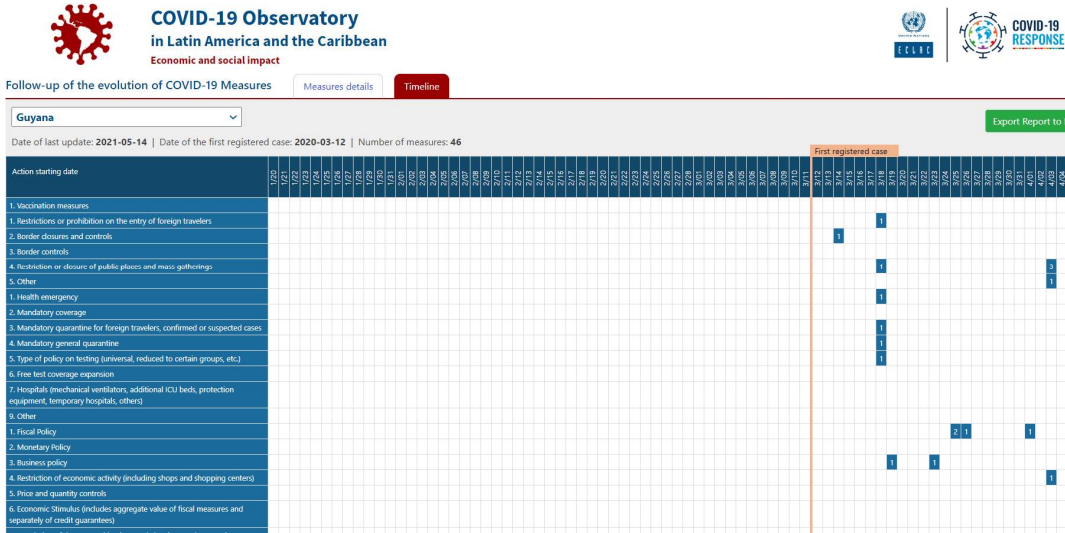
We extracted sector names and specific quantitative figures that have a large impact on the country-specific analysis described in various reports of development partners. Reports from the World Bank, OECD, BCIE, SICA, and the Ministry of Economy, Trade and Industry of Japan suggest the importance of introducing digitalization and innovation (Fintech, Aggrotech, Autotech, etc.), and incorporate the survey results of these development partners. I arranged it accordingly.

World Bank: “Growth and Revitalization” 2021 Semi-Annual Economic Report (March 2021)

- ✓ OECD: COVID-19 in LAC, Regional socio-economic implications and policy priorities (December 2020)
- ✓ BCIE: Impacto Económico del COVID-19 (April 2020)
- ✓ SICA: Estimación del Impacto Económico del COVID-19 en Centroamérica y República Dominicana (April 2020)
- ✓ Ministry of Economy, Trade and Industry of Japan: “Economic and Industrial Policy Based on the Impact of the New Corona Virus” (June 2020), Accelerating Digitization and Onlineization, Gig Economy, Innovation in the Transition to a New Everyday Life 1) Medical care / health, 2) Digital: Infrastructure development premised on the arrival of a digital society, 3) Green: Response to climate change problems, Energy security, 4) Emphasizes resilience.

**12.1.5 Policies for COVID-19 measures taken by governments of each country**

Various policies for COVID-19 taken by the government are described on the ECLAC homepage “COVID-19 Observatory” by country, time series, and field, and can be analyzed.



Source : <https://cepalstat-prod.cepal.org/forms/covid-countrysheet/index.html?table=2&country=GUY>

In this survey, the 23 policies implemented in Guyana listed on this website were classified by sector as much as possible.

**1) Infection spread and alleviation of aggravation and death**

No material was available.

## 2) Support for affected industries and people

**Table 12-3 Support for Affected Industries and People (Guyana)**

| Various government policies (COVID-19 Observatory for LAC) |    |  |  |
|--|----|--|--|
| Socioeconomic policy                                       | 7  |  |  |
| Health care & nutrition                                    | 3  |  |  |
| Education  | 1  |  |  |
| Agriculture & rural development                            | 0  |  |  |
| Private sector   | 8  |  |  |
| Environment & disaster prevention                          | 0  |  |  |
| Governance and social security                             | 2  |  |  |
| DX and innovation  | 2  |  |  |
| Infrastructure & energy                                    | 0  |  |  |
| Tourism  | 0  |  |  |
| PPP  | 0  |  |  |
| Others (b)   | 0  |  |  |
| total  | 23 |  |  |

Source: Survey Team

## 3) Arrangement of various policies for COVID-19 taken by the government

COVID-19 Observatory for Latin America and Caribbean (ECLAC) organized by governments

**Table 12-4 Government-directed COVID-19 Policy Categories (Guyana)**

### Follow-up of the evolution of COVID-19 Measures

| Vaccination   | Economy  | Social protection   |
|---|--|---|
| 1. Vaccination measures   | 1. Fiscal Policy   | 1. Cash transfers (new transfers, increase in existing transfers, expansion of cash transfers to new recipients, early disbursement of transfers) |
| <b>Movements across and within countries</b>  | 2. Monetary Policy   | 2. Food transfers / In-kind transfers   |
| 1. Restrictions or prohibition on the entry of foreign travelers  | 3. Business policy   | 3. Guarantee of basic services  |
| 2. Border closures and controls   | 4. Restriction of economic activity (including shops and shopping centers)                             | <b>Education / schools</b>  |
| 3. Border controls  | 5. Price and quantity controls   | 1. Suspension of classes  |
| 4. Restriction or closure of public places and mass gatherings  | 6. Economic Stimulus (includes aggregate value of fiscal measures and separately of credit guarantees) | 2. Provision of tools for distance learning (online platforms, TV, radio, distance-learning materials)  |
| 5. Other  | 7. Regulation of the personal hygiene and cleaning products market                                     | 3. Maintenance of school feeding programme (indicating under which modalities)  |
| <b>Health</b>   | 8. Debt relief and suspension of credit payments (individuals, microentrepreneurs)                     | <b>Gender</b>   |
| 1. Health emergency   | 9. Other   | 1. Gender-based violence against women  |
| 2. Mandatory coverage   | <b>Labor</b>   | 2. Care economy   |
| 3. Mandatory quarantine for foreign travelers, confirmed or suspected cases                                   | 1. Labor Protection  | 3. Employment and income generation   |
| 4. Mandatory general quarantine   | 2. Elective work leave   | 4. Benefits, transfers and other social protection measures   |
| 5. Type of policy on testing (universal, reduced to certain groups, etc.)                                     | 3. Reduction of working hours  | 5. Women's participation in the digital era   |
| 6. Free test coverage expansion   | 4. Prohibition of dismissal from work  | 6. Other  |
| 7. Hospitals (mechanical ventilators, additional ICU beds, protection equipment, temporary hospitals, others) | 5. Other   |   |

Source: Survey Team

## 12.2 Macroeconomic analysis and selection of priority countries

### 12.2.1 Macroeconomic analysis

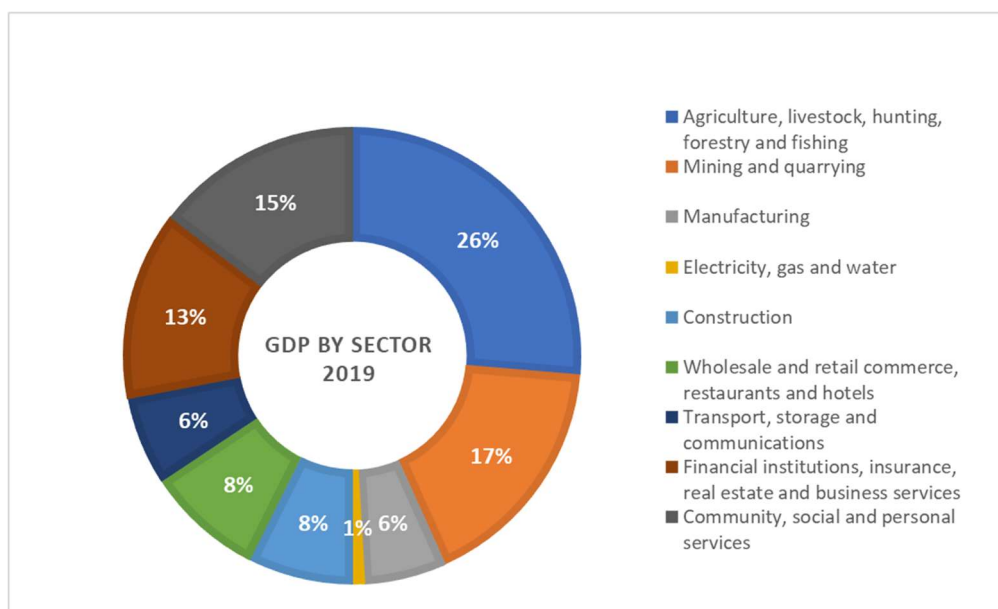
#### (1) Industrial composition

**Table 12-5 Industrial Composition (Guyana)**

Table: GDP by sector (En millones de dólares guyaneses a precios constantes de 2006)

|  | 2011    | 2012    | 2013    | 2014    | 2015    | 2016    | 2017    | 2018    | 2019a/  | 2020 b/ |
|--|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Agriculture, livestock, hunting, forestry and fishing                | 203,835 | 211,234 | 219,803 | 236,671 | 244,364 | 217,221 | 244,734 | 260,963 | 259,670 |         |
| Mining and quarrying   | 85,938  | 100,988 | 109,494 | 93,781  | 104,567 | 157,978 | 146,388 | 151,122 | 167,155 |         |
| Manufacturing  | 49,350  | 49,950  | 54,046  | 57,187  | 57,752  | 48,373  | 49,105  | 50,208  | 57,568  |         |
| Electricity, gas and water   | 5,838   | 6,461   | 6,502   | 7,042   | 6,884   | 7,669   | 7,829   | 8,111   | 8,499   |         |
| Construction   | 71,228  | 63,366  | 66,801  | 65,485  | 62,238  | 65,793  | 69,007  | 71,021  | 73,205  |         |
| Wholesale and retail commerce, restaurants and hotels                | 79,306  | 84,780  | 79,381  | 78,580  | 69,255  | 70,655  | 75,164  | 78,193  | 82,120  |         |
| Transport, storage and communications                                | 42,945  | 48,417  | 50,954  | 54,070  | 55,244  | 55,868  | 56,593  | 58,929  | 61,687  |         |
| Financial institutions, insurance, real estate and business services | 101,657 | 110,320 | 114,765 | 117,817 | 121,379 | 123,592 | 125,351 | 128,360 | 131,852 |         |
| Community, social and personal services                              | 110,324 | 113,537 | 117,903 | 122,820 | 125,943 | 130,965 | 134,637 | 137,701 | 144,270 |         |
| Total  | 750,422 | 789,053 | 819,649 | 833,452 | 847,627 | 878,112 | 908,807 | 944,608 | 986,025 | 0       |

Source: ECLAC



Source: Survey Team

## (2) Trends in major economic indicators

**Table 12-6 Trends in Major Economic Indicator (Guyana)**

Table 1 GUYANA: MAIN ECONOMIC INDICATORS (Annual growth rates)

|  | 2011    | 2012    | 2013    | 2014    | 2015    | 2016    | 2017    | 2018     | 2019a/   | 2020 b/  |
|--|---------|---------|---------|---------|---------|---------|---------|----------|----------|----------|
| Gross domestic product (Annual growth rates c/)                                      | 5.2     | 5.3     | 3.7     | 1.7     | 0.7     | 3.8     | 3.7     | 4.4      | 5.4      | 30.9     |
| Per capita gross domestic product (Annual growth rates c/)                           | 4.8     | 4.8     | 3.1     | 1.1     | 0.2     | 3.3     | 3.2     | 3.9      | 4.8      | 30.4     |
| Gross domestic product, by sector (Annual growth rates c/)                           |         |         |         |         |         |         |         |          |          |          |
| Agriculture, livestock, hunting, forestry and fishing                                | 2.8     | 3.6     | 4.1     | 7.7     | 3.3     | -11.1   | 12.7    | 6.6      | -0.5     | 4.1      |
| Mining and quarrying   | 16.4    | 17.5    | 8.4     | -14.4   | 11.5    | 51.1    | -7.3    | 3.2      | 10.6     | 303.7    |
| Manufacturing  | 6.6     | 1.2     | 8.2     | 5.8     | 1.0     | -16.2   | 1.5     | 2.2      | 14.7     | -8.6     |
| Electricity, gas and water   | 1.8     | 10.7    | 0.6     | 8.3     | -2.2    | 11.4    | 2.1     | 3.6      | 4.8      | 3.8      |
| Construction   | 2.8     | -11.0   | 5.4     | -2.0    | -5.0    | 5.7     | 4.9     | 2.9      | 3.1      | -6.3     |
| Wholesale and retail commerce, restaurants and hotels                                | 4.6     | 6.9     | -6.4    | -1.0    | -11.9   | 2.0     | 6.4     | 4.0      | 5.0      | -29.0    |
| Transport, storage and communications  | 8.5     | 12.7    | 5.2     | 6.1     | 2.2     | 1.1     | 1.3     | 4.1      | 4.7      | -17.2    |
| Financial institutions, insurance, real estate and business services                 | 3.8     | 8.5     | 4.0     | 2.7     | 3.0     | 1.8     | 1.4     | 2.4      | 2.7      | 1.2      |
| Community, social and personal services  | 1.8     | 2.9     | 3.8     | 4.2     | 2.5     | 4.0     | 2.8     | 2.3      | 4.8      | -15.7    |
| Balance of Payments (Millions of dollars)  |         |         |         |         |         |         |         |          |          |          |
| Current account balance  | -372.3  | -366.7  | -456.0  | -385.2  | -177.4  | 27.6    | -290.5  | -1,438.8 | -1,802.8 | -659.5   |
| Goods balance  | -641.4  | -581.3  | -499.8  | -624.1  | -340.3  | -30.8   | -206.6  | -1,033.1 | -1,452.1 | 514.8    |
| Exports, f.o.b.  | 1,129.1 | 1,415.5 | 1,375.1 | 1,167.2 | 1,151.3 | 1,434.4 | 1,437.3 | 1,377.1  | 1,567.0  | 2,587.4  |
| Imports, f.o.b.  | 1,770.5 | 1,996.7 | 1,874.9 | 1,791.3 | 1,491.6 | 1,465.2 | 1,644.0 | 2,410.2  | 3,019.1  | -2,072.6 |
| Services trade balance   | -136.2  | -228.6  | -338.0  | -245.4  | -282.3  | -297.3  | -354.1  | -869.7   | -885.5   | -1,824.7 |
| Income balance   | -9.3    | 24.0    | 28.5    | 26.7    | 24.7    | -4.6    | -11.5   | -27.7    | -46.6    |          |
| Net current transfers  | 414.6   | 419.2   | 353.2   | 457.6   | 420.6   | 360.3   | 281.7   | 491.7    | 581.5    | 650.4    |
| Capital and financial balance (Millions of dollars)                                  |         |         |         |         |         |         |         |          |          |          |
| Net foreign direct investment d/   | 246.8   | 293.7   | 214.0   | 255.2   | 121.7   | 6.0     | 212.2   | 1,231.8  | 1,695.4  |          |
| Other capital movements d/   | 110.5   | 105.9   | 122.5   | 13.6    | -52.0   | -87.0   | 8.8     | 74.8     | 58.4     |          |
| Foreign remittance from abroad for 2019 and 2020                                     | 388.3   | 466.1   | 410.6   | 343.9   | 146.4   | -30.2   | 266.9   | 1,355.5  | 1,803.6  |          |
| Microfinance dispatched and the sectors that received microfinance for 2019 and 2020 |         |         |         |         |         |         |         |          |          |          |

Source: Economic Survey of Latin America and the Caribbean 2020: Main conditioning factors of fiscal and monetary policies in the post-COVID-19 era

### 12.2.2 Impact analysis and identification of key sectors

#### (1) Impact assessment results for each sector by AHP analytic hierarchy process based on economic indicators

**Table 12-7 Results of Sector Impact Analysis by COVID-19 (Guyana)**

| ECLAC category   | Changes around COVID-19 | Trends before COVID-19 | Total GDP ratio of the sector | comprehensive evaluation |   |
|--|-------------------------|------------------------|-------------------------------|--------------------------|---|
| Importance (weight)  | 0.459                   | 0.066                  | 0.075                         |                          |   |
| Agriculture, livestock, hunting, forestry and fishing                | 2                       | 5                      | 9                             | 0.0427                   | 7 |
| Mining and quarrying   | 1                       | 9                      | 8                             | 0.037                    | 9 |
| Manufacturing  | 8                       | 3                      | 2                             | 0.089                    | 2 |
| Electricity, gas and water   | 3                       | 7                      | 1                             | 0.0425                   | 8 |
| Construction   | 5                       | 1                      | 4                             | 0.059                    | 6 |
| Wholesale and retail commerce, restaurants and hotels                | 9                       | 2                      | 5                             | 0.103                    | 1 |
| Transport, storage and communications                                | 7                       | 8                      | 3                             | 0.088                    | 3 |
| Financial institutions, insurance, real estate and business services | 4                       | 6                      | 6                             | 0.060                    | 5 |
| Community, social and personal services                              | 6                       | 4                      | 7                             | 0.079                    | 4 |

Source: Survey Team

#### 1) ECLAC Sector Classification Amendments to the Sector Classification

In line with the method described in the main volume, the Sector Classification is divided into the Vertical Sector and the Cross-Cutting Sector, the ECLAC classification sector is allocated to the Vertical Sector Classification, and the evaluation of various policies related to COVID-19 taken by the



government along with the results of the partner survey and the indicators of the national development cooperation policy, the ranking of priority sectors are calculated using the four indicators, which are described in the table below.

**Table 12-8 Ranking of Priority Sectors (Guyana)**

|                                   | Economic Indicator Analysis | Government Policy on COVID-19 | Survey on COVID-19 by Development Partners | Country Development Cooperation Policy |           |          |
|-----------------------------------|-----------------------------|-------------------------------|--|--|-----------|----------|
| Importance (weight)               | 0.5000                      | 0.1000                        | 0.3000                                     | 0.1000                                 | Base Case | Priority |
| Social and Economic Policy        | 0.0000                      | 0.0304                        | 0.0000                                     | 0.0000                                 | 0.0304    | ○        |
| Health and Nutrition              | 0.0345                      | 0.0130                        | 0.0000                                     | 0.0000                                 | 0.0475    | 5        |
| Education                         | 0.0271                      | 0.0043                        | 0.0000                                     | 0.0000                                 | 0.0315    | 6        |
| Agriculture and Rural Development | 0.0693                      | 0.0000                        | 0.0375                                     | 0.0000                                 | 0.1068    | 3        |
| Manufacturing                     | 0.1519                      | 0.0348                        | 0.0375                                     | 0.0250                                 | 0.2492    | 1        |
| Environment/ Disaster Management  | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0500                                 | 0.0500    | ○        |
| Governance and Security           | 0.0000                      | 0.0087                        | 0.0000                                     | 0.0000                                 | 0.00870   | ○        |
| DX Innovation                     | 0.0000                      | 0.0087                        | 0.1125                                     | 0.0000                                 | 0.1212    | ○        |
| Infrastructure and Every          | 0.1569                      | 0.0000                        | 0.0750                                     | 0.0250                                 | 0.25693   | 2        |
| Tourism                           | 0.0602                      | 0.0000                        | 0.0375                                     | 0.0000                                 | 0.0977    | 4        |
| Public-Private Partnership        | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0000                                 | 0.0000    | ○        |

Source: Survey Team

## (2) Sensitivity analysis

### 1) Analysis case settings

Based on the above methodology, the following case settings were made.

**Table 12-9 Sensitivity Analysis Case-based Weighting Settings (Guyana)**

|  | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|--|-----------|------------------------|------------------------|------------------------|
| Economic indicator analysis  | 0.6       | 0.6                    | 0.5                    | 0.5                    |
| Investigation and arrangement of various policies for COVID-19 taken by the government | 0.2       | 0.1                    | 0.1                    | 0.1                    |
| Development partner survey results   | 0.1       | 0.2                    | 0.2                    | 0.3                    |
| Country-specific development cooperation policy  | 0.1       | 0.1                    | 0.2                    | 0.1                    |

Source: Survey Team

### 2) Sensitivity analysis summary

The results of each sensitivity analysis are as summarized below. Sensitivity analysis did not show much change, which was close to the result of the base case.



**Table 12-10 Summary of Sensitivity Analysis Results (Guyana)**

|                                   | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|-----------------------------------|-----------|------------------------|------------------------|------------------------|
| Social and economic policy        |           |                        |                        |                        |
| Health care / nutrition           | 5         | 5                      | 5                      | 5                      |
| education                         | 6         | 6                      | 6                      | 6                      |
| Agriculture / rural development   | 3         | 3                      | 3                      | 3                      |
| Manufacturing industry            | 1         | 1                      | 1                      | 2                      |
| Environment / disaster prevention |           |                        |                        |                        |
| Governance and citizen security   |           |                        |                        |                        |
| DX / Innovation                   |           |                        |                        |                        |
| Infrastructure and Energy         | 2         | 2                      | 2                      | 1                      |
| sightseeing                       | 4         | 4                      | 4                      | 4                      |
| Public-private partnership        |           |                        |                        |                        |

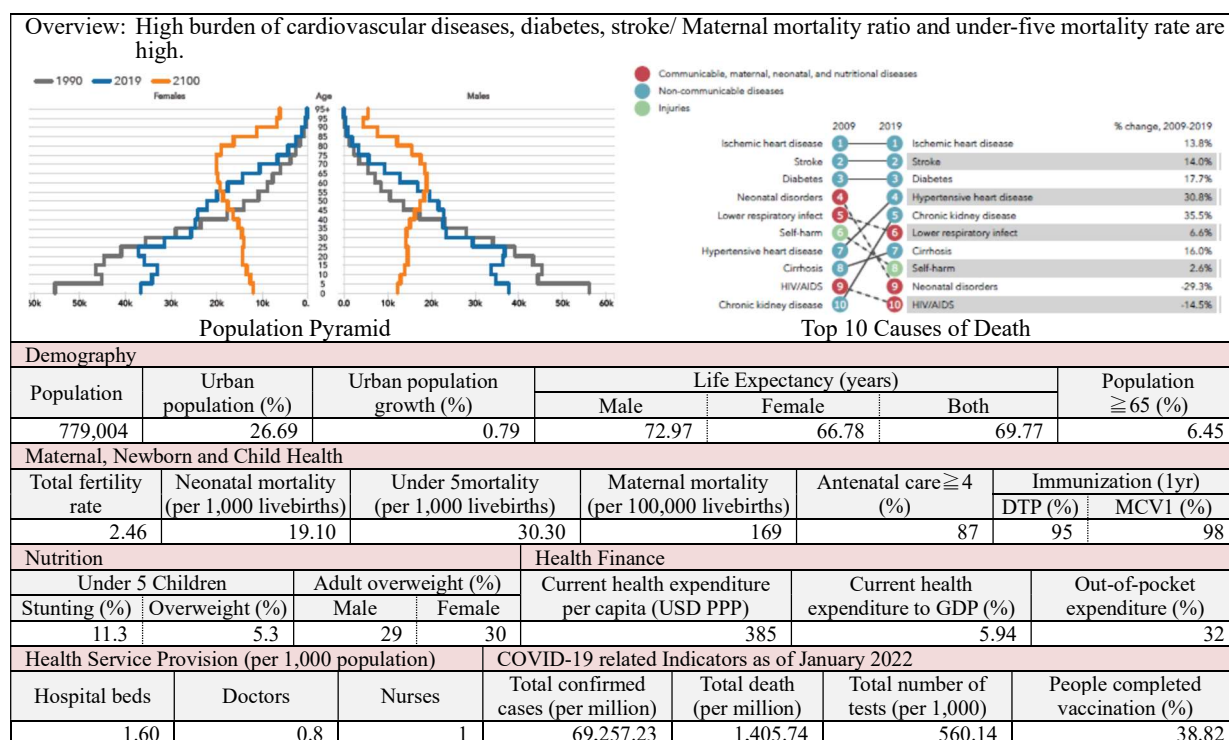
Source: Survey Team

### **(3) Selection of priority sectors by country**

From the above results, 1) social / economic policy, 2) agriculture / rural development, 3) manufacturing industry, 4) environment / disaster prevention, 5) governance / citizen security, 6) DX / innovation, 7) infrastructure / energy, 8) Public-private partnership are selected as priority sectors.

## 12.3 Country-specific information by sector

### 12.3.1 Health care / nutrition



Source: Graphs=Institute for Health Metrics and Evaluation, County Profile; Demography, Total fertility rate, Neonatal mortality, under-5 mortality, Health finance= World Development Indicators, the World Bank (Accessed on Aug 2021); Maternal mortality= UNICEF (Sep 2019); Antenatal care, Immunization, Nutrition, Health service provision,= OECD/The World Bank (2020), Health at a Glance: Latin America and the Caribbean 2020; COVID-19 related indicators= Our World in Data (Accessed on Jan 2022)

| Health                                  |  |
|---|--|
| Leadership/ Governance                  | Responsible Agency: Ministry of Health<br><a href="https://www.health.gov.gy/">https://www.health.gov.gy/</a><br>Centralized<br>Major Relevant Policies: "Health Vision 2020", A National Health Strategy for Guyana 2013-2020   |
| Service Providing System                | Public sector is the main provider.  |
| Health Finance                          | Government fund  |
| Human Resource for Health               | Under the Guyana Human Resource for Health Plan of Action for Universal Access to Health and Universal Health Coverage, 2018, efforts to reducing gaps and appropriate allocation have been continued.   |
| IT/ Digital Health                      | Information System for Health (IS4H) has been piloted to integrate fragmented health information management systems to establish "Guyana Health Information System".   |
| Drugs/ Medical Equipment                | MOH prepares recommended medical equipment lists on communicable diseases, noncommunicable diseases, and public health emergency. Also, MOH prepares medical equipment inventory.  |
| Priority                                | UHC and improvement of social determinants of health   |
| Communicable Disease Emergency Response | To fulfill the requirements of IHR, Guyana developed legislation, policy, budget and human resources framework, zoonosis prevention and control. Capacity development of quarantine, chemical and radiation emergency response, and laboratory testing is left behind. |
| Major Development Partners              | PAHO/WHO, One UN, PEPFER, involved in Caribbean Cooperation Health Initiative<br>Development cooperation seems not to be well coordinated.   |
| Nutrition                               |  |
| Institutional Arrangement               | (No information)   |
| Major Relevant Policies                 | A National Plan of Action for Nutrition, 1994  |
| Human Resource for Health               | Nutrition related degrees: No<br>Nutrition related subjects in pre-service education: Yes<br>Number of nutrition related professionals: 0.8 per 100,000 population   |

Source: Survey Team with reference to WHO Country Cooperation Strategy for Guyana at a glance, May 2016, Institute for Health Metrics and Evaluation, County Profile, WHO, Global atlas of medical devices, 2017, and WHO, Nutrition Landscape Information System (NLIS)

### 12.3.2 Education

| Overview                              |   |   |
|---------------------------------------|---|---|
| Number of children                    | N/A   |   |
| Government authority                  | Ministry of Education   |   |
| Education indicator                   | Public Education Budget 5.5% of GDP (2018) Source: UIS  |   |
| Impact of COVID-19                    |   |   |
| School closure / reopening            | From March 11, 2020 to February 2, 2021, there were 134 days of complete closure and 51 days of partial closure. In 2021, the vacation from July was extended, and from September, classes were held in a hybrid style with remote and face-to-face lessons.  |   |
| COVID-19 measures                     | N / A   |   |
| Distance education                    | Implementation status   | The Ministry of Education has set up an online platform by GPE funding to continue learning during COVID-19, and conducts interactive lessons using remote conferencing systems such as Google Classroom, Zoom, Moodle, and Teams.. Worksheets are distributed to children in the Hinterland area who cannot connect to the Internet. Also, educational programs are distributed on TV and radio. In addition, the ministry's website provides digital teaching materials for children and students with necessary information for teachers and parents. In 2021, all students were promoted to the new school year and learned on a condensed curriculum. Carried out learning evaluations for complementary learning. Distance Education Readiness Index announced by UNICEF is Level 4 "A distance learning system has been established that allows most children and students to continue learning even when schools are closed, and there are areas that need improvement, but there is resilience.. " |
|                                       | Access  | All lower and upper secondary schools, and about half of the primary schools are connected to the government network providing 10 Mbps internet. The Ministry of Education has agreed with the Guyana Telegraph Company (GTT) to provide free internet to all primary schools. However, connectivity remains an issue in remote areas (Hinterland).   |
|                                       | Teacher training  | N / A   |
| School hygiene                        | Infection control measures  | -School reopening guidelines (UNICEF support)<br>The Ministry of Education provides hygiene guidance and consideration in terms of classroom composition (number of teachers and students to keep a social distance), hygiene (hand washing), the state of existing school infrastructure, etc.   |
|                                       | Facility maintenance  | N / A   |
| School lunch / nutrition              | During the school closure, not provided school lunch services to reduce logistics problems and infection risk related to food distribution. At schools open for testing, the Ministry of Education's hot meal service was offered only to primary school children.  |   |
| Countermeasures for vulnerable people | N / A   |   |
| Support for donors, etc.              | UNICEF: Technical assistance for protocol and risk management policy development for school reopening, online teaching materials and monitoring assistance, and hygiene message delivery to 580,000 people.<br>IDB: Support for Indigenous Education at COVID-19 (i) Development and implementation of English programs as a second language for preschool indigenous children, (ii) Hinterland community school mapping, (iii) Survey on the situation of immigrant children |   |

Source: Survey Team

### 12.3.3 Agriculture / rural development

|                                |  |
|--------------------------------|--|
| Urban / rural population ratio | 26.6% / 73.4% (FAOSTAT 2018)   |
| Agricultural land area         | 1,241,250 ha (FAOSTAT 2019) 1)   |
| Agricultural sector employment | 15.9% of all employment (male / female ratio: 79.3% / 20.7%) (FAOSTAT 2019) 2) |
| Agricultural GDP               | 16.9% of total GDP (World Bank 2020)   |

|   |   |         |         |         |         |         |
|---|---|---------|---------|---------|---------|---------|
| Of the agricultural sector Value added amount     | \$ 1,205,142.38 thousand (World Bank 2020) 3) * Statistics include forestry   |         |         |         |         |         |
| Agricultural sector expenditure ratio             | Ratio of agricultural fiscal expenditure to national budget (%) 4)  |         |         |         |         |         |
|   | 2018  | 2019    | 2020    |         |         |         |
|   | 9.70  | 7.74    | 7.02    |         |         |         |
| Agricultural sector import / export balance       | Trade Balance (USD1,000 FAOSTAT) 5)   |         |         |         |         |         |
|   |   | 2015    | 2016    | 2017    | 2018    | 2019    |
|   | export  | 378,121 | 358,224 | 439,687 | 302,651 | 251,304 |
|   | Import  | 253,618 | 262,509 | 260,938 | 273,230 | 292,689 |
|   | Balance of payments   | 124,503 | 95,715  | 178,749 | 29,421  | -41,385 |
| Agricultural development Policy / plan / strategy | <p>Guyana's main crops, rice and sugar cane, drive export-oriented agriculture, most of which is produced on cultivated land designated as drainage and irrigation areas (DDI) 6). Other crops (vegetables, staple crops, fruits, spices) are currently mass-produced to meet local needs and to meet the export markets being developed in the Calicom region and beyond. The non-traditional crop and vegetable sector is growing and contributes to food production efforts through the government and the New Guyana Marketing Corporation (NGMC), which helps farmers sell their products domestically and internationally. 6).</p> <p>Guyana's Agricultural Vision is an essential tool for further development, for agriculture to continue to promote sustainable economic and social prosperity, and to move Guyana to high- and middle-income developing countries by 2025. I set it. To achieve that goal, the government has formulated a national agricultural strategy 2013-20207). This strategy is based on the "F-5" strategic approach for agriculture and covers: (A) Food Security-Eliminate Guyana's hunger and secure adequate food for all communities. (B) Fiber and nutritious foods-nutrition safety for all. (C) Fuel Production-Support the development of alternative fuel sources, reduce reliance on fossil fuels and create a bioenergy industry in Gaiana. (D) Fashion and Health Products-Establish a new agricultural processing industry in Guyana.</p> <p>The Caribbean Agricultural Research and Development Institute (CARDI), which Gaiana is a member of, is an organization that conducts research and development aimed at improving the competitiveness and sustainability of the regional agricultural sector, and is a member of the Caribbean Community (CARICOM). Established in 1974 by the national government. Headquartered in Trinidad and Tobago, it is currently based in 14 countries. To transform regional agriculture into a modernized, competitive, innovative and resilient sector, CARDI has developed a five-year roadmap, Strategic Plan 2018-20228). CARDI divides its member countries into three groups from the aspect of strategic approach according to the economic structure of each country, and Guyana belongs to the first group. These countries have the largest land area for agriculture and have considerable capacity for national research and development, so with a large production system using sufficient land resources available, It plays an important role in local food production. CARDI's intervention emphasizes this type of production, and mass-produced commodities promote the agricultural processing sector.</p> |         |         |         |         |         |
| Impact of COVID-19                                | <p>The Guyana Statistics Bureau reported that food prices rose 14% during the first seven months of 2021 9). However, in addition to COVID-19, this price increase has caused large-scale damage to the agricultural sector due to the floods that occurred in the breadbasket between May and June 2020, which seems to be a combined factor. ..</p> <p>Agro Services Inc, a bulk supplier of fruits and vegetables, claims that local farmers have become a major supplier as an alternative to supply chains with distribution problems in preparation for rising food demand during a pandemic 9). Currently, we are looking for a system to maintain the supply of fresh foods and all foods. Agriculture is challenged by the availability and high cost of input supply, and rising fuel prices are ultimately raising production costs.</p> <p>The government's response 9) from a survey conducted by the Caribbean Media Institute, an NPO, recognizes the disruption of the food supply chain, especially for value-added agricultural products (fruits, vegetables, meat, fish, milk, etc.). The restrictions on movement, including strike behavior by workers, have affected agricultural and food processing activities. Similarly, the closure of restaurants and the infrequent shopping of groceries have reduced demand for fresh and marine products, affecting producers and suppliers. In the agriculture and aquaculture industries, major impacts were observed due to restrictions on tourism, closure of restaurants and suspension of school meals.</p>  |         |         |         |         |         |
| Source / reference                                | <p>1) FAOSTAT-Land, Input and Sustainability-Land Use-Area-Agriculture (<a href="https://www.fao.org/faostat/en/#data/RL">https://www.fao.org/faostat/en/#data/RL</a>)</p> <p>2) FAOSTAT- Share of employment in agriculture (% of total employment) &amp; Share of female employment in agriculture (% of employment in agriculture) (<a href="https://www.fao.org/faostat/en/#data/OE">https://www.fao.org/faostat/en/#data/OE</a>)</p> <p>3) Agriculture, forestry, and fishing, value added (constant 2015 US \$) --Latin America &amp; Caribbean (<a href="https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart">https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart</a>)</p> <p>4) FAOSTAT-Government Expenditure-Share of Total Expenditure-Central Government (<a href="https://www.fao.org/faostat/en/#data/IG">https://www.fao.org/faostat/en/#data/IG</a>)</p> <p>5) FAOSTAT-Trade-Crops and livestock products-Import / Export Value-Agricultural Products (<a href="https://www.fao.org/faostat/en/#data/TCL">https://www.fao.org/faostat/en/#data/TCL</a>)</p> <p>6) GUYANA'S ECONOMY GREW BY 14.5 PERCENT IN FIRST HALF OF 2021, NON-OIL ECONOMY BY 4.8 PERCENT, DESPITE COVID-19 AND MAY / JUNE FLOODS (<a href="https://finance.gov.gy/guyanas-economy-grew-by-14-5-percent-in-first-half-of-2021-non-oil-economy-by-4-8-percent-despite-covid-19-and-may-june-floods/">https://finance.gov.gy/guyanas-economy-grew-by-14-5-percent-in-first-half-of-2021-non-oil-economy-by-4-8-percent-despite-covid-19-and-may-june-floods/</a>)</p>   |         |         |         |         |         |

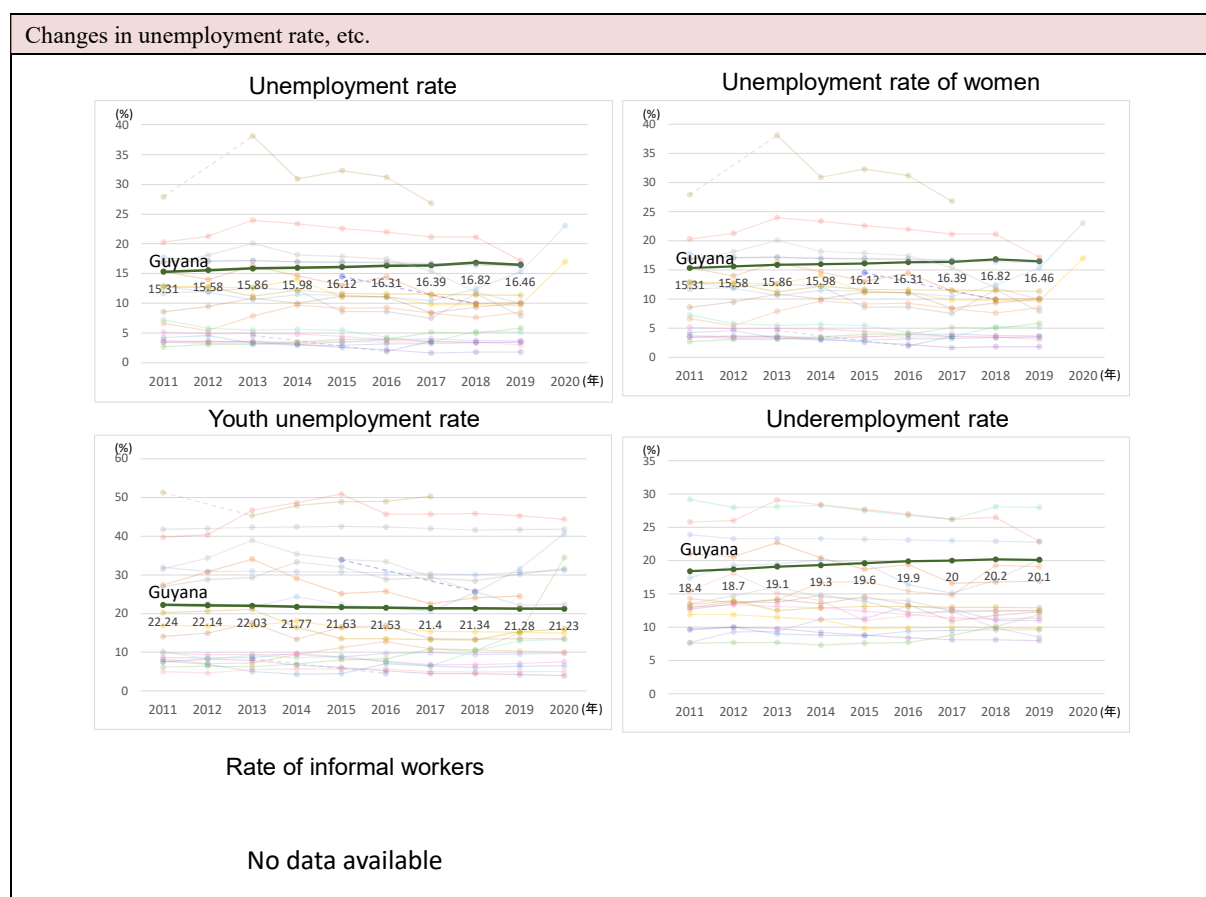
- 7) National Strategy for Agriculture in Guyana 2013-2020 (<https://www.fao.org/faolex/results/details/en/c/LEX-FAOC165953>)  
 8) CARDI Strategic Plan 2018-2022 (<http://www.cardi.org/wp-content/uploads/downloads/2018/05/CARDI-Strategic-Plan-2018-to-2022-Final.pdf>)  
 9) GUYANA, 2021, Media Institute of the Caribbean (<https://www.mediainstituteofthecaribbean.com/guyana>)

### 12.3.4 Private sector

Guyana is a country with a slightly smaller GDP per capita (13th), but a slightly higher GDP per worker (8th). The employment situation is rather poor, and there is concern that the unemployment rate, female unemployment rate, and underemployment rate are on a gradual uptrend.

|              | Index                      | Value  | Ranking                    | Year | Source             |
|--------------|----------------------------|--------|----------------------------|------|--------------------|
| Productivity | GDP per capita (USD)       | 6,956  | 13 (Among 22 countries)    | 2020 | World Bank         |
|              | GDP per worker (USD)       | 38,482 | 8 (Among 18 countries)     | 2019 | World Bank         |
| Employment   | Minimum wage (USD / month) | 203    | 15 (Among 23 countries)    | 2019 | ILO                |
|              | Unemployment rate          | 11.85  | 17 17 (Among 22 countries) | 2019 | Statista           |
|              | Female unemployment rate   | 16.46  | 19 19 (Among 22 countries) | 2019 | The Global Economy |
|              | Youth unemployment rate    | 21.28  | 13 (Among 22 countries)    | 2019 | Statista           |
|              | Underemployment rate       | 20.1   | 14 (Among 18 countries)    | 2019 | ILO                |
|              | Informal worker rate       | -----  | ----- (Among 12 countries) | ---  | -----              |

Source: Described in the table



Source: World Bank, ILO, The Global Economy, etc.

### 12.3.5 Environment / disaster prevention

|             | item                        | data  | remarks |
|-------------|-----------------------------|---|---------|
| environment | Environmental agency        | Ministry of Natural Resources                         |         |
|             | Waste-related organizations | Ministry of Local Government and Regional Development |         |

|                     |  |   |                                  |
|---------------------|--|---|----------------------------------|
|                     | Environmental Budget (USD)                               | 2019:-<br>2020:-<br>2021:-<br>3-year average:-    | not gotten                       |
|                     | Environmental budget per capita (2019-2021 average, USD) | —————   | not gotten                       |
|                     | Budget ratio to national budget (2019)                   | —————   | not gotten                       |
|                     | Donor support status                                     | 4 cases   | As of May 2021                   |
|                     | Renewable energy power generation (GWh) (2019)           | 53  | IRENA, 2021                      |
|                     | Geothermal power generation capacity (MWe)               | 2020: 0<br>2025 Forecast: 0                       | WGC, 2020                        |
| Disaster prevention | Disaster prevention organization                         | Civil Defense Commission                          |                                  |
|                     | Donor support status                                     | 2 cases   | As of May 2021                   |
|                     | Number of natural disasters (2010-2020)                  | Major disasters: floods, storm surges, high waves | (Statistical data not available) |
|                     | Number of victims (persons) per 100,000 population       | —————   | (Statistical data not available) |

Source: Survey Team

### 12.3.6 Governance and citizen security

| Item   | Overview  |
|--|---|
| Political system                                 | Parliamentary republic  |
| Election system                                  | Free and regular elections are held. Candidates nominated by the ruling party are appointed president. The prime minister is appointed by the president.  |
| Legislative system                               | Unicameral National Assembly  |
| Most recent / next legislative election          | March 2, 2020 Actual (next time is scheduled for 2020)  |
| Judicial system<br>Appointment and term of judge | The President appoints the Chief Judges of the Court of Appeals and the High Court. The other judges in both courts are appointed by the Judicial Services Commission, an organization appointed by the President.  |
| Political stability                              | Not stable. In recent years, abundant oil and natural gas have been discovered in the ocean, and the political conflict between ethnic groups that had been held for some time has reignited (Freedom House, 2021). |
| “Worldwide Governance Indicators”                | The level of "government effectiveness," "regulatory quality," and "rule of law" is particularly low. Due to the recently discovered natural resources, anti-corruption reforms are needed.                         |

|                       | Indicator   | Country                     | Year | Percentile Rank (0 to 100) |
|-----------------------|---|-----------------------------|------|----------------------------|
|                       | Voice and Accountability                              | * Latin America & Caribbean | 2010 | 60                         |
|                       |   |                             | 2019 | 60                         |
|                       |   |                             | 2020 | 60                         |
|                       |   | Guyana                      | 2010 | 50                         |
|                       |   |                             | 2019 | 55                         |
|                       |   |                             | 2020 | 55                         |
|                       | Political Stability and Absence of Violence/Terrorism | * Latin America & Caribbean | 2010 | 55                         |
|                       |   |                             | 2019 | 55                         |
|                       |   |                             | 2020 | 55                         |
|                       |   | Guyana                      | 2010 | 35                         |
|                       |   |                             | 2019 | 40                         |
|                       |   |                             | 2020 | 45                         |
|                       | Government Effectiveness                              | * Latin America & Caribbean | 2010 | 60                         |
|                       |   |                             | 2019 | 60                         |
|                       |   |                             | 2020 | 60                         |
|                       |   | Guyana                      | 2010 | 50                         |
|                       |   |                             | 2019 | 45                         |
|                       |   |                             | 2020 | 45                         |
|                       | Regulatory Quality                                    | * Latin America & Caribbean | 2010 | 60                         |
|                       |   |                             | 2019 | 60                         |
|                       |   |                             | 2020 | 60                         |
|                       |   | Guyana                      | 2010 | 35                         |
|                       |   |                             | 2019 | 40                         |
|                       |   |                             | 2020 | 45                         |
| Rule of Law           | * Latin America & Caribbean                           | 2010                        | 55   |                            |
|                       |   | 2019                        | 55   |                            |
|                       |   | 2020                        | 55   |                            |
|                       | Guyana  | 2010                        | 40   |                            |
|                       |   | 2019                        | 45   |                            |
|                       |   | 2020                        | 45   |                            |
| Control of Corruption | * Latin America & Caribbean                           | 2010                        | 60   |                            |
|                       |   | 2019                        | 60   |                            |
|                       |   | 2020                        | 60   |                            |
|                       | Guyana  | 2010                        | 40   |                            |
|                       |   | 2019                        | 50   |                            |
|                       |   | 2020                        | 55   |                            |

|                                   |   |
|-----------------------------------|---|
| Global freedom status             | 73/100 points (citizen rights: 30/40 points, political rights: 43/60 points)<br>Classified as "free country" (Freedom House 2021)   |
| Corruption Perception Index (CPI) | 83/180th place, 41/100 points (Transparency International 2020)   |
| E-government development index    | It is lower than the average level in the region, especially behind the development of online service indicators and communication infrastructure. In 2020, the Guyana government is considering introducing a new national ID card for use in all public services. Guyana has immigrants, including 13,000 Venezuelans, and by 2020 there will be more than 35,000 people in need of humanitarian assistance. Digitalization of allocation and registration procedures for new immigrants at the border. |
| Rule of law                       | According to WGI, the level of "rule of law" is poor.   |
| Citizen security                  | The homicide rate is higher than the average for Caribbean countries, but has been declining since 2014. The homicide rate in 2018 was 14.2 / 100,000 (the same year, the Caribbean average was 12.1 and the world average was 5.8) (UNODC 2021).   |

Source: Survey Team

### 12.3.7 DX / Innovation

|                                 |  |                                     |
|---------------------------------|--|-------------------------------------|
| Basic indicators and statistics | E-Government Ranking 1): 129th   | Radar chart of e-government ranking |
|                                 | Mobile connection index 2): 54.0   |                                     |
|                                 | Network Infrastructure Index: 42.5   |                                     |
|                                 | Internet user rate 37.3  |                                     |
|                                 | Mobile connection rate 83.6  |                                     |
|                                 | Fixed broadband rate 8.4   |                                     |
|                                 | Rate of increase in the number of Internet users 0.5 (2021/2020)   |                                     |
| Communication network           | Guyana Telecommunication Corporation (GTO), a state-owned company that provided telecommunications services, owned an 80% stake in 1990 under an agreement with the government of Atlantic Tele-Network (ATN), a US company <sup>3</sup> ). However, Guyana Telephone and Telegraph (GTT) has dominated the fixed-line service market for about 30 years. In the mobile market, it competes with Digicel, which has been in the market since 2004, but the Telecommunications Act of 2016 was passed <sup>4</sup> ), and the market was completely liberalized in October 2020 <sup>5</sup> ). |                                     |



Fixed broadband services have improved, especially since the SG-SCS submarine cable opened in mid-20106), but are still relatively slow and expensive7), with 8.4% broadband subscribers (2017). And still below the Latin American and Caribbean average of 12.1% (2017) 8). The submarine cable 9) proposed by Digicel provides a second link to the region's international cable infrastructure and is expected to significantly reduce service prices. In the mobile sector, both GTT and Digicel operate GSM / GPRS networks, but GTT launched commercial 4G LTE services in some regions in 2017 for customers with compatible mobile phones. Offers a free upgrade to 4G 10).

#### National Strategy for Digital Transformation

The Green State Development Strategy11) consists of eight goals set in line with the United Nations Sustainable Development Goals (SDGs) and is a long-term strategy up to 2040. It includes a comprehensive development policy with public investment over the next 20 years, not only to promote sustainable economic growth through low carbon development and climate resilience, but also to unite society in accordance with the green economy. It aims to strengthen, improve governance and build a strict management system for natural resources.

The Digital Governance Roadmap12) incorporates steps to assess Gaiana's current e-government ecosystem and close the gap with the integrated e-government conceptual model while achieving goals. It is considered from a comprehensive perspective for building strategic components that are indispensable to the digital society, such as secure data exchange as an e-government system, electronic identification system for citizens and companies, and population management, and digital governance. There are also organizational, financial and legal frameworks for, and specific sectoral proposals (e-school, e-polis, e-health, e-cabinet, national geoportal establishment, etc.). ..

#### Characteristic efforts

The government's plan13) to build a domestic network connecting remote and inland government agencies was changed and suspended by a newly elected government in 2015, but in 2019, e-government and e-government The budget for building an ICT hub with remote areas that promotes the use of ICT in medical and distance education services and impacts many communities has been allocated and resumed in 202014).

To date, the Ministry of Public Telecommunications has established 241 ICT hubs throughout Guyana, each with a learning-based program that supports the school's curriculum.

In 2015, ExxonMobil discovered one of the largest oil and gas reserves in the Western Hemisphere of the Suriname Basin off the coast of Guyana, and oil production began in late 2019. The National Institute of Standards and Standards (GNBS) of Guyana has implemented Prov IT electronic software to monitor ExxonMobil's mining and production operations in real time15). Fiber optic cables that will allow Guyana to monitor Exxon's business abroad will be laid by the third quarter of 2021 15).

#### source

75. E-Gov-Index: a composite indicator that consists of three indexes (Online Service Index, Telecommunication Infrastructure Index and Human Capital Index), which are equally weighted. It ranges from 0 to 1, with 1 being the most developed.
76. Mobile Connectivity Index: an input index developed by GSMA to measure the performance against the four key enablers of mobile internet adoption – infrastructure, affordability, consumer readiness and content. (<https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2016/06/Mobile-Connectivity-Launch-Report.pdf>)
77. <https://www.gtt.co.gy/why-gtt/about-us>
78. Telecommunications Act No. 18 of 2016 [https://telecoms.gov.gy/images/acts/Telecommunications\\_Act\\_No\\_18\\_of\\_2016.pdf](https://telecoms.gov.gy/images/acts/Telecommunications_Act_No_18_of_2016.pdf)
79. Guyana --Information and Communications Technology (ICT) Sector <https://www.trade.gov/country-commercial-guides/guyana-information-and-communications-technology-ict-sector>
80. Suriname-Guyana Submarine Cable System (SG-SCS) <https://www.submarinecablemap.com/submarine-cable/suriname-guyana-submarine-cable-system-sg-scs>
81. SNAPSHOT: 2019 UPDATE ON THE AFFORDABILITY OF INTERNET SERVICE IN THE CARIBBEAN <https://www.ict-pulse.com/2019/06/snapshot-2019-update-affordability-internet-service-caribbean/>
82. Fixed broadband subscriptions (per 100 people) --Latin America & Caribbean, Guyana <https://data.worldbank.org/indicator/IT.NET.BBND.P2?locations=ZJ-GY>
83. DIGICEL BUILDS DEEP BLUE ONE SUBSEA CABLE CONNECTING FRENCH GUIANA, SURINAME, GUYANA AND TRINIDAD & TOBAGO <https://www.digicelgroup.com/en/news/2020/digicel-builds-deep-blue-one-subsea-connection.html>
84. <https://www.commsupdate.com/articles/2017/03/07/gtt-launches-lte-in-essequibo/>
85. Green State Development Strategy: Vision 2040 of Guyana <http://observatorioplanificacion.cepal.org/sites/default/files/plan/files/GSDS2040.pdf>
19. Digital Governance Roadmap for Guyana [https://ndma.gov.gy/wp-content/uploads/2020/01/DigitalGovernanceRoadmap\\_20181025.pdf](https://ndma.gov.gy/wp-content/uploads/2020/01/DigitalGovernanceRoadmap_20181025.pdf)
86. eGovernment ICT Hubs connected to the eGovernment Network <https://ndma.gov.gy/ndma-connectivity-sites-egovernment-ict-hubs/>
87. 200 ICT hubs for hinterland, riverine communities <https://dpi.gov.gy/200-ict-hubs-for-hinterland-riverine-communities/>
88. GNBS already doing real time monitoring of oil production <https://www.kaiteurnewsonline.com/2021/09/02/gnbs-already-doing-real-time-monitoring-of-oil-production/>

## 12.3.8 Infrastructure and Energy

| Transport                         |   |
|-----------------------------------|---|
| Overview                          | Inland transportation is mainly by car.<br>The main public transportation is buses and taxis. There are several domestic air routes.<br>There is no railroad. |
| Leadership governance             | Ministry of Public Works  |
| Major development partners        | IADB  |
| Energy and electricity            |   |
| Overview                          | Imported coal and oil will account for 92% of the electricity energy mix in 2019.   |
| Carbon neutral national plan      | Green State Development Strategy: Vision 2040<br>Goal: "Almost 100% renewable and clean energy" by 2040   |
| Leadership governance and utility | Ministry of Natural Resources   |

|                            |                              |
|----------------------------|------------------------------|
| company                    | Guyana Power and Light (GPL) |
| Major development partners | JICA / UNDP / IADB / GIZ     |

Source: JICA Study Team with reference to various websites of the government organization and international organization (WB / IEA / IRENA / US DOE).

### 12.3.9 Tourism

International tourism revenue is small for the number of international tourist arrivals

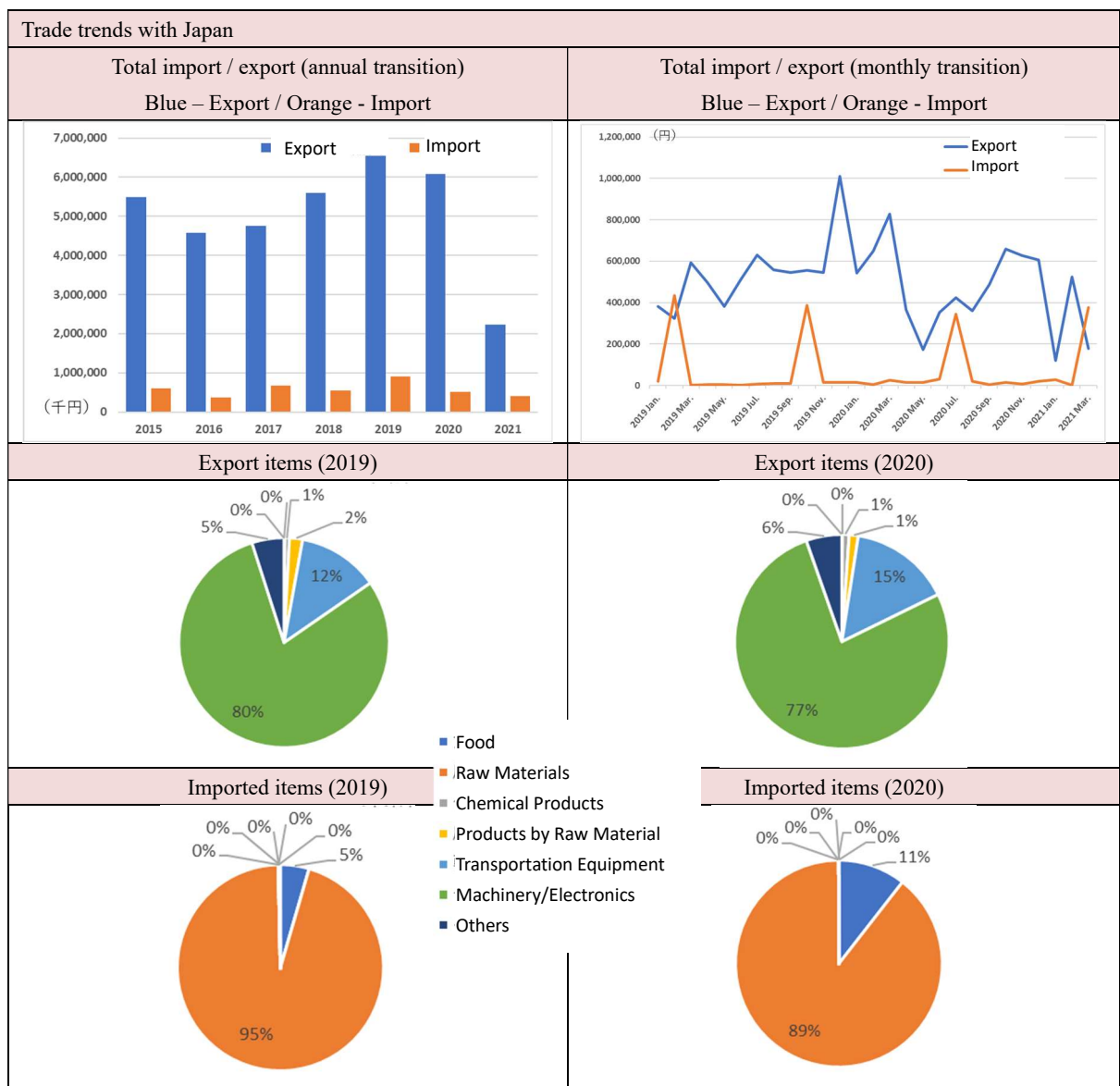
|  |  |   |
|--|--|---|
| Number of international tourist arrivals (2019)              |  | 315 thousand  |
| International Tourism Receipts (2019)                        |  | USD 27 million  |
| Tourism Competitiveness Ranking (2019)                       |  | N / A   |
| Tourism Dependency Index (2019)                              |  | 5.1 (141st out of 166 countries)  |
| Government of Japan policy                                   | Number of JICA projects in the last 10 years   | none  |
|  | References to the Country Assistance Policy  | none  |
|  | Interest in pilot projects   | N / A   |
| Tourism industry vulnerability                               | Contribution of Travel & Tourism to GDP (2019)   | 4.4% (22nd out of 23 countries)   |
|  | Contribution of Travel & Tourism to employment (2019)  | 4.7% (22nd out of 23 countries)   |
|  | Ratio of international spending (2019)   | 20% (22nd out of 23 countries)  |
|  | Top 3 countries of origin of visitors (2019)   | USA (31.50%)<br>Cuba (23.42%)<br>Haiti (7.69%)  |
| Importance of tourism  | Ratio of the budget amount of tourism-related ministries to the national budget amount (2019)            | 0.9% (9th out of 16 countries)<br>National budget: GYD 300,719,011<br>Budget of tourism-related ministries: GYD 2,657,661   |
|  | Whether or not it is mentioned as a priority sector in the National Economic and Social Development Plan | Yes<br>Plan name: Green State Development Strategy: Vision 2040<br>Reference example: 2. C3.1 Travel and Tourism (p. 161) as one of the Support Economic Resilience |
|  | Existence of effective national tourism policies / strategies / plans                                    | Yes (Living Guyana Tourism Strategic Action Plan 2018-2025. Draft)  |
| Impact of COVID-19   | Changes in the contribution of Travel & Tourism to GDP (2019 → 2020)                                     | -44.6% (23rd out of 23 countries)   |
|  | Changes in the contribution of Travel & Tourism to employment (2019 → 2020)                              | -18.4% (21st out of 23 countries)   |
| Number of government support measures for the tourism sector |  | N / A   |

Source: Survey Team

### 12.3.10 Public-private partnership

|  | item   | Contents    |
|--|--|-------------|
| No. of JICA Public-Private Partnership Projects (After 2012)                 | Cooperation preparatory survey (overseas investment and financing) (former PPP infrastructure project)           | 0 cases     |
|  | Overseas investment and loan   | 0 cases     |
|  | SME Partnership Promotion Survey (support for Small-sized Enterprise)  | 0 cases     |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for small- and medium- sized enterprise) | 0 cases     |
|  | SDGs Business Verification Survey with Private Sector (support for small- and medium- sized enterprise)          | 0 cases     |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for large enterprise)                    | 0 cases     |
|  | SDGs Business Verification Survey with Private Sector (support for large enterprise)                             | 0 cases     |
| Total number of Japanese private companies entering the market (2019 survey) | Total number of business locations   | 0 companies |
|  | Overseas branches of Japanese companies,   | 0 companies |
|  | Local corporations wholly owned by Japanese companies and their branches   | 0 companies |
|  | Branch offices wholly owned by Japanese companies and their branches   | 0 companies |
|  | joint ventures (local corporations in which Japanese companies have a direct or indirect stake of 10% or more)   | 0 companies |

|  |  |             |
|--|--|-------------|
|  | joint ventures (Branch offices in which Japanese companies have a direct or indirect stake of 10% or more)     | 0 companies |
|  | companies established overseas by Japanese nationals (in which Japanese nationals have a stake of 10% or more) | 0 companies |
|  | Unknown classification   | 0 companies |
| Number of Japanese residents (2020 survey) | Total  | 6 people    |
|  | Long-term residents  | 1 person    |
|  | Permanent resident   | 5 people    |
| Business Environment                       | Doing Business 2020 Rank   | 134th place |
| PPP Project                                | Existence of PPP law scheme  | △           |
|  | PPP project with Japanese companies  | 0 cases     |



Gathering information about the PPP system

| Nº  | Task Item   | Inquiries/comments/status<br>Title of submitted file  | Source/URL  |
|-----|---|---|---|
| 1   | <b>PRIORITY 4_PPP Sector</b>  |   |   |
| 1.1 | PPP Projects in selective countries<br>PPP rules and regulations in Central America and Caribbean Countries |   | All below can be useful   |
| A   | PPP laws and Regulations<br>if there is any, when, and how  | There are mentions of the PPP Policy Framework around april 2018. But can't access the PPP Policy Framework file, neither in the Parliament website or in the MEF website | -<br><a href="https://www.kaieteurnewsonline.com/2018/06/08/public-private-partnership-policy-to-ensure-value-for-money-in-public-sector-projects-jordan/">https://www.kaieteurnewsonline.com/2018/06/08/public-private-partnership-policy-to-ensure-value-for-money-in-public-sector-projects-jordan/</a><br>- <a href="https://parliament.gov.gy//documents/documents-laid/">https://parliament.gov.gy//documents/documents-laid/</a> (can't access the PPP Policy Framework)   |
| B   | PPP Unit Organization<br>if there is any, how structured  | GO-Invest (Guyana Office for Investment) serve as a primary contact for investors and liaising with government  | - <a href="https://psc.org.gy/">https://psc.org.gy/</a> (Private Sector Commission of Guyana)   |
| C   | PPP sectors<br>in what sectors are the PPPs allowed   | Any sector is available   |   |
| D   | Proposal Types (Solicited or Unsolicited)<br>unsolicited  | Both are available (in the links are some examples. Example: 8in-x-3col-GMC-EOI.pdf)  | - <a href="https://dpi.gov.gy/gnsc-urged-to-consider-public-private-partnerships/(unsolicited)">https://dpi.gov.gy/gnsc-urged-to-consider-public-private-partnerships/(unsolicited)</a><br>- <a href="https://dpi.gov.gy/gmc-eoi-public-private-partnership/(Solicited)">https://dpi.gov.gy/gmc-eoi-public-private-partnership/(Solicited)</a>  |
| E   | PPP Forms<br>BOT,BTO,DB,,,what form are allowed   | The PPP forms with data available:<br>- MC<br>- C<br>See file "210520_PPP Database" sheet "Resume PPP"  | <a href="https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true">https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true</a> |
| F   | PPP types<br>Availability payment, service purchase   | There is no public information on the subject.  |   |
| G   | PPP Project Trends<br>how much PPP projects in the last 10 years  | No information found  | <a href="https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CU&amp;header=true">https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CU&amp;header=true</a>   |
| H   | Participation of Japanese firms in PPP Projects<br>if any (check news source)                               | No information found  |   |
| I   | Any notable points for each country<br>if any   | Information   | <a href="http://pppstandards.org/guyana/">http://pppstandards.org/guyana/</a>   |

Source: Survey Team

## 13. Haiti

### 13.1 Country overview (basic information)

#### 13.1.1 Basic information

The Republic of Haiti (French: République d'Haïti), commonly known as Haiti, is a republican territory of the western part of Hispaniola in the Greater Antilles, which is part of the West Indies of Central America. It borders the Republic of Dominica to the east, with Cuba to the northwest across the Windward Passage in the Caribbean and Jamaica to the west across the Jamaican Strait. The capital is Port-au-Prince. It covers an area of 27,750 square kilometers and has a population of 11.26 million (as of 2019, World Bank data). Independence in 1804 was the first in Latin America, the second in the Americas, and the world's first black republic. However, political turmoil and the poorest economic conditions in the United States have continued since independence, and the massive disasters that have occurred since the 2000s and the delays in their recovery have spurred the turmoil. Diplomacy emphasizes relations with the United States and France, which are historically closely related, as well as Canada, but restored diplomatic relations with Cuba in 1996 (they were in conflict with the United States and pro-American countries during the Cuban Revolution). .. Haiti has approved the Republic of China (Taiwan). As a country in the Caribbean world and Latin America, it participates in the Caribbean Community (CARICOM) and the Latin American and Caribbean Community (CELAC). It has been hit hard by political instability and disasters, and is supported by the United Nations and the Organization of American States (OAS). Diplomatic relations with Japan resumed in 1956 after the Pacific War. The Embassy of Japan in Haiti is scheduled to open on January 1, 2020, after being concurrently controlled by the Embassy of Japan in Dominican Republic.

#### 13.1.2 General circumstances

|             |  |                 |   |
|-------------|--|-----------------|---|
| 1 area      | 27,750 square kilometers (about 1/3 of the area of Hokkaido) | 2 Population    | Approximately 11.26 million people (2019 World Bank)    |
| 3 Capital   | Port-au-Prince   | 4 ethnic groups | African descent (95%), others (5%)                      |
| 5 languages | French, Haitian Creole (both official languages)             | 6 religion      | Christianity (Catholic, Protestant, etc.), Voodoo, etc. |

Source: Ministry of Foreign Affairs HP Haiti Basic Data

#### 13.1.3 Economic overview

|                          |  |                              |   |
|--------------------------|--|------------------------------|---|
| 1 Major industry         | Agriculture, forestry and fisheries, construction / public works, light industry, transportation / communications, and other service industries (2017 Haiti Statistics and Information Research Institute (IHSI))  | 2 GNI<br>3 GNI / person      | US \$ 8,911 million (World Bank 2019)<br>US \$ 3,040 (2019) |
| 4 Economic growth rate   | -0.9% (2019 World Bank)  | 5 Unemployment rate          | unknown   |
| 6 Price increase rate    | 9.1% (2017 estimate), 5.9% (2018 estimate), 5.0% (2019 estimate) (IMF)   |                              |   |
| 7 Total trade amount     | Exports: US \$ 1.078 billion (goods only) (2018 WTO)<br>Imports: US \$ 4,822 million (goods only) (2018 WTO)   |                              |   |
| 8 Major trade items      | Export: Clothing, processed goods, cacao, mango, coffee<br>Import: Food, processed goods, machinery / transportation equipment, fuel, mineral raw materials  |                              |   |
| 9 Major trading partners | Export: unknown<br>Import: Unknown   |                              |   |
| 10 currencies            | Guldo  | 11 Foreign currency reserves | na  |
| 12 National budget       | na   | 13 External debt balance     | na  |
| 14 Economic overview     | (1) Until the 1970s, the Haiti economy was a fragile industrial structure dependent on agriculture. Although the light industry has partially developed since the 1980s, economic instability in the country and economic sanctions by the international community triggered by the military coup d'etat in 1991 hindered economic development, and in 1994, the national economy became the capital. The population |                              |   |

|  |   |
|--|---|
|  | <p>was concentrated in Japan, the unemployed were flooded, and they were in distress. Assistance from the international community was resumed with the restoration of democracy, but the economic and social situation in Haiti has continued to be severe due to political instability in Haiti and the occurrence of natural disasters.</p> <p>(2) In September 2008, a hurricane that passed continuously near the country caused about 800,000 victims, including about 800 dead, and suffered a loss equivalent to about 15% of the country's GDP.</p> <p>(3) In January 2010, a large-scale earthquake struck near the capital, where people live in non-seismic concrete houses, and about 3.7 million people were affected, including about 310,000 dead (announced by the Haiti government). ), And suffered a loss of about 7.8 billion dollars, which is about 120% of the country's GDP.</p> <p>(4) In October 2016, Hurricane Matthew struck the Haiti economy and suffered a loss of about \$ 2 billion, or about one-fifth of GDP. The agricultural sector suffered \$ 580 million worth of damage, and 90% of the country's crops were damaged.</p> <p>(5) Although the Haiti economy has potential for growth, it is hampered by factors such as disasters, political instability, excessive reliance on development assistance, and a fragile industrial structure.</p> |
|--|---|

Source: Ministry of Foreign Affairs HP Haiti Basic Data

### 13.1.4 Country-specific development cooperation policy

#### (1) Government of Japan Development Cooperation Policy by Country

**Table 13-1 Overview of Japan's ODA to Haiti**

|  |  |
|--|--|
| <b>1. 1. Overview</b>  |  |
| <p>Japan's economic cooperation with Haiti began in 1979 and has been stagnant due to political instability for many years. Has signed a technical cooperation agreement and started accepting trainees to Japan. After the Haiti earthquake in January 2010, Japan dispatched the Japan Disaster Relief Team and the Self-Defense Forces facility unit. In addition, by December 2016, it had provided a total of more than \$ 260 million, exceeding the total of about \$ 100 million announced at the Haiti Supporters' Meeting in March 2010.</p>   |  |
| <b>2. 2. Aim of development cooperation</b>  |  |
| <p>Haiti is the poorest country in the Western Hemisphere, and its people have long suffered from poverty. The magnitude 7.0 earthquake in January 2010 killed more than 310,000 people and caused enormous damage. After that, although efforts for reconstruction were underway, Hurricane Matthew, which passed through the country in October 2016, caused great damage again. Reconstruction has been delayed significantly due to the effects of the cholera epidemic and the delay in the inauguration of the government due to the presidential election, and the country, whose social infrastructure has been vulnerable even before the earthquake, has many development issues such as lack of basic social services. For Haiti, where establishing basic social services from the perspective of "human security" is a major issue, it is of great significance to provide support that makes use of the experience and knowledge of a disaster-stricken country.</p>   |  |
| <b>3. 3. Basic policy</b>  |  |
| <p>In order to shift from the stage of development cooperation centered on humanitarian assistance to the stage of economic development and to support Haiti's efforts to enter emerging countries, we aim to build a strong social foundation that is a prerequisite for development, and the basic society in Haiti. We will provide support centered on the establishment of services.</p>  |  |
| <b>4. Priority areas</b>   |  |
| <p>(1) Improvement of health and hygiene environment: Aim to improve health services through health and medical infrastructure development, human resource development, and improvement of medical institution management capacity. In addition, for effective countermeasures against infectious diseases such as cholera, we will work on providing safe water, enlightenment activities to improve the sanitary environment, and infrastructure development.</p> <p>(2) Education promotion: We will provide support for infrastructure development and human resource development of teachers with the development of basic education and various economic and social activities in mind.</p> <p>(3) Promotion of agriculture and strengthening of food security: While agriculture is an important sector in Haiti, the food and agriculture sector is from the perspective of food security and economic stability, given that the food self-sufficiency rate remains at around 45%. To support.</p> <p>(4) Strengthening the economic base through disaster prevention and environmental conservation: Since repeated natural disasters are one of the obstacles to the country's economic development, the "Sendai Framework for Disaster Risk Reduction" was adopted while paying attention to domestic environmental conservation. We will support efforts to improve resilience to natural disasters in accordance with this.</p> |  |

Source: Ministry of Foreign Affairs HP Haiti Country Data Collection 2017

**Table 13-2 National Development Cooperation Policy for Haiti (September 2017)**

|   |  |
|---|--|
| <b>3. 3. Priority field (medium goal)</b>         |  |
| (1) Improvement of health and hygiene environment | We aim to improve health services through the development of health care infrastructure, human resource development, and improvement of the operating capacity of medical institutions. In the field of health care, we will work on providing safe water, enlightenment activities to improve the sanitary environment, and infrastructure development. |

|  |  |
|--|--|
| (2) Education promotion  | As the basis of economic and social development, we will provide support for infrastructure development and human resource development of teachers, with the development of basic education and various economic and social activities in mind.  |
| (3) Promotion of agriculture and strengthening of food security                              | Agriculture is an important sector in which more than 50% of the total working population of Haiti is engaged, while the food self-sufficiency rate remains at around 45% due to the effects of production and distribution systems and natural disasters, and it is strongly dependent on imported agricultural products, and food security. From the perspective of security and financial stability, it is necessary to provide support in the food and agriculture fields. |
| (4) Strengthening the economic base through disaster prevention and environmental protection | Repeated natural disasters such as major earthquakes and hurricanes are one of the obstacles to the country's economic development, and we will support efforts to improve resilience to natural disasters in accordance with the "Sendai Framework for Disaster Risk Reduction".  |

Source: Survey Team

## (2) Survey on COVID-19 by development partners

We extracted sector names and specific quantitative figures that have a large impact on the country-specific analysis described in various reports of development partners. Reports from the World Bank, OECD, BCIE, SICA, and the Ministry of Economy, Trade and Industry of Japan suggest the importance of introducing digitalization and innovation (Fintech, Aggrotech, Autotech, etc.), and incorporate the survey results of these development partners. I arranged it accordingly.

World Bank: "Growth and Revitalization" 2021 Semi-Annual Economic Report (March 2021)

- ✓ OECD: COVID-19 in LAC, Regional socio-economic implications and policy priorities (December 2020)
- ✓ BCIE: Impacto Económico del COVID-19 (April 2020)
- ✓ SICA: Estimación del Impacto Económico del COVID-19 en Centroamérica y República Dominicana (April 2020)
- ✓ Ministry of Economy, Trade and Industry of Japan: "Economic and Industrial Policy Based on the Impact of the New Corona Virus" (June 2020), Accelerating Digitization and Onlineization, Gig Economy, Innovation in the Transition to a New Everyday Life 1) Medical care / health, 2) Digital: Infrastructure development premised on the arrival of a digital society, 3) Green: Response to climate change problems, Energy security, 4) Emphasizes resilience.

### 13.1.5 Policies for COVID-19 measures taken by governments of each country

Various policies for COVID-19 taken by the government are described on the ECLAC homepage "COVID-19 Observatory" by country, time series, and field, and can be analyzed.

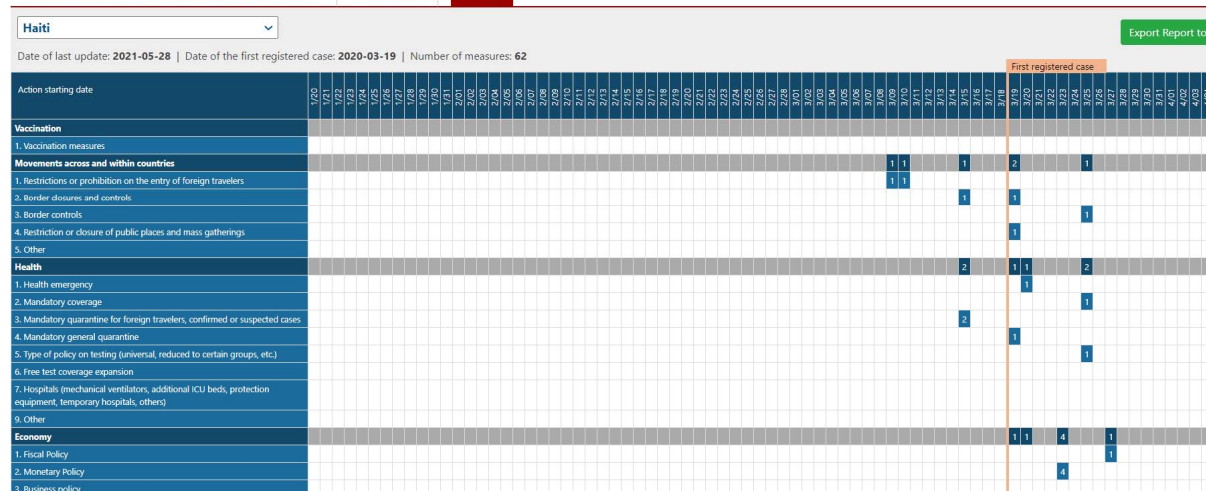




Follow-up of the evolution of COVID-19 Measures

Measures details

Timeline



Source: <https://cepalstat-prod.cepal.org/forms/covid-countrysheet/index.html?table=2&country=HTI>

In this survey, the 34 policies implemented in Haiti posted on this website were classified by sector as much as possible.

**1) Infection spread and alleviation of aggravation and death**

No material was available.

**2) Support for affected industries and people**

**Table 13-3 Support for Affected Industries and People (Haiti)**

| Various government policies (COVID-19 Observatory for LAC) |    |  |  |
|--|----|--|--|
| Socioeconomic policy                                       | 18 |  |  |
| Health care & nutrition                                    | 8  |  |  |
| Education  | 1  |  |  |
| Agriculture & rural development                            | 1  |  |  |
| Private sector   | 2  |  |  |
| Environment & disaster prevention                          | 0  |  |  |
| Governance and social security                             | 1  |  |  |
| DX and innovation  | 1  |  |  |
| Infrastructure & energy                                    | 0  |  |  |
| Tourism  | 0  |  |  |
| PPP  | 0  |  |  |
| Others (b)   | 2  |  |  |
| total  | 34 |  |  |

Source: Survey Team

**3) Arrangement of various policies for COVID-19 taken by the government**

COVID-19 Observatory for Latin America and Caribbean (ECLAC) organized by governments

**Table 13-4 Government-directed COVID-19 Policy Categories (Haiti)**

**Follow-up of the evolution of COVID-19 Measures**

| <b>Vaccination</b>  | <b>Economy</b>   | <b>Social protection</b>  |
|---|--|---|
| 1. Vaccination measures   | 1. Fiscal Policy   | 1. Cash transfers (new transfers, increase in existing transfers, expansion of cash transfers to new recipients, early disbursement of transfers) |
| <b>Movements across and within countries</b>  | 2. Monetary Policy   | 2. Food transfers / In-kind transfers   |
| 1. Restrictions or prohibition on the entry of foreign travelers  | 3. Business policy   | 3. Guarantee of basic services  |
| 2. Border closures and controls   | 4. Restriction of economic activity (including shops and shopping centers)                             | <b>Education / schools</b>  |
| 3. Border controls  | 5. Price and quantity controls   | 1. Suspension of classes  |
| 4. Restriction or closure of public places and mass gatherings  | 6. Economic Stimulus (includes aggregate value of fiscal measures and separately of credit guarantees) | 2. Provision of tools for distance learning (online platforms, TV, radio, distance-learning materials)  |
| 5. Other  | 7. Regulation of the personal hygiene and cleaning products market                                     | 3. Maintenance of school feeding programme (indicating under which modalities)  |
| <b>Health</b>   | 8. Debt relief and suspension of credit payments (individuals, microentrepreneurs)                     | <b>Gender</b>   |
| 1. Health emergency   | 9. Other   | 1. Gender-based violence against women  |
| 2. Mandatory coverage   | <b>Labor</b>   | 2. Care economy   |
| 3. Mandatory quarantine for foreign travelers, confirmed or suspected cases                                   | 1. Labor Protection  | 3. Employment and income generation   |
| 4. Mandatory general quarantine   | 2. Elective work leave   | 4. Benefits, transfers and other social protection measures   |
| 5. Type of policy on testing (universal, reduced to certain groups, etc.)                                     | 3. Reduction of working hours  | 5. Women's participation in the digital era   |
| 6. Free test coverage expansion   | 4. Prohibition of dismissal from work  | 6. Other  |
| 7. Hospitals (mechanical ventilators, additional ICU beds, protection equipment, temporary hospitals, others) | 5. Other   |   |

Source: Survey Team

## 13.2 Macroeconomic analysis and selection of priority countries

### 13.2.1 Macroeconomic analysis

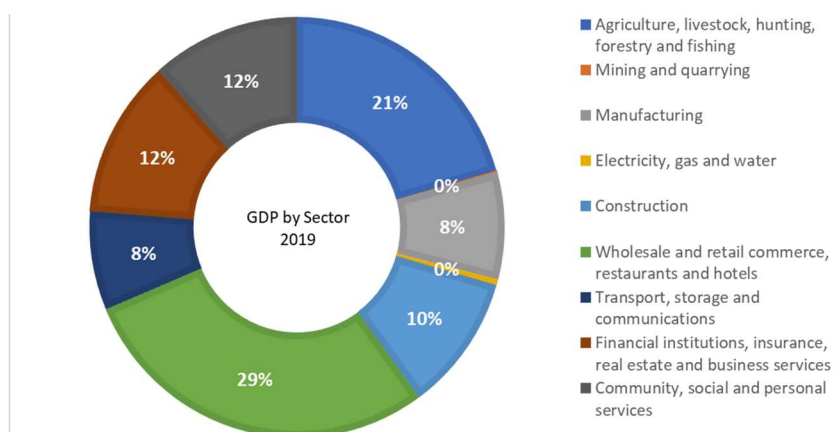
#### (1) Industrial composition

**Table 13-5 Industrial Composition (Haiti)**

Table: Gross domestic product, by sector (En millones de gourdes a precios constantes de 1986-1987)

|  | 2011   | 2012   | 2013   | 2014   | 2015   | 2016   | 2017   | 2018   | 2019a/ | 2020 b/ |
|--|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------|
| Agriculture, livestock, hunting, forestry and fishing                | 3,262  | 3,220  | 3,360  | 3,311  | 3,131  | 3,227  | 3,254  | 3,287  | ...    |         |
| Mining and quarrying   | 20     | 17     | 18     | 19     | 20     | 20     | 21     | 21     | ...    |         |
| Manufacturing  | 1,074  | 1,150  | 1,174  | 1,206  | 1,261  | 1,280  | 1,293  | 1,308  | ...    |         |
| Electricity, gas and water   | 91     | 69     | 69     | 70     | 70     | 72     | 73     | 73     | ...    |         |
| Construction   | 1,275  | 1,345  | 1,470  | 1,586  | 1,622  | 1,625  | 1,639  | 1,674  | ...    |         |
| Wholesale and retail commerce, restaurants and hotels                | 3,765  | 3,954  | 4,147  | 4,323  | 4,441  | 4,474  | 4,524  | 4,564  | ...    |         |
| Transport, storage and communications                                | 1,092  | 1,078  | 1,117  | 1,158  | 1,189  | 1,194  | 1,206  | 1,218  | ...    |         |
| Financial institutions, insurance, real estate and business services | 1,577  | 1,638  | 1,692  | 1,779  | 1,817  | 1,865  | 1,894  | 1,939  | ...    |         |
| Community, social and personal services                              | 1,584  | 1,629  | 1,671  | 1,705  | 1,761  | 1,788  | 1,803  | 1,842  | ...    |         |
| Total  | 13,740 | 14,100 | 14,718 | 15,157 | 15,312 | 15,545 | 15,707 | 15,926 | 0      | 0       |

Source: ECLAC



Source: Survey Team

## (2) Trends in major economic indicators

**Table 13-6 Trends in Major Economic Indicator (Haiti)**

Table 1 HAITI: MAIN ECONOMIC INDICATORS (Annual growth rates)

|  | 2011     | 2012     | 2013     | 2014     | 2015     | 2016     | 2017     | 2018     | 2019a/   | 2020 b/  |
|--|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|
| Gross domestic product (Annual growth rates c/)                                      | 5.5      | 2.9      | 4.2      | 2.8      | 1.2      | 1.5      | 1.2      | 1.5      | -1.7     | -3.0     |
| Per capita gross domestic product (Annual growth rates c/)                           | 3.9      | 1.4      | 2.7      | 1.4      | -0.2     | 0.1      | -0.1     | 0.2      | -2.9     | -4.7     |
| Gross domestic product, by sector (Annual growth rates c/)                           |          |          |          |          |          |          |          |          |          |          |
| Agriculture, livestock, hunting, forestry and fishing                                | 1.0      | 1.0      | 1.0      | 1.0      | 0.9      | 1.0      | 1.0      | 1.0      | ...      | ...      |
| Mining and quarrying   | 1.2      | 0.9      | 1.1      | 1.1      | 1.1      | 1.0      | 1.1      | 1.0      | ...      | ...      |
| Manufacturing  | 1.2      | 1.1      | 1.0      | 1.0      | 1.0      | 1.0      | 1.0      | 1.0      | ...      | ...      |
| Electricity, gas and water   | 1.3      | 0.8      | 1.0      | 1.0      | 1.0      | 1.0      | 1.0      | 1.0      | ...      | ...      |
| Construction   | 1.1      | 1.1      | 1.1      | 1.1      | 1.0      | 1.0      | 1.0      | 1.0      | ...      | ...      |
| Wholesale and retail commerce, restaurants and hotels                                | 1.0      | 1.1      | 1.0      | 1.0      | 1.0      | 1.0      | 1.0      | 1.0      | ...      | ...      |
| Transport, storage and communications  | 1.1      | 1.0      | 1.0      | 1.0      | 1.0      | 1.0      | 1.0      | 1.0      | ...      | ...      |
| Financial institutions, insurance, real estate and business services                 | 1.0      | 1.0      | 1.0      | 1.1      | 1.0      | 1.0      | 1.0      | 1.0      | ...      | ...      |
| Community, social and personal services  | 1.0      | 1.0      | 1.0      | 1.0      | 1.0      | 1.0      | 1.0      | 1.0      | ...      | ...      |
| Balance of Payments (Millions of dollars)  |          |          |          |          |          |          |          |          |          |          |
| Current account balance  | -326.4   | -449.3   | -560.9   | -749.5   | -265.7   | -71.2    | -83.9    | -372.8   | -122.9   | 781.0    |
| Goods balance  | -2,545.9 | -2,304.7 | -2,425.7 | -2,705.2 | -2,425.4 | -2,175.9 | -2,626.3 | -3,405.8 | -2,996.5 | -1,969.6 |
| Exports, f.o.b.  | 768.1    | 774.6    | 914.9    | 960.9    | 1,024.0  | 1,007.5  | 991.4    | 1,078.5  | 1,201.1  | 631.2    |
| Imports, f.o.b.  | 3,314.0  | 3,079.3  | 3,340.6  | 3,666.2  | 3,449.4  | 3,183.3  | 3,617.7  | 4,484.3  | 4,197.5  | 2,600.8  |
| Services trade balance   | -575.4   | -567.0   | -450.0   | -384.8   | -318.1   | -407.7   | -399.0   | -486.1   | -618.1   |          |
| Income balance   | 37.8     | 54.5     | 31.6     | 49.1     | 40.6     | 47.9     | 58.5     | 50.3     | 49.7     |          |
| Net current transfers  | 2,757.1  | 2,367.9  | 2,283.3  | 2,291.4  | 2,437.2  | 2,464.4  | 2,882.8  | 3,468.9  | 3,442.0  |          |
| Capital and financial balance (Millions of dollars)                                  |          |          |          |          |          |          |          |          |          |          |
| Net foreign direct investment d/   | 119.0    | 156.0    | 161.9    | 99.0     | 105.7    | 104.9    | 374.9    | 105.0    | 75.0     |          |
| Other capital movements d/   | 393.5    | 547.3    | 408.6    | 170.1    | -63.4    | 47.7     | -262.5   | 216.5    | -142.3   |          |
| Foreign remittance from abroad for 2019 and 2020                                     | 573.5    | 788.4    | 624.8    | 325.2    | 165.0    | 261.2    | 348.8    | 456.1    | 63.6     |          |
| Microfinance dispatched and the sectors that received microfinance for 2019 and 2020 |          |          |          |          |          |          |          |          |          |          |

Source: Economic Survey of Latin America and the Caribbean 2020: Main conditioning factors of fiscal and monetary policies in the post-COVID-19 era

### 13.2.2 Impact analysis and identification of key sectors

#### (1) Impact assessment results for each sector by AHP analytic hierarchy process based on economic indicators

**Table 13-7 Results of Sector Impact Analysis by COVID-19 (Haiti)**

| ECLAC category   | Changes around COVID-19 | Trends before COVID-19 | Total GDP ratio of the sector | comprehensive evaluation |   |
|--|-------------------------|------------------------|-------------------------------|--------------------------|---|
| Importance (weight)  | 0.4590                  | 0.0660                 | 0.0750                        |                          |   |
| Agriculture, livestock, hunting, forestry and fishing                | 7                       | 9                      | 8                             | 0.108                    | 2 |
| Mining and quarrying   |                         | 9                      | 1                             | 0.009                    | 9 |
| Manufacturing  | 7                       | 9                      | 3                             | 0.099                    | 5 |
| Electricity, gas and water   |                         | 9                      | 2                             | 0.011                    | 8 |
| Construction   | 7                       | 9                      | 5                             | 0.103                    | 3 |
| Wholesale and retail commerce, restaurants and hotels                | 9                       | 9                      | 9                             | 0.134                    | 1 |
| Transport, storage and communications                                | 7                       | 9                      | 4                             | 0.101                    | 4 |
| Financial institutions, insurance, real estate and business services |                         | 9                      | 6                             | 0.017                    | 7 |
| Community, social and personal services                              |                         | 9                      | 7                             | 0.019                    | 6 |

Source: Survey Team

#### 1) Amendment of ECLAC sector classification to this sector classification and selection of priority sectors

In line with the method described in the main volume, the Sector Classification is divided into the Vertical Sector and the Cross-Cutting Sector, the ECLAC classification sector is allocated to the Vertical Sector Classification, and the evaluation of various policies related to COVID-19 taken by the

government along with the results of the partner survey and the indicators of the national development cooperation policy, the ranking of priority sectors are calculated using the four indicators, which are described in the table below.

**Table 13-8 Ranking of Priority Sectors (Haiti)**

|                                   | Economic Indicator Analysis | Government Policy on COVID-19 | Survey on COVID-19 by Development Partners | Country Development Cooperation Policy | Base Case |   | Priority |
|-----------------------------------|-----------------------------|-------------------------------|--|--|-----------|---|----------|
| Importance (weight)               | 0.6000                      | 0.2000                        | 0.1000                                     | 0.1000                                 |           |   |          |
| Social and Economic Policy        | 0.0000                      | 0.1059                        | 0.0000                                     | 0.0000                                 | 0.1059    |   | ○        |
| Health and Nutrition              | 0.0407                      | 0.0471                        | 0.0000                                     | 0.0200                                 | 0.1078    | 4 |          |
| Education                         | 0.0351                      | 0.0059                        | 0.0000                                     | 0.0200                                 | 0.0610    | 5 |          |
| Agriculture and Rural Development | 0.1054                      | 0.0059                        | 0.0167                                     | 0.0200                                 | 0.1479    | 3 | ○        |
| Manufacturing                     | 0.1301                      | 0.0118                        | 0.0167                                     | 0.0000                                 | 0.1585    | 2 | ○        |
| Environment/ Disaster Management  | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0200                                 | 0.0200    |   | ○        |
| Governance and Security           | 0.0000                      | 0.0059                        | 0.0000                                     | 0.0000                                 | 0.0059    |   | ○        |
| DX Innovation                     | 0.0000                      | 0.0059                        | 0.0500                                     | 0.0000                                 | 0.0559    |   | ○        |
| Infrastructure and Every          | 0.2298                      | 0.0000                        | 0.0167                                     | 0.0200                                 | 0.2664    | 1 | ○        |
| Tourism                           | 0.0590                      | 0.0000                        | 0.0000                                     | 0.0000                                 | 0.0590    | 6 |          |
| Public-Private Partnership        | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0000                                 | 0.0000    |   | ○        |

Source: Survey Team

## (2) Sensitivity analysis

### 1) Analysis case settings

Based on the above methodology, the following case settings were made.

**Table 13-9 Sensitivity Analysis Case-based Weighting Settings (Haiti)**

|  | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|--|-----------|------------------------|------------------------|------------------------|
| Economic indicator analysis  | 0.6       | 0.6                    | 0.5                    | 0.5                    |
| Investigation and arrangement of various policies for COVID-19 taken by the government | 0.2       | 0.1                    | 0.1                    | 0.1                    |
| Development partner survey results   | 0.1       | 0.2                    | 0.2                    | 0.3                    |
| Country-specific development cooperation policy  | 0.1       | 0.1                    | 0.2                    | 0.1                    |

Source: Survey Team

## 2) Summary of sensitivity analysis

The results of each sensitivity analysis are as summarized below. Sensitivity analysis did not show much change, which was close to the result of the base case.

**Table 13-10 Summary of Sensitivity Analysis Results (Haiti)**

|                                   | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|-----------------------------------|-----------|------------------------|------------------------|------------------------|
| Social and economic policy        |           |                        |                        |                        |
| Health care / nutrition           | 4         | 4                      | 4                      | 4                      |
| education                         | 5         | 6                      | 5                      | 5                      |
| Agriculture / rural development   | 3         | 3                      | 2                      | 3                      |
| Manufacturing industry            | 2         | 2                      | 3                      | 2                      |
| Environment / disaster prevention |           |                        |                        |                        |
| Governance and citizen security   |           |                        |                        |                        |
| DX / Innovation                   |           |                        |                        |                        |
| Infrastructure and Energy         | 1         | 1                      | 1                      | 1                      |
| sightseeing                       | 6         | 5                      | 6                      | 6                      |
| Public-private partnership        |           |                        |                        |                        |

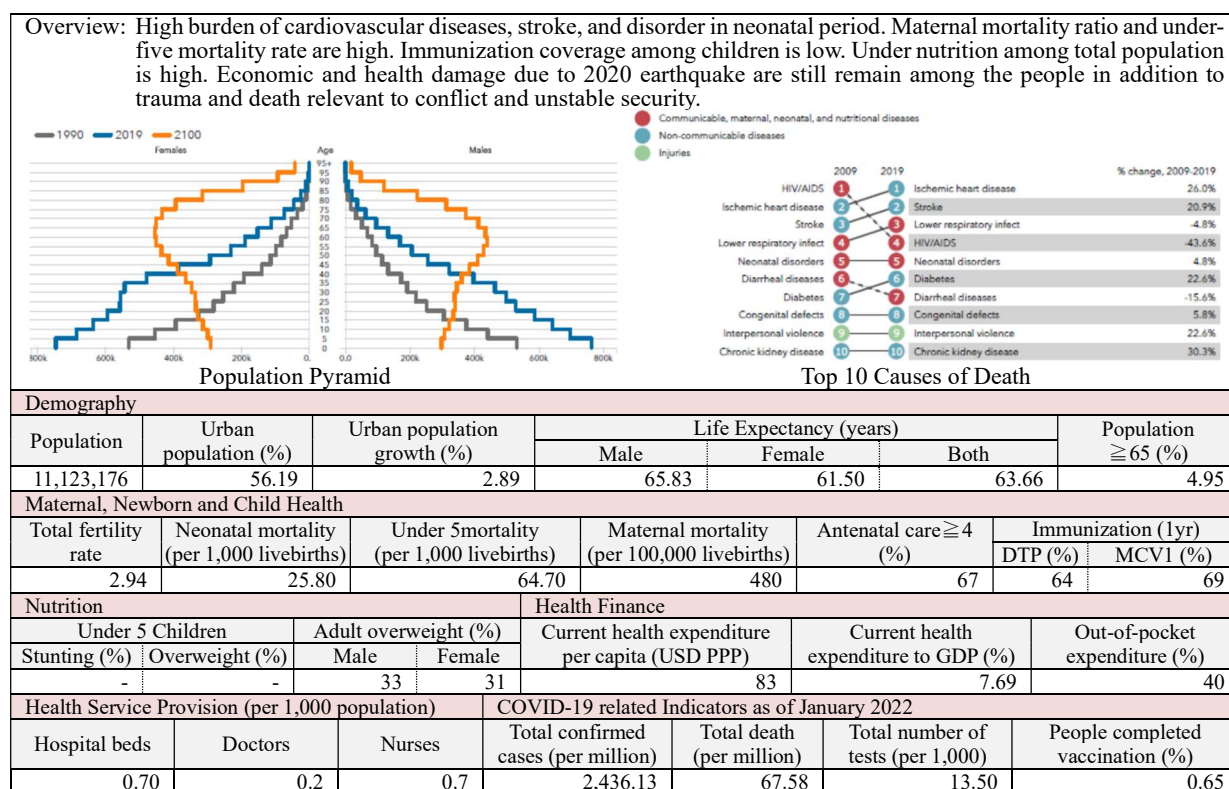
Source: Survey Team

### **(3) Selection of priority sectors by country**

From the above results, 1) social / economic policy, 2) agriculture / rural development, 3) manufacturing industry, 4) environment / disaster prevention, 5) governance / citizen security, 6) DX / innovation, 7) infrastructure / energy, 8) Public-private partnership are selected as priority sectors.

## 13.3 Country-specific information by sector

### 13.3.1 Health care / nutrition



Source: Graphs=Institute for Health Metrics and Evaluation, County Profile; Demography, Total fertility rate, Neonatal mortality, under-5 mortality, Health finance= World Development Indicators, the World Bank (Accessed on Aug 2021); Maternal mortality= UNICEF (Sep 2019); Antenatal care, Immunization, Nutrition, Health service provision,= OECD/The World Bank (2020), Health at a Glance: Latin America and the Caribbean 2020; COVID-19 related indicators= Our World in Data (Accessed on Jan 2022)

| Health                                  |  |
|---|--|
| Leadership/ Governance                  | Responsible Agency: Ministère de la Santé Publique et de la Population (MSPP)<br><a href="https://www.mspp.gouv.ht/">https://www.mspp.gouv.ht/</a><br>Centralized<br>Major Relevant Policies: Politique Nationale de Santé (PNS)   |
| Service Providing System                | More than half of health institutions are under private sector or PPP.   |
| Health Finance                          | Government finance with high dependency to external donor/ Compulsory health insurance for formal sector, but low coverage, 2%/ National health insurance scheme is under development.   |
| Human Resource for Health               | Concentrated in urban areas  |
| IT/ Digital Health                      | Electronic health records since 2005/ Electronic information system for emergency medical services since 2015<br>In 2020, telemedicine was launched in collaboration between the Haitian Society of Telemedicine and Laswenyay ( <a href="https://www.laswenyay.com/">https://www.laswenyay.com/</a> ) to provide remote counselling for rural population. |
| Drugs/ Medical Equipment                | MSPP control production, procurement, and distribution, as well as licensing to relevant agents/ companies.  |
| Priority                                | Fulfillment of basic health needs/ MNCH/ Adolescent health/ Trauma and disease control/ Nutrition/ Health promotion  |
| Communicable Disease Emergency Response | Necessary action and responses are undertaken along with IHR.<br>National influenza center: Laboratoire de Santé Publique Biologie Moléculaire, LNSP   |
| Major Development Partners              | PAHO/WHO, World Bank, IDB  |
| Nutrition                               |  |
| Institutional Arrangement               | National Food Security Commission  |
| Major Relevant Policies                 | National Food and Nutrition Security Plan (2016-2025)<br>Law on National Food and Nutrition Sovereignty and Security Policy (draft)  |
| Human Resource for Health               | Nutrition related degrees: No<br>Nutrition related subjects in pre-service education: Yes<br>Number of nutrition related professionals: 0.8 per 100,000 population   |

Source: Survey Team with reference to Institute for Health Metrics and Evaluation, County Profile, The Borgen Project, Healthcare in Haiti: 5 Things to Know, July 2020, JICA, Draft final report of data collection survey on UHC in Latin America and Caribbean Region, 2021 (closed), SUN website, WHO, Global atlas of medical devices, 2017, Haiti - Technology : Launch of a Haitian digital health and telemedicine platform (<https://www.haitilibre.com/en/news-32015-haiti-technology-launch-of-a-haitian-digital-health-and-telemedicine-platform.html>), 2020, and WHO, Nutrition Landscape Information System (NLIS)



### 13.3.2 Education

| Overview                   |   |  |            |            |               |         |               |         |                  |    |    |   |    |    |                   |    |    |   |    |    |                           |    |    |   |    |    |                           |    |    |   |    |    |
|----------------------------|---|--|------------|------------|---------------|---------|---------------|---------|------------------|----|----|---|----|----|-------------------|----|----|---|----|----|---------------------------|----|----|---|----|----|---------------------------|----|----|---|----|----|
| Number of children         | <ul style="list-style-type: none"> <li>Number of children nationwide: 4,430,814</li> <li>Number of preschool children: 613,160</li> <li>Number of children: 3,347,241 in Basic education (1st to 9th grade)</li> <li>Number of secondary education students: 410,413</li> <li>18,551 primary schools, 74,692 teachers (from preschoolers to sixth grade)</li> </ul> (8 % of schools are public primary schools and 9.5 % of lower secondary schools are public account for 9.5% of the total, and most of them are private schools) |  |            |            |               |         |               |         |                  |    |    |   |    |    |                   |    |    |   |    |    |                           |    |    |   |    |    |                           |    |    |   |    |    |
| Government authority       | Ministry of Education and Vocational Training (Ministère de l'Éducation nationale, et de la Formation Professionnelle)  |  |            |            |               |         |               |         |                  |    |    |   |    |    |                   |    |    |   |    |    |                           |    |    |   |    |    |                           |    |    |   |    |    |
| Education indicator        | Net enrollment rate: primary education 84.2%, lower secondary 28.4%, upper secondary 21.2% (2017)<br>Primary education completion rate 53.6% (2017), public education budget per GDP 2.8% (2018)<br>Source: UIS   |  |            |            |               |         |               |         |                  |    |    |   |    |    |                   |    |    |   |    |    |                           |    |    |   |    |    |                           |    |    |   |    |    |
| Political instability      | From the beginning of September 2019, the basic functions of the government, medical care, and commerce have stopped due to political instability and economic crisis.<br>More than 300 million's children about 90 % of all children could not learn at school in 2019 (GPE)   |  |            |            |               |         |               |         |                  |    |    |   |    |    |                   |    |    |   |    |    |                           |    |    |   |    |    |                           |    |    |   |    |    |
| Impact of COVID-19         |   |  |            |            |               |         |               |         |                  |    |    |   |    |    |                   |    |    |   |    |    |                           |    |    |   |    |    |                           |    |    |   |    |    |
| School closure / reopening | Classes at all schools nationwide, including early childhood and preschool education, were completely closed on March 20, 2020, but reopened completely on August 9, 2020. However, it is not functioning well due to social and political instability.<br>While school closure, the school was used for another purpose. i) Isolation center for the sick, ii) Place for charging electronic devices, iii) Distribution center for school meals.<br>Face-to-face lessons were held from March to June 2021.                        |  |            |            |               |         |               |         |                  |    |    |   |    |    |                   |    |    |   |    |    |                           |    |    |   |    |    |                           |    |    |   |    |    |
| COVID-19 measures          | COVID-19 countermeasure plan formulation  |  |            |            |               |         |               |         |                  |    |    |   |    |    |                   |    |    |   |    |    |                           |    |    |   |    |    |                           |    |    |   |    |    |
| Distance education         | Implementation status   | Technical assistance is provided through a project funded by IDB, and the Ministry of Education conducts distance learning using radio, internet and television. In addition, educational content was broadcast on Haitian Creole radio, television, and YouTube in collaboration with the private sector. It is expected to develop an online learning platform in the future.  |            |            |               |         |               |         |                  |    |    |   |    |    |                   |    |    |   |    |    |                           |    |    |   |    |    |                           |    |    |   |    |    |
|                            | Access  | With only 40% of households still connected to electricity, their ability to reach the majority of the population through radio, television and internet is significantly limited. The Ministry of Education lacks the technology to develop distance learning content, so it has to rely on external partnerships to ensure service continuity.<br>School-aged children / students who can connect to the Internet at home (%) (2016-2017) <table border="1" data-bbox="587 1272 1385 1503"> <thead> <tr> <th></th> <th>Rural area</th> <th>Urban area</th> <th>Poor</th> <th>wealthy class</th> <th>Overall</th> </tr> </thead> <tbody> <tr> <td>Whole school age</td> <td>11</td> <td>36</td> <td>0</td> <td>65</td> <td>21</td> </tr> <tr> <td>Primary Education</td> <td>10</td> <td>33</td> <td>0</td> <td>60</td> <td>18</td> </tr> <tr> <td>Lower secondary education</td> <td>13</td> <td>38</td> <td>0</td> <td>71</td> <td>22</td> </tr> <tr> <td>Upper secondary education</td> <td>15</td> <td>41</td> <td>0</td> <td>64</td> <td>26</td> </tr> </tbody> </table> Source: UNICEF Global database on school-age digital connectivity |            | Rural area | Urban area    | Poor    | wealthy class | Overall | Whole school age | 11 | 36 | 0 | 65 | 21 | Primary Education | 10 | 33 | 0 | 60 | 18 | Lower secondary education | 13 | 38 | 0 | 71 | 22 | Upper secondary education | 15 | 41 | 0 | 64 | 26 |
|                            |   | Rural area   | Urban area | Poor       | wealthy class | Overall |               |         |                  |    |    |   |    |    |                   |    |    |   |    |    |                           |    |    |   |    |    |                           |    |    |   |    |    |
| Whole school age           | 11  | 36   | 0          | 65         | 21            |         |               |         |                  |    |    |   |    |    |                   |    |    |   |    |    |                           |    |    |   |    |    |                           |    |    |   |    |    |
| Primary Education          | 10  | 33   | 0          | 60         | 18            |         |               |         |                  |    |    |   |    |    |                   |    |    |   |    |    |                           |    |    |   |    |    |                           |    |    |   |    |    |
| Lower secondary education  | 13  | 38   | 0          | 71         | 22            |         |               |         |                  |    |    |   |    |    |                   |    |    |   |    |    |                           |    |    |   |    |    |                           |    |    |   |    |    |
| Upper secondary education  | 15  | 41   | 0          | 64         | 26            |         |               |         |                  |    |    |   |    |    |                   |    |    |   |    |    |                           |    |    |   |    |    |                           |    |    |   |    |    |
| Teacher training           | Supported by the National Early Childhood Education Commission through WhatsApp and the Internet.   |  |            |            |               |         |               |         |                  |    |    |   |    |    |                   |    |    |   |    |    |                           |    |    |   |    |    |                           |    |    |   |    |    |
| School hygiene             | Infection control measures  | -Campaign to raise awareness about COVID-19<br>-Setting up a virtual education platform<br>-Providing a hygiene kit to protect from COVID-19 such as water, soap and gel<br>-Emergency food support<br>-Preparation and maintenance for reopening school<br>-Strengthen institutional capacity for crisis management   |            |            |               |         |               |         |                  |    |    |   |    |    |                   |    |    |   |    |    |                           |    |    |   |    |    |                           |    |    |   |    |    |
|                            | Facility maintenance  | Water access is 40% of population can access water, with less than half of the rural population accessing safe drinking water. As of 2019, 58% of schools nationwide have basic water supply facilities and 48% of primary schools (WHO & UNICEF). Also, according to an NGO report, only 26.5% of schools have water facilities, and there is only one functional toilet in 128 students.<br><a href="https://www.educationsolidarite.org/es/salud-en-la-escuela-en-haiti-proyecto-procedh/#_ftn1">https://www.educationsolidarite.org/es/salud-en-la-escuela-en-haiti-proyecto-procedh/#_ftn1</a><br>In collaboration with the Ministry of Public Health, NGO CESAL has set up community spaces such as schools, town halls and health centers that cover more than 200,000 people in rural areas, and has set up 35 hand-washing facilities and 12  |            |            |               |         |               |         |                  |    |    |   |    |    |                   |    |    |   |    |    |                           |    |    |   |    |    |                           |    |    |   |    |    |

|                                       |  |
|---------------------------------------|--|
|                                       | drinking water tanks.. Distributed soap and chlorine, and provided basic hygiene guidance. Distribution of basic hygiene kits to over 6,000 people.  |
| School lunch / nutrition              | Funded by IDB and the World Bank, monthly school meals are distributed. The school is used as a base during the school closure period.   |
| Countermeasures for vulnerable people | Cash benefits to vulnerable families, distribution of school supplies, supplementary lessons, psychosocial activities, non-formal education for school dropouts, support for children with disabilities (UNICEF cooperation).  |
| Support for donors, etc.              | Inter-American Development Bank (IDB): US \$ 50 million grant approval to help implement the Education Sector Plan (2020 – 2030), access, quality, governance, education and learning improvements in basic education. Support for strengthening governance and institutions for the Ministry of National Education and Vocational Ability Development at the central and local levels and support for improving quality educational access in public and private schools in the six northern prefectures.<br>USAID: 1. Early literacy education, 2. Support for children and students during COVID-19, 3. Support for studying abroad at American universities, 4. Support for youth farming<br>GPE: Late March 2020 COVID-19 grant US \$ 7 million distributed through UNICEF.<br>(Purpose) To enable 350,000 children aged 5 to 14 in disadvantaged rural and urban areas to continue distance learning. (Main activities) Training for 7,000 teachers (including necessary materials), conditional cash benefit program for vulnerable groups, financial, psychological and distance learning for 1,000 children in need of special needs. For students, parents and teachers, including face-to-face programs, school kits for 350 children and teachers, 210 wash facilities to ensure safety when reopening school, and teacher training after school reopening, psychosocial support and capacity building of ministries and agencies. |

Source: Survey Team

### 13.3.3 Agriculture / rural development

|   |  |            |            |            |          |  |
|---|--|------------|------------|------------|----------|--|
| Urban / rural population ratio                    | 55.3% / 44.7% (FAOSTAT 2018)   |            |            |            |          |  |
| Agricultural land area                            | 1,840,000 ha (FAOSTAT 2019) 1)   |            |            |            |          |  |
| Agricultural sector employment                    | 29.0% of total employment (male / female ratio: n / d% / n / d%) (World Bank 2019) 2)  |            |            |            |          |  |
| Agricultural GDP                                  | 19.8% of total GDP (World Bank 2020)   |            |            |            |          |  |
| Of the agricultural sector Value added amount     | \$ 2,611,267.12 thousand (World Bank 2020) 3) * Statistics include forestry  |            |            |            |          |  |
| Agricultural sector expenditure ratio             | Ratio of agricultural fiscal expenditure to national budget (%) 4)   |            |            |            |          |  |
|   | 2018   | 2019       | 2020       |            |          |  |
|   | n / d  | n / d      | n / d      |            |          |  |
| Agricultural sector import / export balance       | Trade Balance (USD1,000 FAOSTAT) 5)  |            |            |            |          |  |
|   | 2015   | 2016       | 2017       | 2018       | 2019     |  |
| export  | 32,656   | 32,083     | 27,063     | 23,415     | 31,628   |  |
| Import  | 1,257,902  | 1,283,385  | 1,416,421  | 1,288,897  | 982,153  |  |
| Balance of payments                               | -1,225,246   | -1,251,302 | -1,389,358 | -1,265,482 | -950,525 |  |
| Agricultural development Policy / plan / strategy | <p>Haiti, one of the poorest countries in the world, has approximately 2.5 million Haitians living in extreme poverty (less than \$ 1.25 a day), mainly in rural areas (2020, USAID) 6), with small incomes. It relies heavily on family farms. Haiti's agricultural productivity is low and has barely grown over the last 50 years 7). Productivity constraints include poor rural infrastructure, volatile land ownership, lack of access to investment and technology, inadequate input and output markets, and frequent and severe climate shocks.</p> <p>The Government has formulated a Multi-Sector Agricultural Development Policy 2010-20258) with the aim of meeting the food needs of the people and promoting them in an integrated and sustainable way towards the social and economic development of the country. This agricultural development policy includes a long-term policy for food security and sustainable growth, as well as a "twin-track" approach that enables immediate remedies. As the main axes of its policy, promotion of sustainable agriculture and development and better land management, revival of agricultural production by better organization of sector, modernization of rural infrastructure, promotion of fishery and aquaculture, revival of agricultural product processing, new The promotion of marketing strategies, financing for agriculture, etc. are listed. Specific goals are to increase the country's food self-sufficiency rate from 45% to 70%, secure decent income to about 500,000 farmers, increase agricultural exports, and import ratio to 5% (2009). ) Will be raised to 50% in 2025, the land use rate in hilly and mountainous areas will be increased, and the fallow period in the crop rotation system</p> |            |            |            |          |  |

|                    |  |
|--------------------|--|
|                    | <p>will be significantly reduced.</p> <p>These goals are in line with DSNCRP-National Growth Strategy for Poverty Reduction 9) and are intended to grow the agricultural sector as the first pillar of national growth and poverty reduction.</p>  |
| Impact of COVID-19 | <p>Due to the pandemic and the subsequent economic crisis, Haiti's agricultural households have less access to means of production (materials, loans, etc.) and government support is even more restricted than usual<sup>7)</sup>. In addition, mobility restrictions and the closure of major ports pose major challenges for Haitian farmers in selling their products to domestic and international markets. This measure also affects agricultural activities, as the government limits indoor and outdoor gatherings to five people, and in rural areas the group of workers, called "ESKWAD", generally exceeds this number. It has been pointed out that it will give 10). These restrictions have serious implications for food supply, which was already volatile before the pandemic, and for national food security conditions.</p> <p>With a loan from the United Nations International Agricultural Development Fund (IFAD)<sup>11)</sup>, the government is developing an urgent project (PURRACO for French acronym) to strengthen the resilience of smallholders against the effects of COVID-19. .. The \$ 5.8 million project, led by the Ministry of Agriculture, Natural Resources and Rural Development (MARNDR), targets 3,250 poor rural households (approximately 13,000, half of whom are women and 30% are young), especially COVID-19. It focuses on supporting four Haitian provinces in the northwest, northeast, central and southern regions as vulnerable areas affected by. It also aims to restore households, increase production to levels before COVID-19, support market access, and contribute to the construction of food security by streamlining agricultural production. At the same time, the provision of short-cycle livestock products (chicken, pig, goat) is also expected to improve access to animal protein and improve nutritional status of these rural citizens.</p> <p>The Government's Post-COVID-19 Economic Revitalization Plan (PREPOC in French) 2020-2023<sup>12)</sup> plans to prioritize the transformation of agriculture and the improvement of agricultural productivity, totaling 31780. 10,000 dollars (7% of the total budget) is allocated to the agricultural sector through PREPOC. In addition, some specific funds have been re-used to support the production of short-cycle crops to improve the country's imminent food demand crisis during a pandemic 10).</p>   |
| Source / reference | <p>1) FAOSTAT-Land, Input and Sustainability-Land Use-Area-Agriculture (<a href="https://www.fao.org/faostat/en/#data/RL">https://www.fao.org/faostat/en/#data/RL</a>)</p> <p>2) <a href="https://data.worldbank.org/indicator/SL.AGR.EMPL.ZS?locations=HT&amp;view=chart">https://data.worldbank.org/indicator/SL.AGR.EMPL.ZS?locations=HT&amp;view=chart</a></p> <p>3) Agriculture, forestry, and fishing, value added (constant 2015 US \$) --Latin America &amp; Caribbean (<a href="https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart">https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart</a>)</p> <p>4) FAOSTAT-Government Expenditure-Share of Total Expenditure-Central Government (<a href="https://www.fao.org/faostat/en/#data/IG">https://www.fao.org/faostat/en/#data/IG</a>)</p> <p>5) FAOSTAT-Trade-Crops and livestock products-Import / Export Value-Agricultural Products (<a href="https://www.fao.org/faostat/en/#data/TCL">https://www.fao.org/faostat/en/#data/TCL</a>)</p> <p>6) HAITI COUNTRY PROFILE (<a href="https://www.usaid.gov/sites/default/files/documents/1862/USAID_Haiti_Country_Profile_January_2020.pdf">https://www.usaid.gov/sites/default/files/documents/1862/USAID_Haiti_Country_Profile_January_2020.pdf</a>)</p> <p>7) Future foodscapes, a changing landscape in the Haitian agricultural sector (<a href="https://blogs.iadb.org/sostenibilidad/en/future-foodscapes-a-changing-landscape-in-the-haitian-agricultural-sector/">https://blogs.iadb.org/sostenibilidad/en/future-foodscapes-a-changing-landscape-in-the-haitian-agricultural-sector/</a>)</p> <p>8) Politique de développement agricole 2010-2025 (<a href="http://faolex.fao.org/docs/pdf/hai140781.pdf">http://faolex.fao.org/docs/pdf/hai140781.pdf</a>)</p> <p>9) cument de stratégie nationale pour la croissance et la réduction de la pauvreté (DSNCRP) (<a href="https://www.ilo.org/dyn/natlex/natlex4.detail?p_isn=99565&amp;p_lang=en">https://www.ilo.org/dyn/natlex/natlex4.detail?p_isn=99565&amp;p_lang=en</a>)</p> <p>10) United States Department of Agriculture: COVID-19 Impact on agricultural sector in Haiti, May 29, 2020 (<a href="https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=COVID-19%20Impact%20on%20agricultural%20sector%20in%20Haiti_Port-au-Prince_Haiti_05-29-2020">https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=COVID-19%20Impact%20on%20agricultural%20sector%20in%20Haiti_Port-au-Prince_Haiti_05-29-2020</a>)</p> <p>11) Proyecto de Emergencia para Fortalecer la Resiliencia de los Pequeños Agricultores a las Consecuencias de la Pandemia de COVID-19 (<a href="https://www.ifad.org/es/web/operations/-/proyecto/2000003459">https://www.ifad.org/es/web/operations/-/proyecto/2000003459</a>)</p> <p>12) PLAN DE PELANCE ECONOMIQUE POST COVID 2020-2023<sup>7</sup> (<a href="https://mef.gouv.ht/docs/latest/prepoc_2020_2023.pdf">https://mef.gouv.ht/docs/latest/prepoc_2020_2023.pdf</a>)</p> |

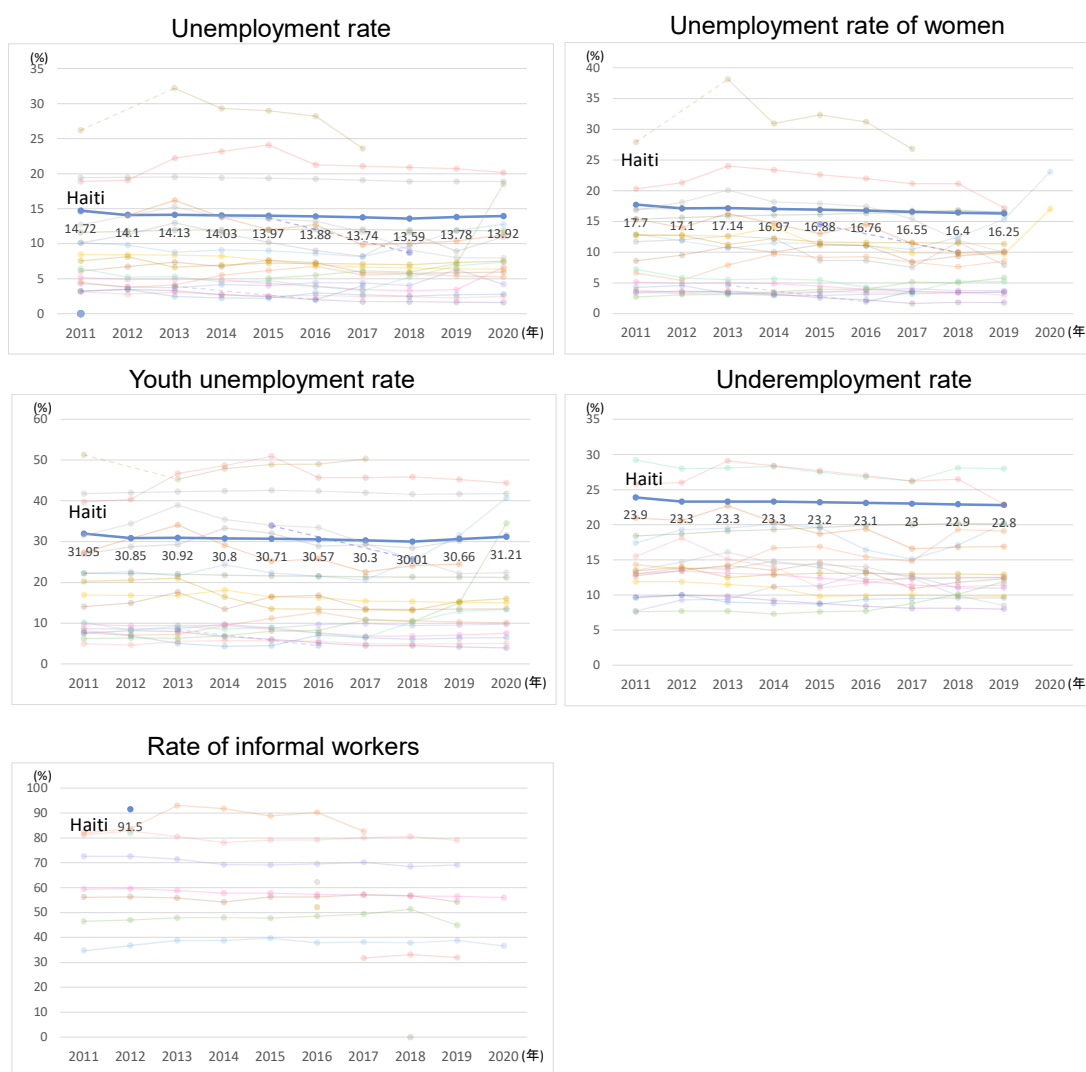
### 13.3.4 Private sector

Haiti is not a small economy (11th), but it is a developing country with the lowest GDP per capita. The minimum wage is low (19th) and the unemployment rate is high. In addition, the underemployment rate (16th) and informal worker rate (12th) are also high. It is considered to be the country with the worst employment situation overall.

|              | Index                      | Value | Ranking                 | Year | Source             |
|--------------|----------------------------|-------|-------------------------|------|--------------------|
| Productivity | GDP per capita (USD)       | 1,177 | 22 (Among 22 countries) | 2020 | World Bank         |
|              | GDP per worker (USD)       | 7,341 | 18 (Among 18 countries) | 2019 | World Bank         |
| Employment   | Minimum wage (USD / month) | 100   | 18 (Among 23 countries) | 2019 | ILO                |
|              | Unemployment rate          | 13.78 | 19 (Among 22 countries) | 2019 | Statista           |
|              | Female unemployment rate   | 16.25 | 18 (Among 22 countries) | 2019 | The Global Economy |
|              | Youth unemployment rate    | 30.66 | 18 (Among 22 countries) | 2019 | Statista           |
|              | Underemployment rate       | 22.8  | 16 (Among 18 countries) | 2019 | ILO                |
|              | Informal worker rate       | 91.5  | 12 (Among 12 countries) | 2012 | ILO                |

Source: Described in the table

Changes in unemployment rate, etc.



Source: World Bank, ILO, The Global Economy, etc.

### 13.3.5 Environment / disaster prevention

|                     | item   | data   | remarks        |
|---------------------|--|--|----------------|
| environment         | Environmental agency                                     | Ministère de l'Environnement                               |                |
|                     | Waste-related organizations                              | Metropolitan Service of Solid Waste Collection             |                |
|                     | Environmental Budget (USD)                               | 2019:-<br>2020:-<br>2021:-<br>3-year average:-             | not gotten     |
|                     | Environmental budget per capita (2019-2021 average, USD) | _____  | not gotten     |
|                     | Budget ratio to national budget (2019)                   | _____  | not gotten     |
|                     | Donor support status                                     | 8 cases  | As of May 2021 |
|                     | Renewable energy power generation (GWh) (2019)           | 103  | IRENA, 2021    |
| Disaster prevention | Geothermal power generation capacity (MWe)               | 2020: 0<br>2025 Forecast: 0                                | WGC, 2020      |
|                     | Disaster prevention organization                         | The Directorate for Civil Protection (DPC)                 |                |
|                     | Donor support status                                     | 11 cases   | As of May 2021 |
|                     | Number of natural disasters (2010-2020)                  | 25 cases<br>Major disasters: floods, earthquakes, droughts |                |

|  |  |               |                         |
|--|--|---------------|-------------------------|
|  | Number of victims (persons) per 100,000 population | 75,856 people | 1st out of 23 countries |
|--|--|---------------|-------------------------|

Source: Survey Team

### 13.3.6 Governance and citizen security

| Item  | Overview   |           |                            |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
|---|--|-----------|----------------------------|------|----------------------------|--------------------------|-----------------------------|------|-----|------|-----|------|-----|-------|------|-----|------|-----|------|-----|---|-----------------------------|------|-----|------|-----|------|-----|-------|------|-----|------|-----|------|-----|--------------------------|-----------------------------|------|-----|------|-----|------|-----|-------|------|----|------|----|------|----|--------------------|-----------------------------|------|-----|------|-----|------|-----|-------|------|-----|------|-----|------|-----|-------------|-----------------------------|------|-----|------|-----|------|-----|-------|------|-----|------|-----|------|-----|-----------------------|-----------------------------|------|-----|------|-----|------|-----|-------|------|-----|------|-----|------|-----|
| Political system                                      | Constitutional republic  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
| Election system                                       | The president is directly elected by a general vote of absolute majority system. President Moïse was assassinated on July 7, 2021, and Ariel Henry took over the presidency from July 20, 2021.  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
| Legislative system                                    | Bicameral system   |           |                            |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
| Most recent / next legislative election               | Senate: November 20, 2016<br>House of Representatives: August 9, 2015  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
| Appointment of judicial system / judge                | Judges are appointed by the President from a list of candidates submitted by the Senate of the National Assembly.  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
| Political stability                                   | Haiti faces the challenges of political and social instability, including the recovery from the 2010 earthquake, the impact of COVID-19, and the assassination of the President Moïse in July 2021.  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
| “Worldwide Governance Indicators”                     | <p>The overall performance of governance is very low, especially the "government effectiveness". Furthermore, the level at which the basic rights of the people are guaranteed is low.</p> <table border="1"> <caption>Worldwide Governance Indicators (WGI) Data (Estimated Percentile Ranks)</caption> <thead> <tr> <th>Indicator</th> <th>Country</th> <th>Year</th> <th>Percentile Rank (0 to 100)</th> </tr> </thead> <tbody> <tr> <td rowspan="6">Voice and Accountability</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Haiti</td> <td>2010</td> <td>~15</td> </tr> <tr> <td>2019</td> <td>~15</td> </tr> <tr> <td>2020</td> <td>~15</td> </tr> <tr> <td rowspan="6">Political Stability and Absence of Violence/Terrorism</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Haiti</td> <td>2010</td> <td>~15</td> </tr> <tr> <td>2019</td> <td>~15</td> </tr> <tr> <td>2020</td> <td>~15</td> </tr> <tr> <td rowspan="6">Government Effectiveness</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Haiti</td> <td>2010</td> <td>~5</td> </tr> <tr> <td>2019</td> <td>~5</td> </tr> <tr> <td>2020</td> <td>~5</td> </tr> <tr> <td rowspan="6">Regulatory Quality</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Haiti</td> <td>2010</td> <td>~15</td> </tr> <tr> <td>2019</td> <td>~15</td> </tr> <tr> <td>2020</td> <td>~15</td> </tr> <tr> <td rowspan="6">Rule of Law</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Haiti</td> <td>2010</td> <td>~15</td> </tr> <tr> <td>2019</td> <td>~15</td> </tr> <tr> <td>2020</td> <td>~15</td> </tr> <tr> <td rowspan="6">Control of Corruption</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Haiti</td> <td>2010</td> <td>~15</td> </tr> <tr> <td>2019</td> <td>~15</td> </tr> <tr> <td>2020</td> <td>~15</td> </tr> </tbody> </table> | Indicator | Country                    | Year | Percentile Rank (0 to 100) | Voice and Accountability | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Haiti | 2010 | ~15 | 2019 | ~15 | 2020 | ~15 | Political Stability and Absence of Violence/Terrorism | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Haiti | 2010 | ~15 | 2019 | ~15 | 2020 | ~15 | Government Effectiveness | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Haiti | 2010 | ~5 | 2019 | ~5 | 2020 | ~5 | Regulatory Quality | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Haiti | 2010 | ~15 | 2019 | ~15 | 2020 | ~15 | Rule of Law | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Haiti | 2010 | ~15 | 2019 | ~15 | 2020 | ~15 | Control of Corruption | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Haiti | 2010 | ~15 | 2019 | ~15 | 2020 | ~15 |
| Indicator   | Country  | Year      | Percentile Rank (0 to 100) |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
| Voice and Accountability                              | * Latin America & Caribbean  | 2010      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
|   |  | 2019      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
|   |  | 2020      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
|   | Haiti  | 2010      | ~15                        |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
|   |  | 2019      | ~15                        |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
|   |  | 2020      | ~15                        |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
| Political Stability and Absence of Violence/Terrorism | * Latin America & Caribbean  | 2010      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
|   |  | 2019      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
|   |  | 2020      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
|   | Haiti  | 2010      | ~15                        |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
|   |  | 2019      | ~15                        |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
|   |  | 2020      | ~15                        |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
| Government Effectiveness                              | * Latin America & Caribbean  | 2010      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
|   |  | 2019      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
|   |  | 2020      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
|   | Haiti  | 2010      | ~5                         |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
|   |  | 2019      | ~5                         |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
|   |  | 2020      | ~5                         |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
| Regulatory Quality                                    | * Latin America & Caribbean  | 2010      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
|   |  | 2019      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
|   |  | 2020      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
|   | Haiti  | 2010      | ~15                        |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
|   |  | 2019      | ~15                        |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
|   |  | 2020      | ~15                        |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
| Rule of Law   | * Latin America & Caribbean  | 2010      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
|   |  | 2019      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
|   |  | 2020      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
|   | Haiti  | 2010      | ~15                        |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
|   |  | 2019      | ~15                        |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
|   |  | 2020      | ~15                        |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
| Control of Corruption                                 | * Latin America & Caribbean  | 2010      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
|   |  | 2019      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
|   |  | 2020      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
|   | Haiti  | 2010      | ~15                        |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
|   |  | 2019      | ~15                        |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
|   |  | 2020      | ~15                        |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
| Global freedom status                                 | 37/100 points (citizen rights: 15/40 points, political rights: 22/60 points)<br>Classified as a "partially free country" (Freedom House 2021).   |           |                            |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
| Corruption Perception Index (CPI)                     | N / A  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
| E-government development index                        | Haiti's e-Government Development Index is low. Digital national IDs have been issued, but as of 2017, 27.46% (more than 2 million people) of the population have not been granted national IDs.  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
| Rule of law   | The criminal justice system lacks the resources, independence and integrity needed to ensure the physical safety of its citizens through proper procedures. Excessive police use of force against anti-government protests is frequent (Freedom House 2021).   |           |                            |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |
| Citizen security                                      | The homicide rate is lower than the regional average but still higher than the world average. The homicide rate in 2016 was 9.5 / 100,000 (the same year, the Caribbean average was 14.3, and the world average was 6) (UNODC 2021).   |           |                            |      |                            |                          |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |       |      |    |      |    |      |    |                    |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |       |      |     |      |     |      |     |

Source: Survey Team

### 13.3.7 DX / Innovation

| <p>Basic indicators and statistics</p>   | <p>E-government ranking 1): 180th<br/>         Mobile connection index 2): 32.8<br/>         Network Infrastructure Index: 33.2<br/>         Internet user rate 37.3<br/>         Mobile connection rate 64.3<br/>         Fixed broadband rate 0.3<br/>         Rate of increase in the number of Internet users 16.3 (2021/2020)</p> | <p>Radar chart of e-government ranking</p> <table border="1"> <caption>Radar Chart Data</caption> <thead> <tr> <th>Index</th> <th>Haiti</th> <th>Caribbean</th> <th>Central America</th> </tr> </thead> <tbody> <tr> <td>OSI</td> <td>0.1882</td> <td>0.4</td> <td>0.6</td> </tr> <tr> <td>TII</td> <td>0.2448</td> <td>0.4</td> <td>0.6</td> </tr> <tr> <td>HCI</td> <td>0.3859</td> <td>0.4</td> <td>0.6</td> </tr> </tbody> </table> | Index           | Haiti | Caribbean | Central America | OSI | 0.1882 | 0.4 | 0.6 | TII | 0.2448 | 0.4 | 0.6 | HCI | 0.3859 | 0.4 | 0.6 |
|--|--|---|-----------------|-------|-----------|-----------------|-----|--------|-----|-----|-----|--------|-----|-----|-----|--------|-----|-----|
| Index  | Haiti  | Caribbean   | Central America |       |           |                 |     |        |     |     |     |        |     |     |     |        |     |     |
| OSI  | 0.1882   | 0.4   | 0.6             |       |           |                 |     |        |     |     |     |        |     |     |     |        |     |     |
| TII  | 0.2448   | 0.4   | 0.6             |       |           |                 |     |        |     |     |     |        |     |     |     |        |     |     |
| HCI  | 0.3859   | 0.4   | 0.6             |       |           |                 |     |        |     |     |     |        |     |     |     |        |     |     |
| <p>Communication network</p>   |  |   |                 |       |           |                 |     |        |     |     |     |        |     |     |     |        |     |     |
| <p>Haiti's Network Infrastructure Index is 33.2, well below the average of 56.8 in Latin America and the Caribbean. The factors are largely influenced by the original political and economic turmoil and natural disasters. Hurricane Matthew, which struck the island in August 2016, has recently caused damage to the telecommunications sector, with market-entry companies Natcom, Digicel, and Access Haiti owning equipment damage of approximately \$ 35 million. There is a report that it was 3).</p> <p>In the Internet market, poor fixed-line infrastructure as backbone networks meant that most enterprises had to rely on satellite and wireless technologies. With the launch of fixed broadband services by Natcom in the latter half of 20114), there was some movement in this sector as well, but the penetration rate in 20195) was 0.3%, compared to the regional average of 14.0%. It is in an extremely low state. The company owns over 6,000 km of fiber optic cables, 1,550 base stations (2G and 3G), covering 93% of the country6), but with significant differences in connection speed over mobile networks. Not 7), so it is less attractive to individual consumers or businesses.</p> <p>Natcom entered the mobile sector in 20114), laying the foundation for competitiveness in the sector market, and in 2012 Digicel acquired the local company Comcel (mobile brand name: Volia) 8), 2013. It is in an oligopolistic state, such as the sale of assets due to the bankruptcy of HaiTel, which was the third operator9) (the market share of about 74% of the subscribers was transferred to Digicel). Digicel's future LTE promotion business through innovative mobile data services such as mobile banking 10), and a clean energy business targeting rural areas where electricity is still inadequate 11), The community is expected to improve its fixed-line infrastructure and mobile Internet services.</p>   |  |   |                 |       |           |                 |     |        |     |     |     |        |     |     |     |        |     |     |
| <p>National Strategy for Digital Transformation</p>  |  |   |                 |       |           |                 |     |        |     |     |     |        |     |     |     |        |     |     |
| <p>The Haiti Strategic Development Plan (PSDH) 12) selects national development factors for developing into emerging countries towards 2030, demographically, geographically, economically, socially and legally. It sets goals to be achieved from a standpoint and details major projects for Haiti's reconstruction and development.</p> <p>The national information and communication technology (ICT) promotion policy is described in the "Regional Communication and Digital Network Program (1.7)" included in the "National Land Reconstruction Program". There are concerns about the widening of the digital gap between urban and rural areas in connection with measures against poverty in the country, and efforts are being made to promote the introduction of ICT in rural areas in order to correct the disparity. In addition, the expansion of regional communications and digital networks will support the mobilization of a wide range of services such as mobile banking, mobile transfer, mobile TV, digital development centers, call centers, and teleservices, and ICT for personal use as well as commercial use. There is a need to promote the development of services.</p>  |  |   |                 |       |           |                 |     |        |     |     |     |        |     |     |     |        |     |     |
| <p>Characteristic efforts</p>  |  |   |                 |       |           |                 |     |        |     |     |     |        |     |     |     |        |     |     |
| <p>The impact of COVID-19 has revealed that most governments, businesses and individuals are not ready to work remotely, raising concerns about the deterioration of the digital divide. As a countermeasure, the government is implementing a program to increase access to broadband services and establish a digital resilience foundation for emergency response with a loan of 60 USD millions from the World Bank 13).</p> <p>Its subprogram also includes the purchase of dedicated network services to build one or more government wide area networks (GWANs) that allow government agencies across the country to interconnect. In addition, the development cost of monitoring software for basic IT equipment in government facilities is also included, and measures are taken to increase resilience, such as building a system for switching to an emergency power supply.</p>  |  |   |                 |       |           |                 |     |        |     |     |     |        |     |     |     |        |     |     |
| <p>source</p>  |  |   |                 |       |           |                 |     |        |     |     |     |        |     |     |     |        |     |     |
| <ol style="list-style-type: none"> <li>20. E-Gov-Index: a composite indicator that consists of three indexes (Online Service Index, Telecommunication Infrastructure Index and Human Capital Index), which are equally weighted. It ranges from 0 to 1, with 1 being the most developed.</li> <li>21. Mobile Connectivity Index: an input index developed by GSMA to measure the performance against the four key enablers of mobile internet adoption – infrastructure, affordability, consumer readiness and content. (<a href="https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2016/06/Mobile-Connectivity-Launch-Report.pdf">https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2016/06/Mobile-Connectivity-Launch-Report.pdf</a>)</li> <li>22. summary of the damages and costs estimated in the telecom sector <a href="https://www.haitilibre.com/docs/perte-telecom-matthew.pdf">https://www.haitilibre.com/docs/perte-telecom-matthew.pdf</a></li> <li>23. Natcom officially launches services <a href="https://www.commsupdate.com/articles/2011/09/09/natcom-officially-launches-services/">https://www.commsupdate.com/articles/2011/09/09/natcom-officially-launches-services/</a></li> <li>24. Fixed broadband subscriptions (per 100 people) --Latin America &amp; Caribbean, Haiti <a href="https://data.worldbank.org/indicator/IT.NET.BBND.P2?locations=ZJ-HT">https://data.worldbank.org/indicator/IT.NET.BBND.P2?locations=ZJ-HT</a></li> <li>25. National Telecom SA <a href="https://natcom.com.ht/about/14997596">https://natcom.com.ht/about/14997596</a></li> <li>26. <a href="https://www.speedtest.net/global-index/haiti">https://www.speedtest.net/global-index/haiti</a></li> <li>27. Digicel acquires Voila in HaitiBTC 4G rollout nears completion <a href="https://www.commsupdate.com/articles/2012/04/03/digicel-acquires-voila-in-haiti/">https://www.commsupdate.com/articles/2012/04/03/digicel-acquires-voila-in-haiti/</a></li> <li>28. Haitel liquidation process enters second phase <a href="https://www.commsupdate.com/articles/2013/10/15/haitel-liquidation-process-enters-second-phase/">https://www.commsupdate.com/articles/2013/10/15/haitel-liquidation-process-enters-second-phase/</a></li> <li>29. Digicel Haiti revamps mobile money as'Mon Cash' <a href="https://www.commsupdate.com/articles/2015/08/18/digicel-haiti-revamps-mobile-money-as-mon-cash/">https://www.commsupdate.com/articles/2015/08/18/digicel-haiti-revamps-mobile-money-as-mon-cash/</a></li> <li>30. Case Study Green Power Feasibility Study – Digicel, Haiti</li> </ol> |  |   |                 |       |           |                 |     |        |     |     |     |        |     |     |     |        |     |     |



|     |  |
|-----|--|
| 31. | <a href="https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2012/06/Digicel-Haiti.pdf">https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2012/06/Digicel-Haiti.pdf</a><br>Plan Stratégique de Développement d'Haiti   |
| 32. | <a href="http://observatorioplanificacion.cepal.org/sites/default/files/plan/files/Haiti_PLAN_STRAT%C3%89GIQUE_de_developpement_tome1.pdf">http://observatorioplanificacion.cepal.org/sites/default/files/plan/files/Haiti_PLAN_STRAT%C3%89GIQUE_de_developpement_tome1.pdf</a><br>Haiti Digital Acceleration Project (P171976)<br><a href="https://projects.worldbank.org/en/projects-operations/project-detail/P171976">https://projects.worldbank.org/en/projects-operations/project-detail/P171976</a> |

### 13.3.8 Infrastructure and Energy

|   |  |
|---|--|
| <b>Transport</b>                          |  |
| Overview                                  | Inland transportation is mainly by car.<br>The main public transportation is buses and taxis. There are domestic air routes. There is no railroad. |
| Leadership governance                     | Ministry of Public Works, Transportation and Communications  |
| Major development partners                | JICA / UNDP / IADB / USAID   |
| <b>Energy and electricity</b>             |  |
| Overview                                  | Imported coal and oil will account for 93% of the electricity energy mix in 2019.  |
| Carbon neutral national plan              | No information<br>Goal: 47% Renewable Energy Generation (NDC) by 2030  |
| Leadership governance and utility company | Ministry of Public Works, Transportation and Communications<br>Electricity of Haiti (EDH)  |
| Major development partners                | JICA / WB / UNDP / IADB  |

Source: JICA Study Team with reference to various websites of the government organization and international organization (WB / IEA / IRENA / US DOE).

### 13.3.9 Tourism

COVID-19 has a large impact on employment for its dependence on the tourism industry.

|   |  |   |
|---|--|---|
| Number of international tourist arrivals (2019) |  | 286,000   |
| International Tourism Receipts (2019)           |  | USD 450 million   |
| Tourism Competitiveness Ranking (2019)          |  | 2.8 out of 7 (133rd out of 140 countries)<br>Highly rated field: International openness (3.9 out of 7 points, 50th out of 140 countries)<br>Low-rated areas: Environmental sustainability (3.3 out of 7 points, 140th out of 140 countries) |
| Tourism Dependency Index (2019)                 |  | 16.4 (47th out of 166 countries)  |
| Government of Japan policy                      | Number of JICA projects in the last 10 years   | none  |
|   | References to the Country Assistance Policy  | none  |
|   | Interest in pilot projects   | N / A   |
| Tourism industry vulnerability                  | Contribution of Travel & Tourism to GDP (2019)   | 8.4% (19th out of 23 countries)   |
|   | Contribution of Travel & Tourism to employment (2019)  | 8.6% (19th out of 23 countries)   |
|   | Ratio of international spending (2019)   | 56% (16th out of 23 countries)  |
|   | Top 3 countries of origin of visitors (2019)   | USA (78.40%)<br>Canada (7.31%)<br>Cuba (5.30%)  |
| Importance of tourism                           | Ratio of the budget amount of tourism-related ministries to the national budget amount (2019)            | 0.2% (12th out of 16 countries)<br>National budget: HTG 198,700,000,000<br>Budget of tourism-related ministries: HTG 356,832,759  |
|   | Whether or not it is mentioned as a priority sector in the National Economic and Social Development Plan | Yes<br>Plan name: Plan Strategique de Developpement D'Haiti.Pays Emergent en 2030<br>Reference example: Le Grand chantier no 2: Program 2.6 in La refondation économique: Appuyer le développement du tourisme (p. 162)                     |
|   | Existence of effective national tourism policies / strategies / plans                                    | none  |



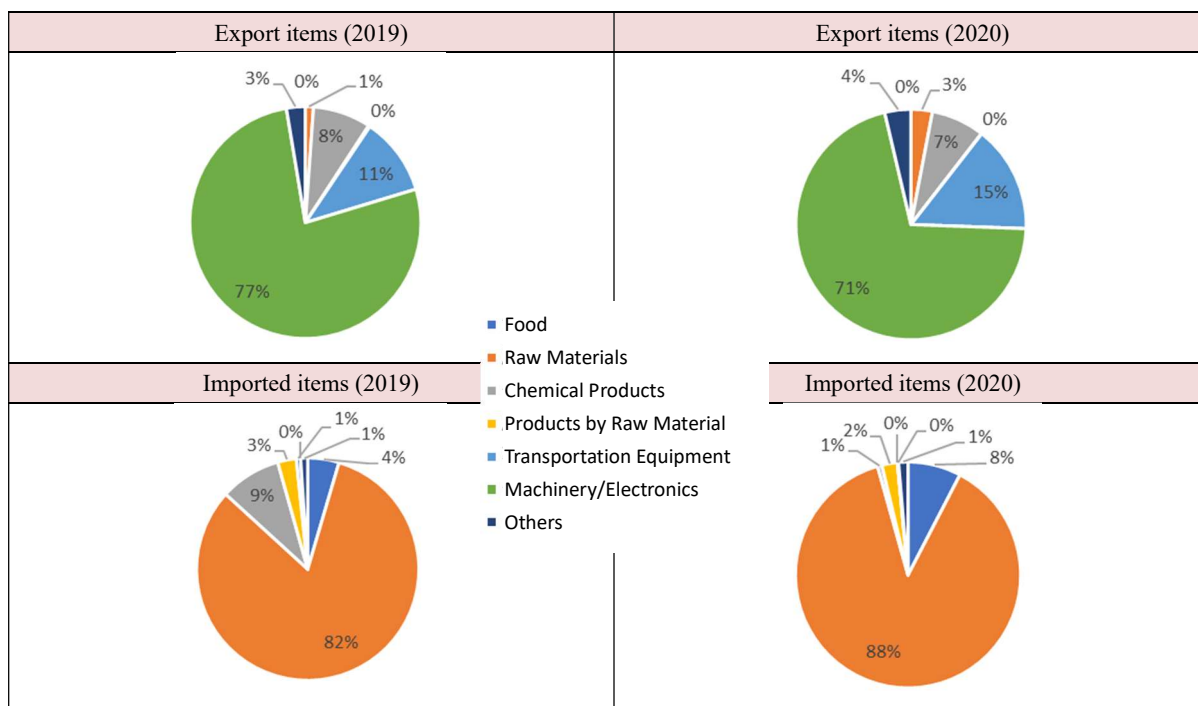
|  |   |   |
|--|---|---|
| Impact of COVID-19   | Changes in the contribution of Travel & Tourism to GDP (2019 → 2020)        | -66.9% (6th out of 23 countries)                          |
|  | Changes in the contribution of Travel & Tourism to employment (2019 → 2020) | -32.7% (3rd out of 23 countries)                          |
| Number of government support measures for the tourism sector |   | 8 (Fiscal policy: 2, employment and skills: 1, others: 5) |

Source: Survey Team

### 13.3.10 Public-private partnership

| item   |  | Contents    |
|--|--|-------------|
| No. of JICA Public-Private Partnership Projects (After 2012)                 | Cooperation preparatory survey (overseas investment and financing) (former PPP infrastructure project)           | 0 cases     |
|  | Overseas investment and loan   | 0 cases     |
|  | SME Partnership Promotion Survey (support for Small-sized Enterprise)  | 0 cases     |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for small- and medium- sized enterprise) | 0 cases     |
|  | SDGs Business Verification Survey with Private Sector (support for small- and medium- sized enterprise)          | 0 cases     |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for large enterprise)                    | 0 cases     |
|  | SDGs Business Verification Survey with Private Sector (support for large enterprise)                             | 0 cases     |
| Total number of Japanese private companies entering the market (2019 survey) | Total number of business locations   | 6 companies |
|  | Overseas branches of Japanese companies,   | 5 companies |
|  | Local corporations wholly owned by Japanese companies and their branches   | 0 companies |
|  | Branch offices wholly owned by Japanese companies and their branches   | 0 companies |
|  | joint ventures (local corporations in which Japanese companies have a direct or indirect stake of 10% or more)   | 0 companies |
|  | joint ventures (Branch offices in which Japanese companies have a direct or indirect stake of 10% or more)       | 0 companies |
|  | companies established overseas by Japanese nationals (in which Japanese nationals have a stake of 10% or more)   | 1 company   |
|  | Unknown classification   | 0 companies |
| Number of Japanese residents (2020 survey)                                   | Total  | 44 people   |
|  | Long-term residents  | 33 people   |
|  | Permanent resident   | 11 people   |
| Business Environment   | Doing Business 2020 Rank   | 179th       |
| PPP Project  | Existence of PPP law scheme  | ×           |
|  | PPP project with Japanese companies  | 0 cases     |





### Gathering information about the PPP system

| N°  | Task Item   | Inquiries/comments/status<br>Title of submitted file   | Source/URL  |
|-----|---|--|---|
| 1   | <b>PRIORITY 4_PPP Sector</b>  |  |   |
| 1.1 | PPP Projects in selective countries<br>PPP rules and regulations in Central America and Caribbean Countries |  | All below can be useful   |
| A   | PPP laws and Regulations<br>if there is any, when, and how  | There is none, but they are in the process of developing a law   | <a href="https://pppknowledgelab.org/countries/haiti">https://pppknowledgelab.org/countries/haiti</a><br><a href="https://publications.iadb.org/publications/english/document/The_Governance_of_Public-Private_Partnerships_A_Comparative_Analysis.pdf_(pag.11)">https://publications.iadb.org/publications/english/document/The_Governance_of_Public-Private_Partnerships_A_Comparative_Analysis.pdf_(pag.11)</a>  |
| B   | PPP Unit Organization<br>if there is any, how structured  | No information found   |   |
| C   | PPP sectors<br>in what sectors are the PPPs allowed   | Data available can say that there are allowed:<br>- ICT<br>- Energy<br>- Water and sewerage<br>- Transport<br><br>There was no information of a project in the sector of Municipal Solid Waste | <a href="https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CNI%2CLC&amp;header=true">https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CNI%2CLC&amp;header=true</a> |
| D   | Proposal Types (Solicited or Unsolicited)<br>unsolicited  | The PPP Proposal Types with the data available shows that there were no unsolicited proposals  | <a href="https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2C">https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2C</a>   |
| E   | PPP Forms<br>BOT,BTO,DB,,,what form are allowed   | The PPP forms with data available:<br>- BOO<br>- BOT<br>- M<br>- MC<br>- R<br>See file "210520_PPP Database" sheet "Resume PPP"  | <a href="https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CNI%2CLC&amp;header=true">https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CNI%2CLC&amp;header=true</a> |
| F   | PPP types<br>Availability payment, service purchase   | There is no public information on the subject.   |   |
| G   | PPP Project Trends<br>how much PPP projects in the last 10 years  | 2 (2010 to 2020)<br>- NatCom (2011)<br>- Port Lafito (2014)<br>See file "210520_PPP Database"  | <a href="https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CU&amp;header=true">https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CU&amp;header=true</a>   |
| H   | Participation of Japanese firms in PPP Projects<br>if any (check news source)                               | No information found   |   |
| I   | Any notable points for each country<br>if any   |  |   |

Source: Survey Team

## 14. Honduras

### 14.1 Country overview (basic information)

#### 14.1.1 Basic information

Republic of Honduras (Spanish: República de Honduras), commonly known as Honduras, is a republican nation located in central Central America. It borders Guatemala to the west, El Salvador to the southwest, and Nicaragua to the southeast, facing the Pacific Ocean via the Caribbean Sea to the north and east and the Gulf of Fonseca to the south. The border was established by the United States arbitration with Guatemala in 1933, with El Salvador in 1992, and with Nicaragua in 2007 by the International Court of Justice. In addition to the continental part, it owns the Swan Islands and the Bay Islands on the Caribbean coast. Honduras is historically the poorest country in Central America, along with Nicaragua. The economy has relied on the banana plantation industry, which was started by United States-owned United Fruit and Standard Fruit in the tropical lowlands of the Caribbean coast. Bananas required a lot of labor, so black workers migrated from Jamaica as a labor force for railway construction and plantations. Palestinians, Arabs, Chinese, Vietnamese, Japanese, etc. were also migrated. Since the mid-1970s, many Hondurans have gone abroad in search of jobs, and many have relatives living in Mexico, Nicaragua, Spain, Canada, and especially the United States.

#### 14.1.2 General circumstances

|             |  |                 |  |
|-------------|--|-----------------|--|
| 1 area      | 112,490 square kilometers (about one-third of Japan) | 2 Population    | 9.59 million people (2018 World Bank)                  |
| 3 Capital   | Tegucigalpa City                                     | 4 ethnic groups | Mixed race 91%, indigenous 6%, African 2%, European 1% |
| 5 languages | Spanish  | 6 religion      | Mainly Catholic  |

Source: Ministry of Foreign Affairs HP Honduras Republic Basic Data

#### 14.1.3 Economic overview

|                          |   |                              |   |
|--------------------------|---|------------------------------|---|
| 1 Major industry         | Agriculture, forestry and fisheries (coffee, banana, palm oil, farmed shrimp, etc.), sewing industry, tourism   | 2 GDP<br>3 GNI / person      | US \$ 23.97 billion (2018, World Bank)<br>US \$ 5,520 (2019, WDI) |
| 4 Economic growth rate   | 3.3% (2019, World Bank)   | 5 Unemployment rate          | 5.39 (2019, ILO)  |
| 6 Price increase rate    | 4.08% (2019, Central Bank)  |                              |   |
| 7 Total trade amount     | Exports (FOB): US \$ 8,714.9 million (Bank of 2019) (including Makira industry)<br>Imports (CIF): 11,853.9 million US dollars (2019, Central Bank) (including Makira industry)  |                              |   |
| 8 Major trade items      | Export: Coffee, banana, palm oil, farmed shrimp<br>Imports: Fuels, mechanical / electrical parts and related products, chemical industry products (2019, Central Bank)  |                              |   |
| 9 Major trading partners | Exports: 1st US (36.0%), 2nd El Salvador (8.4%), 3rd Germany (7.2%), (Japan (0.7%))<br>Imports: 1st US (35.0%), 2nd China (15.0%), 3rd Guatemala (7.1%), (Japan (1.5%)) (2019, Central Bank)  |                              |   |
| 10 currencies            | Lempira   | 11 Foreign currency reserves | na  |
| 12 National budget       | USD10,990,498,233 (2019)  | 13 External debt balance     | \$ 7,699 million (2019, Central Bank)                             |
| 14 Economic overview     | The dependence on traditional industries such as coffee and bananas is still high, but in order to break away from this, we are trying to foster new industries, and the manufacturing industry (especially textiles) and tourism industry in Makira (bonded processing zone) are attracting attention. There is. Most of the remittances are from Hondurans in the United States (about 1 million people), and the remittance amount in 2019 is about 5.4 billion dollars (equivalent to about 20% of GDP). In 2006, the US-Central America-Dominican Republic Free Trade Agreement (DR-CAFTA) came into effect. The Central America-EU Cooperation Agreement came into effect in August 2013. In October 2016, applied for official membership in the Pacific Alliance. The Central America / Korea FTA came into effect in October 2019. Hurricane Mitch, which struck Central America in 1998, suffered unprecedented damage of about 3.6 billion dollars (about 68% of the nominal GDP in 1998), but it was reconstructed with the support of the international community including Japan. |                              |   |

|  |  |
|--|--|
|  | It is a target country of the Extended Heavily Indebted Poor Countries (HIPC) initiative, and was approved by the IMF Board of Directors in March 2005 and the World Bank Board of Directors in April of the same year, and was approved by an international organization (pledge amount is about). Debt forgiveness will be implemented by each country (planned amount of 940 million dollars). Japan has provided debt forgiveness totaling approximately 58.1 billion yen. |
|--|--|

Source: Ministry of Foreign Affairs HP Honduras Republic Basic Data

## 14.1.4 Country-specific development cooperation policy

### (1) Government of Japan Development Cooperation Policy by Country

**Table 14-1 Overview of Japan's ODA to Honduras**

|   |  |
|---|--|
| <b>1. 1. Overview</b>   |  |
| Japan's economic cooperation for Honduras began around 1970 with grant-aid and loan aid, and from 1975, with the conclusion of the Japan Overseas Cooperation Volunteers (JOCV) dispatch arrangement, full-scale technical cooperation support began. In recent years, it has focused on support in areas such as regional development and disaster prevention measures, with a focus on grant-aid for aid and technical cooperation.   |  |
| <b>2. 2. Aim of development cooperation</b>   |  |
| Honduras has issues such as deteriorating security and natural disasters in addition to its fragile economic structure that depends on commodities, but it has set long-term national development goals and is actively working on its own issues. Japan's support for its efforts, ensuring its stability and supporting its economic development, in addition to strengthening traditionally friendly bilateral relations, will help stabilize and prosper Central America as a whole through regional integration. It is also significant from the viewpoint of.   |  |
| <b>3. 3. Basic policy</b>   |  |
| The basic policy is to support sustainable socio-economic development centered on local revitalization measures. Honduras' National Vision 2010-2038 sets out 22 priority items such as "poverty alleviation," "employment creation," and "sustainable and environmentally friendly development," while encouraging the participation of local governments and local residents. , Focuses on more effective development that meets the needs of the region. Japan will provide support with an emphasis on alleviating economic and social disparities and disaster prevention, with a particular focus on reducing poverty in rural areas and improving fragile industrial structures. |  |
| <b>4. Priority areas</b>  |  |
| (1) Local development: We will provide support centered on the development of local industries and the development of human resources necessary for that purpose, in order to alleviate serious poverty problems.<br>(2) Disaster prevention measures: Since 80% of the national land is mountainous areas and natural disasters such as hurricanes, which are suspected of being affected by climate change, have occurred frequently in recent years, we will particularly support the establishment of disaster prevention and disaster countermeasure systems.  |  |

Source: Ministry of Foreign Affairs HP Honduras Country Data Collection 2017

**Table 14-2 National Development Cooperation Policy for Honduras (April 2012)**

|   |   |
|---|---|
| <b>3. 3. Priority field (medium goal)</b> |   |
| (1) Local development                     | We will provide support centered on the development of local industries and the development of human resources necessary for that purpose, and will endeavor to provide support in the fields of health care and primary education in cooperation with other countries and international organizations. |
| (2) Disaster prevention measures          | Since 80% of the country is mountainous and natural disasters such as hurricanes, which are suspected of being affected by climate change, occur frequently in recent years, we will support the establishment of disaster prevention and disaster countermeasure systems in particular.                |
| (3) Others                                | The economy of Honduras is highly dependent on primary products such as coffee and bananas, and in order to improve its fragile structure, it aims to attract new industries such as attracting overseas manufacturing industries and tourism in the bonded processing zone (Makira). There is.         |

Source: Survey Team

### (2) Development partner survey results

We extracted sector names and specific quantitative figures that have a large impact on the country-specific analysis described in various reports of development partners. Reports from the World Bank, OECD, BCIE, SICA, and the Ministry of Economy, Trade and Industry of Japan suggest the importance of introducing digitalization and innovation (Fintech, Aggrotech, Autotech, etc.), and incorporate the survey results of these development partners. I arranged it accordingly.

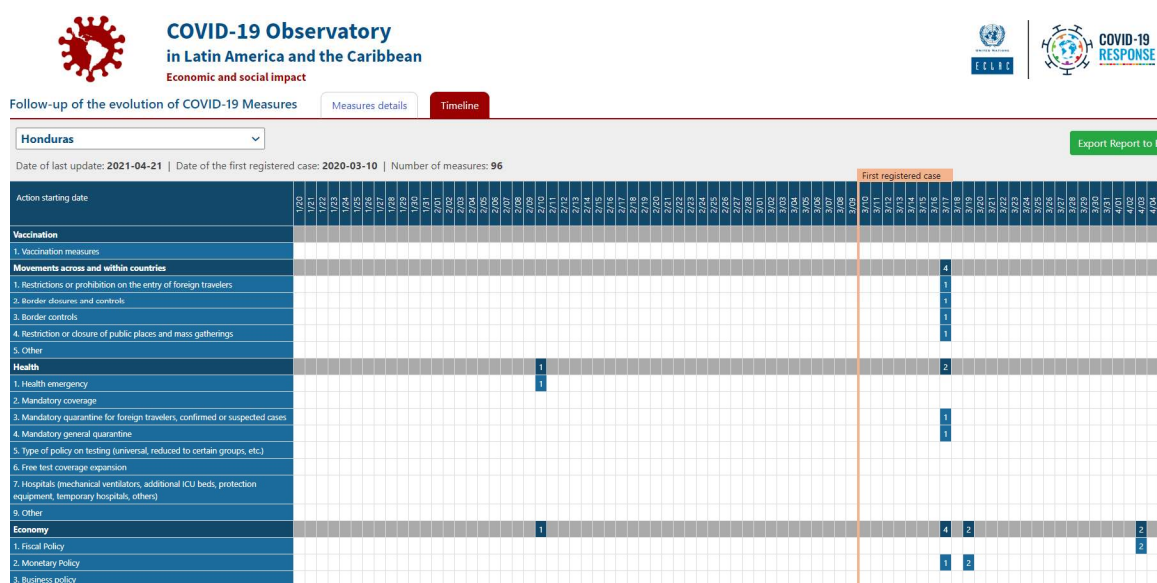
World Bank: "Growth and Revitalization" 2021 Semi-Annual Economic Report (March 2021)

- ✓ OECD: COVID-19 in LAC, Regional socio-economic implications and policy priorities (December 2020)

- ✓ BCIE: Impacto Económico del COVID-19 (April 2020)
- ✓ SICA: Estimación del Impacto Económico del COVID-19 en Centroamérica y República Dominicana (April 2020)
- ✓ Ministry of Economy, Trade and Industry of Japan: "Economic and Industrial Policy Based on the Impact of the New Corona Virus" (June 2020), Accelerating Digitization and Onlineization, Gig Economy, Innovation in the Transition to a New Everyday Life 1) Medical care / health, 2) Digital: Infrastructure development premised on the arrival of a digital society, 3) Green: Response to climate change problems, Energy security, 4) Emphasizes resilience.

### 14.1.5 Policies for COVID-19 measures taken by governments of each country

Various policies for COVID-19 taken by the government are described on the ECLAC homepage "COVID-19 Observatory" by country, time series, and field, and can be analyzed.



Source: <https://cepalstat-prod.cepal.org/forms/covid-countrysheet/index.html?table=2&country=HND>

In this survey, the 58 policies in Honduras listed on this website were classified by sector as much as possible.

#### 1) Infection spread and alleviation of aggravation and death

No material was available.

#### 2) Support for affected industries and people

**Table 14-3 Support for Affected Industries and People (Honduras)**

| Various government policies (COVID-19 Observatory for LAC) |    |
|--|----|
| Socioeconomic policy                                       | 24 |
| Health care & nutrition                                    | 15 |
| Education  | 1  |
| Agriculture & rural development                            | 0  |
| Private sector   | 6  |
| Environment & disaster prevention                          | 0  |
| Governance and social security                             | 8  |
| DX and innovation  | 0  |
| Infrastructure & energy                                    | 0  |
| Tourism  | 0  |
| PPP  | 0  |
| Others (b)   | 4  |
| total  | 58 |

Source: Survey Team

### 3) Arrangement of various policies for COVID-19 taken by the government

COVID-19 Observatory for Latin America and Caribbean (ECLAC) organized by governments

**Table 14-4 Government-directed COVID-19 Policy Categories (Honduras)**

#### Follow-up of the evolution of COVID-19 Measures

| Vaccination   | Economy  | Social protection   |
|---|--|---|
| 1. Vaccination measures   | 1. Fiscal Policy   | 1. Cash transfers (new transfers, increase in existing transfers, expansion of cash transfers to new recipients, early disbursement of transfers) |
| <b>Movements across and within countries</b>  | 2. Monetary Policy   | 2. Food transfers / In-kind transfers   |
| 1. Restrictions or prohibition on the entry of foreign travelers  | 3. Business policy   | 3. Guarantee of basic services  |
| 2. Border closures and controls   | 4. Restriction of economic activity (including shops and shopping centers)                             | <b>Education / schools</b>  |
| 3. Border controls  | 5. Price and quantity controls   | 1. Suspension of classes  |
| 4. Restriction or closure of public places and mass gatherings  | 6. Economic Stimulus (includes aggregate value of fiscal measures and separately of credit guarantees) | 2. Provision of tools for distance learning (online platforms, TV, radio, distance-learning materials)  |
| 5. Other  | 7. Regulation of the personal hygiene and cleaning products market                                     | 3. Maintenance of school feeding programme (indicating under which modalities)  |
| <b>Health</b>   | 8. Debt relief and suspension of credit payments (individuals, microentrepreneurs)                     | <b>Gender</b>   |
| 1. Health emergency   | 9. Other   | 1. Gender-based violence against women  |
| 2. Mandatory coverage   | <b>Labor</b>   | 2. Care economy   |
| 3. Mandatory quarantine for foreign travelers, confirmed or suspected cases                                   | 1. Labor Protection  | 3. Employment and income generation   |
| 4. Mandatory general quarantine   | 2. Elective work leave   | 4. Benefits, transfers and other social protection measures   |
| 5. Type of policy on testing (universal, reduced to certain groups, etc.)                                     | 3. Reduction of working hours  | 5. Women's participation in the digital era   |
| 6. Free test coverage expansion   | 4. Prohibition of dismissal from work  | 6. Other  |
| 7. Hospitals (mechanical ventilators, additional ICU beds, protection equipment, temporary hospitals, others) | 5. Other   |   |

Source: Survey Team



## 14.2 Macroeconomic analysis and selection of priority countries

### 14.2.1 Macroeconomic analysis

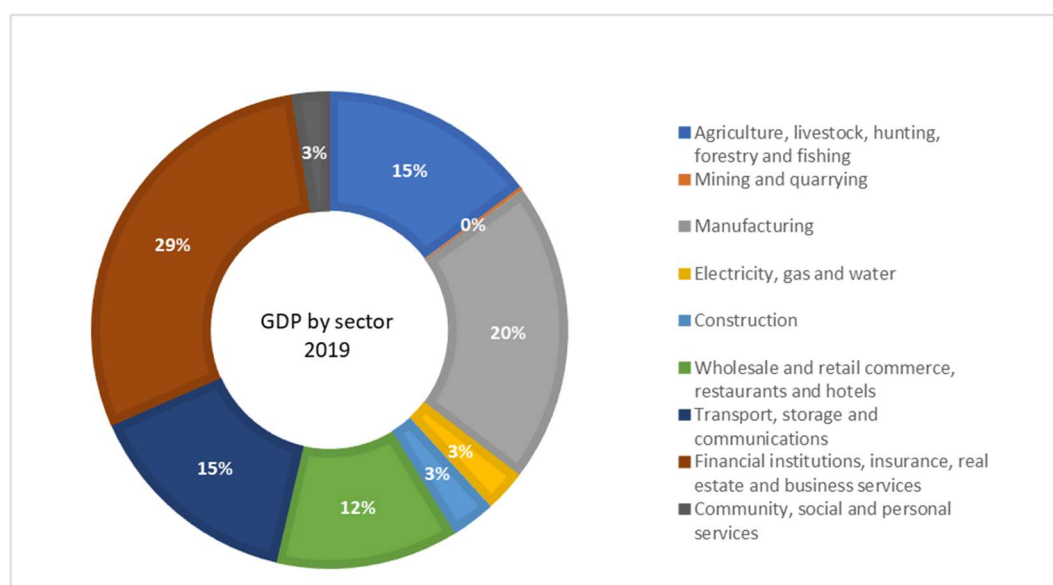
#### (1) Industrial composition

**Table 14-5 Industrial Composition (Honduras)**

Table: Gross domestic product, by sector (En millones de lempiras a precios constantes de 2000)

|  | 2011           | 2012           | 2013           | 2014           | 2015           | 2016           | 2017           | 2018           | 2019a/         | 2020 a/        |
|--|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Agriculture, livestock, hunting, forestry and fishing                | 21,570         | 23,875         | 24,696         | 25,391         | 26,059         | 27,303         | 30,129         | 30,946         | 30,602         | 28,687         |
| Mining and quarrying   | 408            | 395            | 368            | 338            | 334            | 353            | 402            | 429            | 462            | 354            |
| Manufacturing  | 33,033         | 33,628         | 34,762         | 35,816         | 37,230         | 38,340         | 39,843         | 41,372         | 42,231         | 36,303         |
| Electricity, gas and water   | 4,334          | 4,461          | 4,348          | 4,417          | 4,806          | 5,119          | 5,313          | 5,612          | 5,834          | 5,607          |
| Construction   | 5,769          | 5,906          | 5,758          | 5,207          | 5,329          | 5,659          | 6,139          | 6,563          | 6,262          | 4,671          |
| Wholesale and retail commerce, restaurants and hotels                | 20,051         | 20,809         | 21,255         | 21,694         | 22,374         | 23,098         | 23,939         | 24,996         | 25,702         | 21,118         |
| Transport, storage and communications                                | 22,228         | 23,532         | 24,643         | 25,721         | 26,804         | 27,778         | 28,695         | 29,708         | 30,652         | 29,288         |
| Financial institutions, insurance, real estate and business services | 38,561         | 40,539         | 42,218         | 45,082         | 48,652         | 51,107         | 53,593         | 56,319         | 59,979         | 58,724         |
| Community, social and personal services                              | 26,887         | 27,591         | 28,471         | 28,894         | 29,368         | 30,137         | 30,950         | 31,665         | 5,359          | 4,570          |
| <b>Total</b>   | <b>172,842</b> | <b>180,735</b> | <b>186,519</b> | <b>192,560</b> | <b>200,955</b> | <b>208,894</b> | <b>219,003</b> | <b>227,609</b> | <b>207,083</b> | <b>189,321</b> |

Source: ECLAC



Source: Survey Team



## (2) Trends in major economic indicators

**Table 14-6 Trends in Major Economic Indicator (Honduras)**

Table 1 HONDURAS: MAIN ECONOMIC INDICATORS (Annual growth rates)

|  | 2011     | 2012     | 2013     | 2014     | 2015     | 2016     | 2017     | 2018     | 2019a/   | 2020 a/  |
|--|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|
| Gross domestic product (Annual growth rates c/)                                      | 3.8      | 4.1      | 2.8      | 3.1      | 3.8      | 3.9      | 4.8      | 3.7      | 2.7      | -9.0     |
| Per capita gross domestic product (Annual growth rates c/)                           | 1.8      | 2.2      | 0.9      | 1.3      | 2.0      | 2.1      | 3.1      | 2.3      | 2.8      | -6.6     |
| Gross domestic product, by sector (Annual growth rates c/)                           |          |          |          |          |          |          |          |          |          |          |
| Agriculture, livestock, hunting, forestry and fishing                                | 6.5      | 10.7     | 3.4      | 2.8      | 2.6      | 4.8      | 10.3     | 2.7      | -1.0     | -6.3     |
| Mining and quarrying   | -10.6    | -3.2     | -6.8     | -8.3     | -1.0     | 5.4      | 14.1     | 6.7      | 1.9      | -23.5    |
| Manufacturing  | 4.4      | 1.8      | 3.4      | 3.0      | 3.9      | 3.0      | 3.9      | 3.8      | 2.0      | -14.0    |
| Electricity, gas and water   | 3.6      | 2.9      | -2.5     | 1.6      | 8.8      | 6.5      | 3.8      | 5.6      | 2.4      | -3.9     |
| Construction   | 4.4      | 2.4      | -2.5     | -9.6     | 2.3      | 6.2      | 8.5      | 6.9      | 0.3      | -25.4    |
| Wholesale and retail commerce, restaurants and hotels                                | 4.2      | 3.8      | 2.1      | 2.1      | 3.1      | 3.2      | 3.6      | 4.4      | 2.9      | -17.8    |
| Transport, storage and communications  | 6.6      | 5.9      | 4.7      | 4.4      | 4.2      | 3.6      | 3.3      | 3.5      | 3.1      | -4.5     |
| Financial institutions, insurance, real estate and business services                 | 6.2      | 5.1      | 4.1      | 6.8      | 7.9      | 5.0      | 4.9      | 5.1      | 7.0      | -2.1     |
| Community, social and personal services  | 0.6      | 2.6      | 3.2      | 1.5      | 1.6      | 2.6      | 2.7      | 2.3      | 5.4      | -14.7    |
| Balance of Payments (Millions of dollars)  |          |          |          |          |          |          |          |          |          |          |
| Current account balance  | -1,408.7 | -1,580.8 | -1,762.6 | -1,372.1 | -979.9   | -682.6   | -288.2   | -1,416.4 |          |          |
| Goods balance  | -3,149.0 | -3,011.8 | -3,147.1 | -2,967.7 | -2,949.2 | -2,599.3 | -2,753.1 | -3,652.5 | -3,360.8 | -2,557.9 |
| Exports, f.o.b.  | 7,977.0  | 8,359.3  | 7,805.4  | 8,117.1  | 8,225.9  | 7,959.5  | 8,655.8  | 8,587.5  | 8,787.8  | 7,683.4  |
| Imports, f.o.b.  | 11,126.1 | 11,371.1 | 10,952.6 | 11,084.7 | 11,175.3 | 10,558.9 | 11,408.8 | 12,240.1 | 12,148.6 | 10,241.3 |
| Services trade balance   | -423.4   | -591.2   | -667.7   | -436.6   | -444.9   | -578.2   | -775.2   | -1,062.1 | -1,228.6 | -1,115.2 |
| Income balance   | -974.0   | -1,265.5 | -1,353.0 | -1,605.9 | -1,426.4 | -1,507.6 | -1,405.6 | -1,881.5 | -1,901.4 | -1,615.7 |
| Net current transfers  | 3,137.7  | 3,287.7  | 3,405.3  | 3,637.9  | 3,840.5  | 4,002.8  | 4,645.8  | 5,179.7  | 5,894.3  | 5,982.9  |
| Capital and financial balance (Millions of dollars)                                  |          |          |          |          |          |          |          |          |          |          |
| Net foreign direct investment d/   | 1,012.3  | 851.1    | 991.5    | 1,314.9  | 951.6    | 900.1    | 1,035.1  | 895.3    | 499.4    | 371.9    |
| Other capital movements d/   | 476.2    | 438.8    | 1,243.6  | 501.4    | 318.5    | -167.5   | 137.6    | 566.7    | 899.0    | 417.5    |
| Remittances from emigrant workers  | 2,750.0  | 2,842.0  | 3,093.0  | 3,437.0  | 3,727.0  | 3,949.0  | 4,438.0  | 4,884.0  | 177.7    | 183.9    |
| Microfinance dispatched and the sectors that received microfinance for 2019 and 2020 |          |          |          |          |          |          |          |          |          |          |

Source: Economic Survey of Latin America and the Caribbean 2020: Main conditioning factors of fiscal and monetary policies in the post-COVID-19 era

### 14.2.2 Impact analysis and identification of key sectors

#### (1) Impact assessment results for each sector by AHP analytic hierarchy process based on economic indicators

**Table 14-7 Results of Sector Impact Analysis by COVID-19 (Honduras)**

| ECLAC category   | Changes around COVID-19 | Trends before COVID-19 | Total GDP ratio of the sector | comprehensive evaluation |   |
|--|-------------------------|------------------------|-------------------------------|--------------------------|---|
| Importance (weight)  | 0.4590                  | 0.0660                 | 0.0750                        |                          |   |
| Agriculture, livestock, hunting, forestry and fishing                | 1                       | 8                      | 6                             | 0.032                    | 9 |
| Mining and quarrying   | 8                       | 1                      | 1                             | 0.085                    | 3 |
| Manufacturing  | 5                       | 4                      | 8                             | 0.070                    | 4 |
| Electricity, gas and water   | 2                       | 6                      | 3                             | 0.034                    | 8 |
| Construction   | 9                       | 2                      | 4                             | 0.101                    | 1 |
| Wholesale and retail commerce, restaurants and hotels                | 7                       | 5                      | 5                             | 0.087                    | 2 |
| Transport, storage and communications                                | 3                       | 7                      | 7                             | 0.053                    | 7 |
| Financial institutions, insurance, real estate and business services | 4                       | 9                      | 9                             | 0.0690                   | 5 |
| Community, social and personal services                              | 6                       | 3                      | 2                             | 0.0689                   | 6 |

Source: Survey Team

#### 1) ECLAC Sector Classification Amendments to the Sector Classification

In line with the method described in the main volume, the Sector Classification is divided into the Vertical Sector and the Cross-Cutting Sector, the ECLAC classification sector is allocated to the Vertical Sector Classification, and the evaluation of various policies related to COVID-19 taken by the government along with the results of the partner survey and the indicators of the national development

cooperation policy, the ranking of priority sectors are calculated using the four indicators, which are described in the table below.

**Table 14-8 Ranking of Priority Sectors (Honduras)**

|                                   | Economic Indicator Analysis | Government Policy on COVID-19 | Survey on COVID-19 by Development Partners | Country Development Cooperation Policy | Base Case |   | Priority |
|-----------------------------------|-----------------------------|-------------------------------|--|--|-----------|---|----------|
| Importance (weight)               | 0.6000                      | 0.2000                        | 0.1000                                     | 0.1000                                 |           |   |          |
| Social and Economic Policy        | 0.0000                      | 0.0828                        | 0.0091                                     | 0.0125                                 | 0.1043    |   | ○        |
| Health and Nutrition              | 0.0363                      | 0.0517                        | 0.0000                                     | 0.0125                                 | 0.1005    | 4 |          |
| Education                         | 0.0310                      | 0.0034                        | 0.0000                                     | 0.0125                                 | 0.0470    | 6 |          |
| Agriculture and Rural Development | 0.0699                      | 0.0000                        | 0.0000                                     | 0.0125                                 | 0.0824    | 5 |          |
| Manufacturing                     | 0.1583                      | 0.0207                        | 0.0182                                     | 0.0125                                 | 0.2097    | 2 | ○        |
| Environment/ Disaster Management  | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0125                                 | 0.0125    |   | ○        |
| Governance and Security           | 0.0000                      | 0.0276                        | 0.0000                                     | 0.0125                                 | 0.0401    |   | ○        |
| DX Innovation                     | 0.0000                      | 0.0000                        | 0.0273                                     | 0.0000                                 | 0.0273    |   | ○        |
| Infrastructure and Every          | 0.2419                      | 0.0000                        | 0.0182                                     | 0.0000                                 | 0.2601    | 1 | ○        |
| Tourism                           | 0.0626                      | 0.0000                        | 0.0273                                     | 0.0125                                 | 0.1024    | 3 | ○        |
| Public-Private Partnership        | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0000                                 | 0.0000    |   | ○        |

Source: Survey Team

## (2) Sensitivity analysis

### 1) Analysis case settings

Based on the above methodology, the following case settings were made.

**Table 14-9 Sensitivity Analysis Case-based Weighting Settings (Honduras)**

|  | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|--|-----------|------------------------|------------------------|------------------------|
| Economic indicator analysis  | 0.6       | 0.6                    | 0.5                    | 0.5                    |
| Investigation and arrangement of various policies for COVID-19 taken by the government | 0.2       | 0.1                    | 0.1                    | 0.1                    |
| Development partner survey results   | 0.1       | 0.2                    | 0.2                    | 0.3                    |
| Country-specific development cooperation policy  | 0.1       | 0.1                    | 0.2                    | 0.1                    |

Source: Survey Team

### 2) Summary of sensitivity analysis

The results of each sensitivity analysis are as summarized below. Sensitivity analysis did not show much change, which was close to the result of the base case.

**Table 14-10 Summary of Sensitivity Analysis Results (Honduras)**

|                                   | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|-----------------------------------|-----------|------------------------|------------------------|------------------------|
| Social and economic policy        |           |                        |                        |                        |
| Health care / nutrition           | 4         | 5                      | 5                      | 5                      |
| education                         | 6         | 6                      | 6                      | 6                      |
| Agriculture / rural development   | 5         | 4                      | 4                      | 4                      |
| Manufacturing industry            | 2         | 2                      | 2                      | 2                      |
| Environment / disaster prevention |           |                        |                        |                        |
| Governance and citizen security   |           |                        |                        |                        |
| DX / Innovation                   |           |                        |                        |                        |
| Infrastructure and Energy         | 1         | 1                      | 1                      | 1                      |
| sightseeing                       | 3         | 3                      | 3                      | 3                      |
| Public-private partnership        |           |                        |                        |                        |

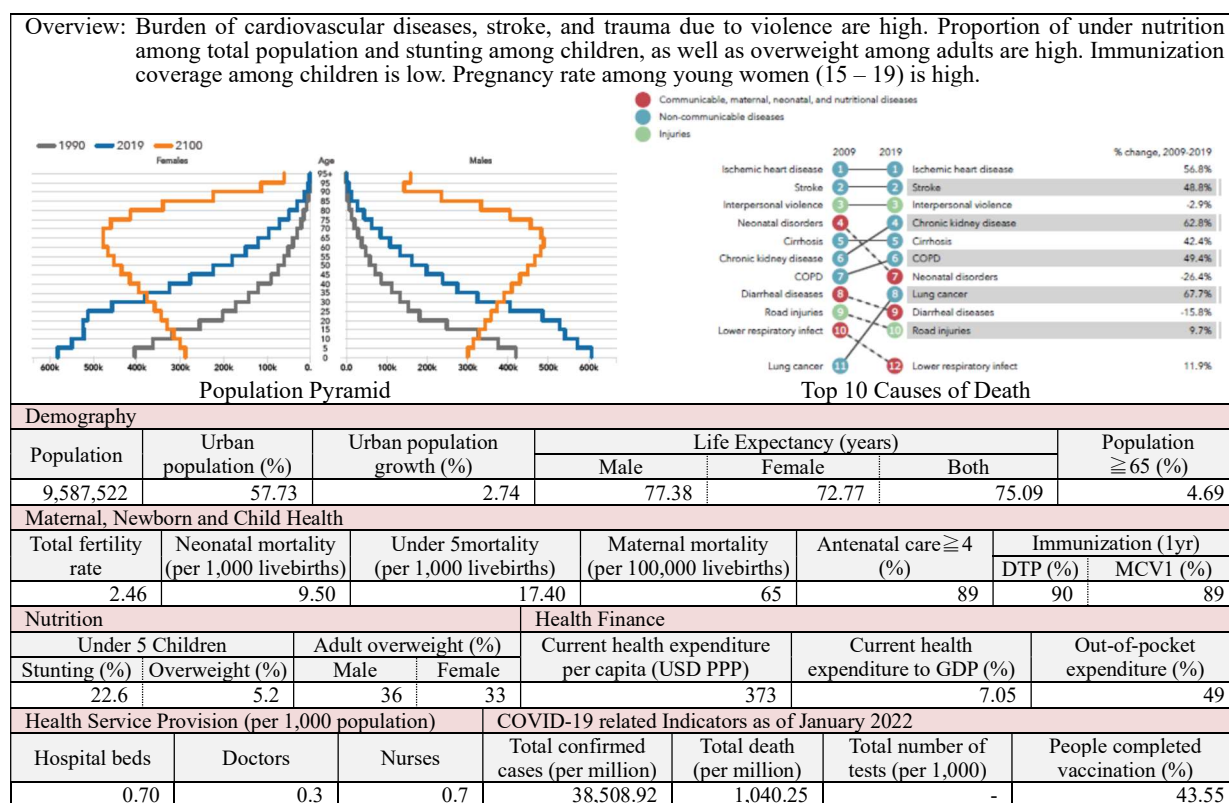
Source: Survey Team

### **(3) Selection of priority sectors by country**

From the above results, 1) social / economic policy, 2) manufacturing industry, 3) environment / disaster prevention, 4) governance / citizen security, 5) DX / innovation, 6) infrastructure / energy, 7) tourism, 8) public-private partnership are selected as priority sectors.

## 14.3 Country-specific information by sector

### 14.3.1 Health care / nutrition



Source: Graphs=Institute for Health Metrics and Evaluation, County Profile; Demography, Total fertility rate, Neonatal mortality, under-5 mortality, Health finance= World Development Indicators, the World Bank (Accessed on Aug 2021); Maternal mortality= UNICEF (Sep 2019); Antenatal care, Immunization, Nutrition, Health service provision,= OECD/The World Bank (2020), Health at a Glance: Latin America and the Caribbean 2020; COVID-19 related indicators= Our World in Data (Accessed on Jan 2022)

| Health                                  |  |
|---|--|
| Leadership/ Governance                  | Responsible Agency: Secretariat of Health<br><a href="http://www.salud.gob.hn/site/">http://www.salud.gob.hn/site/</a><br>Centralized, decentralization is under consideration.<br>Major Relevant Policies: Plan Estrategico Institucional 2018-2022/ Plan Nacional de Salud 2021  |
| Service Providing System                | Public sector is the main provider, but facility and equipment are deteriorated. Public sector covers 75% (Secretariat of Health; 60% and Social Security Institute; 15%), private sector covers 10%. However, 10% of total population does not have access to health services.<br>Integrated health service network (Redes Integradas de Servicios de Salud: RISS) has been integrated to improve efficiency.   |
| Health Finance                          | National health insurance, but low coverage  |
| Human Resource for Health               | Not sufficient to cover the population/ Concentrating to urban areas   |
| IT/ Digital Health                      | Integrated health information system (Sistema Integrado de Información de Salud: SIIS)<br>TeleSAN ( <a href="https://fcm.unah.edu.hn/telesan">https://fcm.unah.edu.hn/telesan</a> , established in 2017) of National Autonomous University of Honduras (UNAH) provides telemedicine in collaboration with the Secretariat of Health and COMSALUD (Cooperativa Mixta de Servicios de Salud) to remote areas. TeleSAN served more than 25,000 people especially children under-five, pregnant women, and diabetes and hypertension patients. |
| Drugs/ Medical Equipment                | Supply is not stable because of high dependency on import. Various efforts have been taken to improve such situation under Master plan to secure medicine and medical supply (Plan Maestro de Aseguramiento de Medicamentos e Insumos de Salud: PMAIS), 2014, but still the supply is not stable.  |
| Priority                                | Health promotion at community level/ Capacity strengthening of local health authority  |
| Communicable Disease Emergency Response | Necessary action and responses are undertaken along with IHR.<br>National influenza center: Laboratorio Nacional de Vigilancia de la Salud - Sección de, Virología, Secretaría de Salud  |
| Major Development Partners              | PAHO/WHO, World Bank, IDB, USAID, Canada, Global Fund  |
| Nutrition                               |  |
| Institutional Arrangement               | National System for Food and Nutrition Security (SINASAN)  |
| Major Relevant Policies                 | Food and Nutrition Security (FNS) Law, 2011  |

|                           |   |
|---------------------------|---|
| Human Resource for Health | Nutrition related degrees: Yes<br>Nutrition related subjects in pre-service education: Yes<br>Number of nutrition related professionals: 0.5 per 100,000 population |
|---------------------------|---|

Source: Survey Team with reference to Institute for Health Metrics and Evaluation, County Profile, JICA, Draft final report of data collection survey on UHC in Latin America and Caribbean Region, 2021 (closed), SUN website, WHO, Global atlas of medical devices, 2017, Telemedicine that improves Honduras' public health system (<https://efectocolibri.com/telesan-telemedicine-that-improves-honduras-public-health-system/>), and WHO, Nutrition Landscape Information System (NLIS)

## 14.3.2 Education

| Overview  |   |  |                |                 |                 |                 |      |                |                  |                |                |
|---|---|--|----------------|-----------------|-----------------|-----------------|------|----------------|------------------|----------------|----------------|
| Number of children  | <table border="1"> <thead> <tr> <th>Education level</th> <th>Preschool</th> <th>primary</th> <th>Lower secondary</th> <th>Upper secondary</th> </tr> </thead> <tbody> <tr> <td>2019</td> <td>235,631 people</td> <td>1,103,956 people</td> <td>449,824 people</td> <td>238,411 people</td> </tr> </tbody> </table>  | Education level  | Preschool      | primary         | Lower secondary | Upper secondary | 2019 | 235,631 people | 1,103,956 people | 449,824 people | 238,411 people |
|   | Education level   | Preschool  | primary        | Lower secondary | Upper secondary |                 |      |                |                  |                |                |
| 2019  | 235,631 people  | 1,103,956 people   | 449,824 people | 238,411 people  |                 |                 |      |                |                  |                |                |
| Source: Institute for Statistics (UIS), UNESCO Bureau of Statistics |   |  |                |                 |                 |                 |      |                |                  |                |                |
| Government authority  | Education Secretariat (Secretaria de Educación)   |  |                |                 |                 |                 |      |                |                  |                |                |
| Education indicator   | Net enrollment rate: primary education 87.5%, lower secondary 62.4%, upper secondary 44.1% (2019)<br>Primary education completion rate 79.5% (2019), out-of-school children rate 12.5% (2019), public education budget GDP ratio 6.1% (2018)  |  |                |                 |                 |                 |      |                |                  |                |                |
| Learning achievement survey   | PISA-D ((PISA for Development) 2016) 7th grade (equivalent to 1st grade of lower secondary school) learning achievement test, reading average 371 points, mathematics average 343 points, science average 370 points, far below the OECD country average (500 points). 70% of students in reading comprehension, 85% in mathematics, and 76% in science have not reached level 2 where they "understand the basics". 3rd Regional Education Quality Survey (TERCE, 2013), 3rd grade science 679.78 (10th out of 15 countries below average), reading comprehension 680.70 points (10th out of 15 countries below average), 6th grade science 661.22 points ( 11th out of 15 countries below average), reading comprehension 662.07 points (13th out of 15 countries below average), science 668.14 points (13th out of 15 countries below average). |  |                |                 |                 |                 |      |                |                  |                |                |
| Impact of COVID-19  |   |  |                |                 |                 |                 |      |                |                  |                |                |
| School closure / reopening  | From March 11, 2020 to February 2, 2021, 147 days of complete closure, 43 days of partial closure, and 190 days in total are the third longest of the 23 Central American Caribbean countries. Classes were held in a remote style from February to October 2021 and in a hybrid style after October.   |  |                |                 |                 |                 |      |                |                  |                |                |
| COVID-19 measures   | -Digital Education Strategy   |  |                |                 |                 |                 |      |                |                  |                |                |
| Distance education  | Implementation status   | Formulated a "digital education strategy" with IDB support. Remote lessons are conducted via online platform, lesson distribution via TV and radio, and video broadcasting via YouTube and WhatsApp. The content and quality of the video are reviewed by the Ministry of Education and delivered after approval. Television program are broadcast twice a day, and radio program are developed according to the schedule set by the Ministry of Education. Also, teaching materials, textbooks and learning guides are delivered in areas where internet access is difficult. The Ministry of Education is considering an internet scholarship system as a "WE WANT YOU to STUDY AT HOME" strategy as a measure against the COVID-19 pandemic. The main means of communication between teachers, students and parents is SNS such as WhatsApp, and home visits are also conducted. About 70% of private schools carry out virtual lessons<br>Distance Education Readiness Index announced by UNICEF is Level 4 "A distance learning system has been established that allows most children and students to continue learning even when schools are closed, and there are areas that need improvement, but there is resilience. " |                |                 |                 |                 |      |                |                  |                |                |
|   | Access  | 40% of homes do not have TV cable, 13% do not have a radio or TV, and only 14% have a computer. According to a survey conducted by the National University of Morasan in April 2020, only 6% used the Internet at home and 12.8% accessed from a personal computer (87.2% accessed from a mobile phone). According to the Census (2017), the internet connection rate at home is 81.3% in urban areas and 18.7% in rural areas. Six out of ten parents say that they are in a "worried" or "desperate" economic situation because they have no work or low income, and four out of ten have less access to the internet. As a result, "many children are left behind in the system," and "the continuation of children's studies is unstable." (Forbes 2020/8/18)<br>Internet access rate for educational purposes in schools: Primary education 16.14% (UNESCO)   |                |                 |                 |                 |      |                |                  |                |                |
|   | Teacher training  | Conducted teacher training by online (audiovisual materials, modules, exercise guides, virtual classes). In a survey conducted by the National University of Morasan in April 2020, about 75% of teachers said that they needed training in managing educational platforms such as Google Classroom, Moodle, and Blackboard. 67% of teachers said that they needed to develop educational videos.  |                |                 |                 |                 |      |                |                  |                |                |

|  |   |  |                             |              |                          |
|--|---|--|-----------------------------|--------------|--------------------------|
| School hygiene   | Infection control measures  | -Developing a strategy to safely return to the classroom |                             |              |                          |
|  | Facility maintenance  | 2019   | Basic water supply facility | Basic toilet | Basic hand-washing place |
|  |   | Primary Education  | 65%                         | ...          | 5%                       |
|  |   | Secondary Education                                      | 52%                         | ...          | 21%                      |
|  |   | Whole country  | 68%                         | 82%          | 12%                      |
|  |   | Rural area   | 74%                         | 23%          | 19%                      |
| Source: World Bank / UNICEF Survey <a href="https://washdata.org/">https://washdata.org/</a> |   |  |                             |              |                          |
| School lunch / nutrition   | Even during school closures, public basic education schools distribute food through teachers in accordance with safety protocols developed by UNICEF and WFP. Under the name of "Operation Honduras Solidaria", food is distributed to vulnerable families under the technical support of the United Nations Development Program (UNDP).  |  |                             |              |                          |
| Countermeasures for vulnerable people  | The Ministry of Education has started a virtual diploma course "Trainer of Multicultural Techniques and Methodology for Intercultural Bilingual Education" for indigenous teachers. In addition, a workshop for teachers on basic guidelines for inclusive education was held.  |  |                             |              |                          |
| Support for donors, etc.   | UNICEF: Advocacy, School Rehabilitation, School Hygiene Equipment, Mental and Emotional Support, School Kits, Protective Hygiene Kits for Vulnerable People<br>IDB: US \$ 150,000 financial support. Technical and operational support for reopening school. (i) Improvement of school environment and development of effective teaching methods, (ii) Social and psychological evaluation and monitoring of children, (iii) Evaluation of working skills and technical preparation support, (iv) COVID- 19 Support for health challenges.<br>USAID: Platform development support for strengthening the education system. As a digital platform for statistical data on education and health, published weekly epidemiological indicators such as the progress and infection status of COVID-19, the number of students in 298 municipalities, the number of teachers, and risk indicators. |  |                             |              |                          |

Source: Survey Team

### 14.3.3 Agriculture / rural development

|   |   |           |           |           |           |           |
|---|---|-----------|-----------|-----------|-----------|-----------|
| Urban / rural population ratio                    | 57.1% / 42.9% (FAOSTAT 2018)  |           |           |           |           |           |
| Agricultural land area                            | 3,511,000 ha (FAOSTAT 2019) 1)  |           |           |           |           |           |
| Agricultural sector employment                    | 29.5% of total employment (male / female ratio: n / d% n / d %) (World Bank 2019) 2)  |           |           |           |           |           |
| Agricultural GDP                                  | 12.1% of total GDP (World Bank 2020)  |           |           |           |           |           |
| Of the agricultural sector Value added amount     | \$ 2,821,386.15 thousand (World Bank 2020) 3) * Statistics include forestry   |           |           |           |           |           |
| Agricultural sector expenditure ratio             | Ratio of agricultural fiscal expenditure to national budget (%) 4)  |           |           |           |           |           |
|   | 2018  | 2019      | 2020      |           |           |           |
|   | 1.84  | 2.71      | 1.79      |           |           |           |
| Agricultural sector import / export balance       | Trade Balance (USD1,000 FAOSTAT) 5)   |           |           |           |           |           |
|   |   | 2015      | 2016      | 2017      | 2018      | 2019      |
|   | export  | 2,107,107 | 2,070,859 | 2,680,054 | 2,358,999 | 2,019,838 |
|   | Import  | 1,511,907 | 1,528,725 | 1,544,641 | 1,722,864 | 1,675,465 |
|   | Balance of payments   | 595,200   | 542,134   | 1,135,413 | 636,135   | 344,373   |
| Agricultural development Policy / plan / strategy | <p>In Honduras, 1.3 million people, or 13.5% of the total population, are malnourished (2018, FAO) 6) With food problems, the agricultural sector plays an important role in reducing food and nutritional insecurity. ing.</p> <p><u>The National Food and Nutrition Security Strategy (ENSAN) 7) is a strategic plan for the period 2010-2022 and is approved within the framework of national policy on long-term food and nutrition security. Its purpose is to ensure the food and nutritional safety of the people of Honduras and to eliminate hunger, food insecurity and malnutrition. One of the strategies focuses on developing the following measures, especially to promote a comprehensive and efficient agriculture and food system.</u></p> <p><u>a) Long-term sustainable integrated development that creates a culture of community participation, empowerment, fairness, social integration, joint responsibility, social vigilance and accountability based on regional and local development plans determined in accordance with the Regional Ordinance</u></p> |           |           |           |           |           |



|                    |  |
|--------------------|--|
|                    | <p><u>Act. Implementation of the model. It also promotes productivity, diversification and added value in the agroforestry sector. b) Improve access to community means of production, including community water retention systems, irrigation, food production, post-harvest, storage, distribution, markets and alternative generation of clean energy, sustainability, efficiency, mimicry, simplicity and innovation. Realize a targeted and low-cost production system, and implement comprehensive training and technology transfer with a particular focus on small-scale farmers. c) Development of alternative credit mechanisms with community or local joint guarantees such as local savings banks, joint banks, contract agriculture, risk capital lenders, agricultural insurance and local banks.</u></p> <p>In addition, ENSAN strives to mitigate the risks of natural disasters, climate change, or catastrophic economic or political crises and ensure that people have access to adequate food at all times in its sixth course of action. It is clearly stated that it will continue. To that end, measures are being considered to reduce environmental fragility and ensure a stable inventory of food and timely distribution to the most vulnerable groups.</p>  |
| Impact of COVID-19 | <p>According to a survey by GAFSP, a financial fund that supports hunger, malnutrition and poverty alleviation in the world's poorest countries (2020) 8), the main problem faced by rural farmers was limited transportation. Was shown. Although farmers are able to carry out production work, they have no choice but to accept low-priced transactions in order to secure sales channels, resulting in losses. For coffee farmers, the pandemic began in the middle of the harvest season, which not only affected the harvesting process itself, but also had the dual effect of making the harvested coffee difficult to sell due to regulations. Some farmers are unable to pay loans or pay workers, which has contributed to financial instability. Exports of fruits such as melons to Europe are also active, but all of them have to be stopped. In addition, the cost of inputting fertilizers and pesticides for pest management has increased, and producers have been hit hard.</p> <p>The government recognizes that the agricultural food production and processing sector is a strategic sector that brings the public interest, and its public policy priorities include inclusiveness (gender and youth, indigenous peoples, fair and balanced regional development). Based on the principles of agility, sustainability and innovation for food security, the Strategy for the Agricultural Food Sector for COVID-19 (2020) 9) was established. It consists of 10 strategic axes and guarantees the continuation of the function of the agricultural supply chain and the agricultural export value chain, including not only the countermeasures for the COVID-19 pandemic disaster but also the subsequent industrial growth.</p> <p>However, sub-sectors such as fishermen have stated that they are "not included in national promotion and emergency policies and feel alienated," suggesting that government support is inadequate. Ten). A network of micro-fishermen consisting of 22 affiliates in Honduras reported that the union lost more than \$ 1.4 million due to a pandemic tourism and supply chain closure (2020, EFE) 10). The suspension of transportation services and the closure of the entire food distribution system affected shipments of more than £ 250,000 (113,600 kg) of salted dried fish and cost more than \$ 17.5 million (\$ 707,000). There is data that the micro-fishing industry supports 24,000 families and employs about 110,000 people, and the small-scale fishing industry produces about 676 million lempira (about \$ 27.3 million) annually 10).</p> |
| Source / reference | <p>1) FAOSTAT-Land, Input and Sustainability-Land Use-Area-Agriculture (<a href="https://www.fao.org/faostat/en/#data/RL">https://www.fao.org/faostat/en/#data/RL</a>)<br/> 2) <a href="https://data.worldbank.org/indicator/SL.AGR.EMPL.ZS?locations=HN&amp;view=chart">https://data.worldbank.org/indicator/SL.AGR.EMPL.ZS?locations=HN&amp;view=chart</a><br/> 3) <a href="https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=HN&amp;view=chart">https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=HN&amp;view=chart</a><br/> 4) FAOSTAT-Government Expenditure-Share of Total Expenditure-Central Government (<a href="https://www.fao.org/faostat/en/#data/IG">https://www.fao.org/faostat/en/#data/IG</a>)<br/> 5) FAOSTAT-Trade-Crops and livestock products-Import / Export Value-Agricultural Products (<a href="https://www.fao.org/faostat/en/#data/TCL">https://www.fao.org/faostat/en/#data/TCL</a>)<br/> 6) <a href="https://www.fao.org/faostat/en/#data/FS">https://www.fao.org/faostat/en/#data/FS</a><br/> 7) Estrategia Nacional de Seguridad Alimentaria y Nutricional 2010-2022 (<a href="http://faolex.fao.org/docs/pdf/hon157498.pdf">http://faolex.fao.org/docs/pdf/hon157498.pdf</a>)<br/> 8) In Honduras, COVID-19 is Taking a Toll on Smallholder Farmers, 2020, GAFSP (<a href="https://www.gafspfund.org/news/honduras-COVID-19-taking-toll-smallholder-farmers">https://www.gafspfund.org/news/honduras-COVID-19-taking-toll-smallholder-farmers</a>)<br/> 9) Estrategia del Sector Agroalimentario frente a la COVID-19, 2020 (<a href="https://utsan.scgg.gob.hn/wp-content/uploads/2021/06/Estrategia-agro-COVID-19_Honduras.pdf">https://utsan.scgg.gob.hn/wp-content/uploads/2021/06/Estrategia-agro-COVID-19_Honduras.pdf</a>)<br/> 10) Pescadores artesanales de Honduras pierden 1,4 millones dolares por COVID-19, 2020, EFE (<a href="https://www.efe.com/efe/america/economia/pescadores-artesanales-de-honduras-pierden-1-4-millones-dolares-por-COVID-19/20000011-4223435">https://www.efe.com/efe/america/economia/pescadores-artesanales-de-honduras-pierden-1-4-millones-dolares-por-COVID-19/20000011-4223435</a>)</p>   |

#### 14.3.4 Private sector

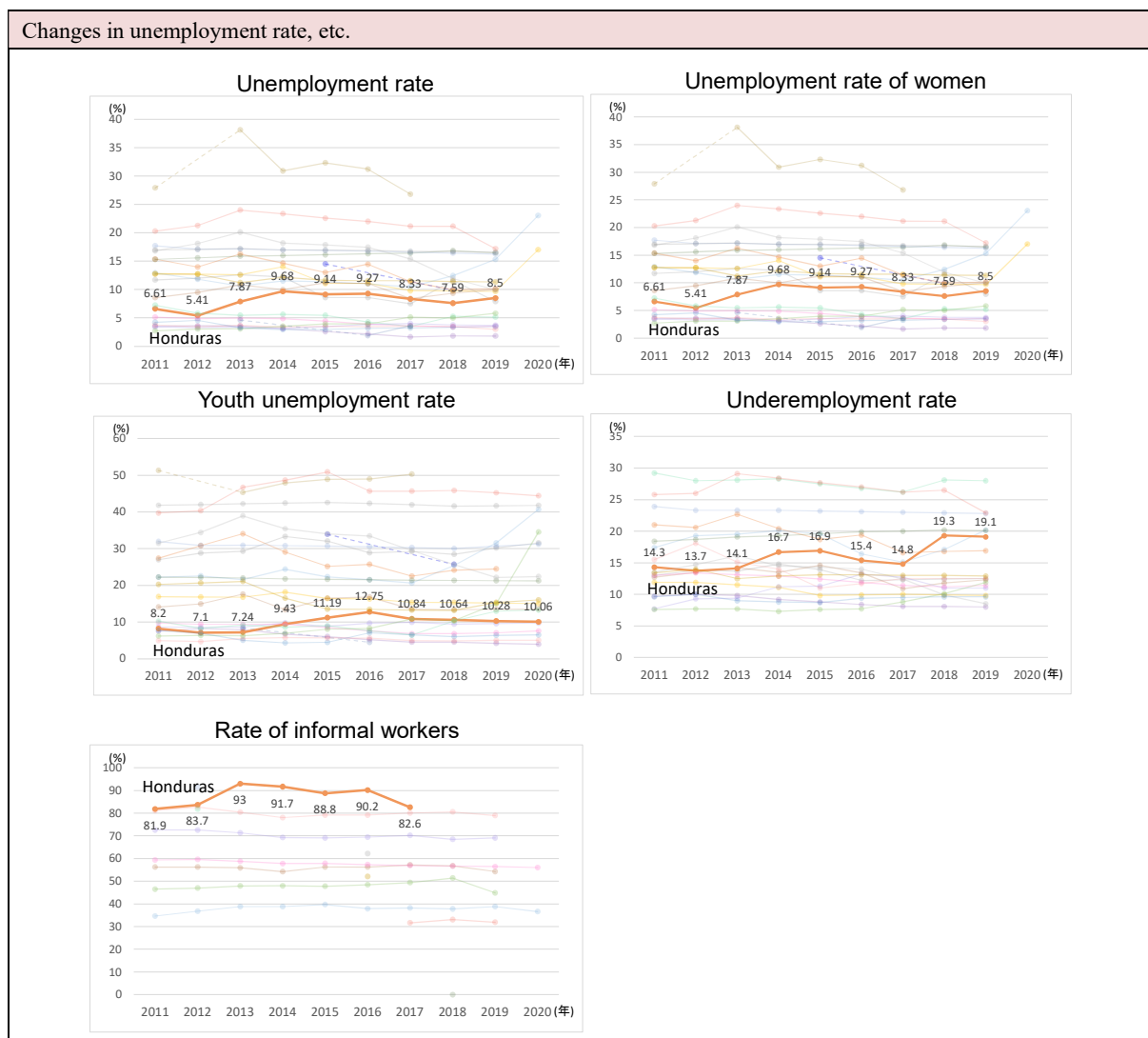
Honduras is a developing country with a relatively large economy (8th), but with 20th GDP per capita out of 22 countries. On the other hand, the minimum wage is high (7th) and the unemployment rate is low. However, the informal worker rate is as high as 82.6%, and the low unemployment rate is thought to be supported by informal employment.

|              | Index                      | Value  | Ranking                 | Year | Source             |
|--------------|----------------------------|--------|-------------------------|------|--------------------|
| Productivity | GDP per capita (USD)       | 2,406  | 20 (Among 22 countries) | 2020 | World Bank         |
|              | GDP per worker (USD)       | 12,794 | 16 (Among 18 countries) | 2019 | World Bank         |
| Employment   | Minimum wage (USD / month) | 353    | 7 (Among 23 countries)  | 2019 | ILO                |
|              | Unemployment rate          | 5.39   | 6 (Among 22 countries)  | 2019 | Statista           |
|              | Female unemployment rate   | 8.5    | 10 (Among 22 countries) | 2019 | The Global Economy |



|  |                         |       |                            |      |          |
|--|-------------------------|-------|----------------------------|------|----------|
|  | Youth unemployment rate | 10.28 | 7 (Among 22 countries)     | 2019 | Statista |
|  | Underemployment rate    | 19.1  | 13 (Among 18 countries)    | 2019 | ILO      |
|  | Informal worker rate    | 82.6  | 11 11 (Among 12 countries) | 2017 | ILO      |

Source: Described in the table



Source: World Bank, ILO, The Global Economy, etc.

### 14.3.5 Environment / disaster prevention

|             | item   | data  | remarks                          |
|-------------|--|---|----------------------------------|
| environment | Environmental agency                                     | MIAMBIENTE  |                                  |
|             | Waste-related organizations                              | Municipalities  |                                  |
|             | Environmental Budget (USD)                               | 2019: 10,519,058<br>2020: 10,043,739<br>2021: 10,039,322<br>Three-year average:<br>10,200,706 | Average: 8th out of 23 countries |
|             | Environmental budget per capita (2019-2021 average, USD) | 1.0 1.0   | 13th out of 23 countries         |
|             | Budget ratio to national budget (2019)                   | 0.10%   | 11th out of 23 countries         |
|             | Donor support status                                     | Ten   | As of May 2021                   |
|             | Renewable energy power generation (GWh) (2019)           | 408   | IRENA, 2021                      |
|             | Geothermal power generation capacity (MWe)               | 2020: 35.00<br>2025 Forecast: 35.00   | WGC, 2020                        |

|                     |  |   |                                   |
|---------------------|--|---|-----------------------------------|
| Disaster prevention | Disaster prevention organization                   | Permanent Contingency Commission (COPECO) |                                   |
|                     | Donor support status                               | 6   | As of May 2021                    |
|                     | Number of natural disasters (2010-2020)            | 15 cases                                  | Major disasters: floods, droughts |
|                     | Number of victims (persons) per 100,000 population | 16,938 people                             | 7th out of 23 countries           |

Source: Survey Team

### 14.3.6 Governance and citizen security

| Item                                    | Overview  |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|---|---|-----------------------------|---------|----------------------------|----------------------------|--------------------------|-----------------------------|------|-----|------|-----|------|-----|----------|------|-----|------|-----|------|-----|---|-----------------------------|------|-----|------|-----|------|-----|----------|------|-----|------|-----|------|-----|--------------------------|-----------------------------|------|-----|------|-----|------|-----|----------|------|-----|------|-----|------|-----|--------------------|-----------------------------|------|-----|------|-----|------|-----|----------|------|-----|------|-----|------|-----|-------------|-----------------------------|------|-----|------|-----|------|-----|----------|------|-----|------|-----|------|-----|-----------------------|-----------------------------|------|-----|------|-----|------|-----|----------|------|-----|------|-----|------|-----|
| Political system                        | Presidential Republic   |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
| Election system                         | Elections are held on a regular basis with constant competition, but the election process lacks transparency.<br>The president is elected by a simple majority vote. The term of office is four years.  |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
| Legislative system                      | Unicameral National Assembly  |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
| Most recent / next legislative election | November 28, 2021   |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
| Appointment of judicial system / judge  | The chief of the court is appointed by mutual election of the judges in the court. Judges are elected by the Nominating Committee from among the candidates nominated by each organization to which the members belong.   |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
| Political stability                     | Low   |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
| "Worldwide Governance Indicators"       | <p>The levels of "government effectiveness," "regulatory quality" and "rule of law" are particularly low. Due to the recently discovered natural resources, anti-corruption reforms are needed.</p> <table border="1"> <caption>Worldwide Governance Indicators Percentile Ranks (Estimated)</caption> <thead> <tr> <th>Indicator</th> <th>Country</th> <th>Year</th> <th>Percentile Rank (0 to 100)</th> </tr> </thead> <tbody> <tr> <td rowspan="6">Voice and Accountability</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~60</td> </tr> <tr> <td>2019</td> <td>~60</td> </tr> <tr> <td>2020</td> <td>~60</td> </tr> <tr> <td rowspan="3">Honduras</td> <td>2010</td> <td>~35</td> </tr> <tr> <td>2019</td> <td>~35</td> </tr> <tr> <td>2020</td> <td>~35</td> </tr> <tr> <td rowspan="6">Political Stability and Absence of Violence/Terrorism</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Honduras</td> <td>2010</td> <td>~25</td> </tr> <tr> <td>2019</td> <td>~25</td> </tr> <tr> <td>2020</td> <td>~25</td> </tr> <tr> <td rowspan="6">Government Effectiveness</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Honduras</td> <td>2010</td> <td>~30</td> </tr> <tr> <td>2019</td> <td>~30</td> </tr> <tr> <td>2020</td> <td>~30</td> </tr> <tr> <td rowspan="6">Regulatory Quality</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Honduras</td> <td>2010</td> <td>~35</td> </tr> <tr> <td>2019</td> <td>~35</td> </tr> <tr> <td>2020</td> <td>~35</td> </tr> <tr> <td rowspan="6">Rule of Law</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Honduras</td> <td>2010</td> <td>~25</td> </tr> <tr> <td>2019</td> <td>~25</td> </tr> <tr> <td>2020</td> <td>~25</td> </tr> <tr> <td rowspan="6">Control of Corruption</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Honduras</td> <td>2010</td> <td>~25</td> </tr> <tr> <td>2019</td> <td>~25</td> </tr> <tr> <td>2020</td> <td>~25</td> </tr> </tbody> </table> | Indicator                   | Country | Year                       | Percentile Rank (0 to 100) | Voice and Accountability | * Latin America & Caribbean | 2010 | ~60 | 2019 | ~60 | 2020 | ~60 | Honduras | 2010 | ~35 | 2019 | ~35 | 2020 | ~35 | Political Stability and Absence of Violence/Terrorism | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Honduras | 2010 | ~25 | 2019 | ~25 | 2020 | ~25 | Government Effectiveness | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Honduras | 2010 | ~30 | 2019 | ~30 | 2020 | ~30 | Regulatory Quality | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Honduras | 2010 | ~35 | 2019 | ~35 | 2020 | ~35 | Rule of Law | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Honduras | 2010 | ~25 | 2019 | ~25 | 2020 | ~25 | Control of Corruption | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Honduras | 2010 | ~25 | 2019 | ~25 | 2020 | ~25 |
|   | Indicator   | Country                     | Year    | Percentile Rank (0 to 100) |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   | Voice and Accountability  | * Latin America & Caribbean | 2010    | ~60                        |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   |                             | 2019    | ~60                        |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   |                             | 2020    | ~60                        |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | Honduras                    | 2010    | ~35                        |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   |                             | 2019    | ~35                        |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   |                             | 2020    | ~35                        |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   | Political Stability and Absence of Violence/Terrorism   | * Latin America & Caribbean | 2010    | ~55                        |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   |                             | 2019    | ~55                        |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
| 2020                                    |   |                             | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
| Honduras                                |   | 2010                        | ~25     |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2019                        | ~25     |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2020                        | ~25     |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
| Government Effectiveness                | * Latin America & Caribbean   | 2010                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2019                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2020                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   | Honduras  | 2010                        | ~30     |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2019                        | ~30     |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2020                        | ~30     |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
| Regulatory Quality                      | * Latin America & Caribbean   | 2010                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2019                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2020                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   | Honduras  | 2010                        | ~35     |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2019                        | ~35     |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2020                        | ~35     |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
| Rule of Law                             | * Latin America & Caribbean   | 2010                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2019                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2020                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   | Honduras  | 2010                        | ~25     |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2019                        | ~25     |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2020                        | ~25     |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
| Control of Corruption                   | * Latin America & Caribbean   | 2010                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2019                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2020                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   | Honduras  | 2010                        | ~25     |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2019                        | ~25     |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
|   |   | 2020                        | ~25     |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
| Global freedom status                   | 44/100 points (citizen rights: 19/40 points, political rights: 25/60 points)<br>Classified as "partially free country" (Freedom House 2021)   |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
| Corruption Perception Index (CPI)       | 157/180th place, 24/100 points (Transparency International 2020)  |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
| E-government development index          | It is lower than the average level in the region, especially behind the development of communication infrastructure. Although national IDs have been issued, 16.22% of the people (more than 1.05 million people) have not been granted national IDs, which is the highest among Central American countries.  |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |
| Rule of law                             | According to WGI, the level of "rule of law" is very low. The perpetrators are rarely punished,   |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |          |      |     |      |     |      |     |

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|                  | even though the press, political activists and women are victims of violence.  |
| Citizen security | Although it has decreased every year from 83.8 / 100,000 (UNODC 2021) in 2011, it is still high at 37.6 / 100,000 (Infosegura 2021) in 2020. |

Source: Survey Team

### 14.3.7 DX / Innovation

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|---|--|--|
| <p>Basic indicators and statistics</p>  | <p>E-Government Ranking 1): 138th</p> <p>Mobile connection index 2): 50.2</p> <p>Network Infrastructure Index: 55.9</p> <p>Internet user rate 38.2</p> <p>Mobile connection rate 71.1</p> <p>Fixed broadband rate 4.0</p> <p>Rate of increase in the number of Internet users 10.6 (2021/2020)</p> | <p>Radar chart of e-government ranking</p> |
| <p>Communication network</p>  |  |  |
| <p>The fixed line penetration rate 3) in Honduras is 5.4%, which is significantly lower than the average value of 15% in Latin America and the Caribbean Sea. Cumulative per capita investment in fixed lines for 10 years from 20084) was 224 USD million, a low investment compared to neighboring countries Costa Rica (604 USD million) and Panama (604 USD million). In addition, the country's low investment policy in the telecommunications sector (cumulative public investment per capita 4) 2 USD million) has poor fixed-line infrastructure.</p> <p>The penetration rate of mobile lines5) is 70.3%, which is far below the regional average of 100.4%, but mobile services are actively competitive due to private investment (cumulative private investment per person 4) 398USD million). It is being promoted by consumers. In addition, the number of Internet users will increase by 10.6% from the previous year in 2021, and revenue from the mobile sector is expected to increase in the future.</p> <p>The mobile market is oligopolized by América Móvil (Claro 37.4%) and Millicom (Tigo 62.5%), and the state-owned company Hondutel has a market share of only 0.01% 6). Hondutel had monopolized the market for 30 years from 1976, but could not improve the deficit due to adhesion with the government or the military7), and in 1997, it was privatized following the issuance of the "Telecommunications Framework Law" 8). I made a way. However, the economic impact of Hurricane Mitch in 1998 has disrupted plans for private capitalization.</p> <p>In 2020, the country was planning to implement new spectrum allocations for mobile services and analog blackout lines, but was stopped again due to the COVID-19 pandemic 9).</p> |  |  |
| <p>National Strategy for Digital Transformation</p>   |  |  |
| <p>Digital Agenda 2014-201810) (DA) promotes competitiveness and innovation by using ICT in an effective, large-scale and quality manner to make the economy closer to the people and more competitive with the government. I am aiming to develop it.</p> <p>DA consists of the following four strategic axes. 1) Ensuring fair access and increasing the penetration rate of the Internet and other information technologies, 2) Providing high-quality services and information to the people by utilizing ICT, and the efficiency and effectiveness of the public sector with the participation of the people. • Creation of a new highly transparent administrative model, 3) Promote the incorporation of ICT not only in formal education systems at various levels of the country but also in informal education styles, adapt to the challenges of the knowledge society, and at the global level. Fostering competitive human resources, 4) Creating appropriate and efficient institutional and regulatory groups for the effective promotion and development of ICT</p> <p>The "Online Service Index" (OSI 11), which is one of the indicators of e-government ranking, is an evaluation based on the content, accessibility, transaction capacity, and the level of interaction between citizens and the government of government websites. The 138th place is the third lowest among the 23 countries targeted by the JICA project, and the strategy focused on improving its status is the center.</p>   |  |  |
| <p>Characteristic efforts</p>   |  |  |
| <p>In 2019, with the support of the Inter-American Development Bank (IDB) for a loan of 44.7 USD million, expand the scope and use of connectivity and reduce transaction costs for citizens, businesses and public institutions through the development of e-government. And announced a program to develop the country's digital economy12).</p> <p>The Education Sector Strategic Plan 2018-203013) aims to provide fair and quality education that enables effective participation in the modern economy, with internet access (and equipment to support connectivity) and teacher training. Recognizes the need to expand student digital literacy efforts. The government has doubled its efforts towards digitalization as a COVID-19 measure14), and its educational policy and initiative is a "home-based learning program" aimed at enabling students to study interrupted school lessons at home. Is incorporated. Recorded content is available via radio and websites, primarily using virtual classes and interactive workbooks using mobile devices. Internet use for educational purposes is free in the event of certain emergencies such as COVID-19.</p>  |  |  |
| <p>source</p>   |  |  |
| <p>89. E-Gov-Index: a composite indicator that consists of three indexes (Online Service Index, Telecommunication Infrastructure Index and Human Capital Index), which are equally weighted. It ranges from 0 to 1, with 1 being the most developed.</p> <p>90. Mobile Connectivity Index: an input index developed by GSMA to measure the performance against the four key enablers of mobile internet adoption – infrastructure, affordability, consumer readiness and content. (Https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2016/06/Mobile-Connectivity-Launch-Report.pdf)</p> <p>91. Fixed telephone subscriptions (per 100 people) --Latin America &amp; Caribbean, Honduras</p>  |  |  |

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|      | <a href="https://data.worldbank.org/indicator/IT.MLT.MAIN.P2?locations=ZJ-HN">https://data.worldbank.org/indicator/IT.MLT.MAIN.P2?locations=ZJ-HN</a>  |
| 92.  | Digital Transformation: Infrastructure Sharing in Latin America and the Caribbean<br><a href="https://publications.iadb.org/publications/english/document/Digital-Transformation-Infrastructure-Sharing-in-Latin-America-and-the-Caribbean.pdf">https://publications.iadb.org/publications/english/document/Digital-Transformation-Infrastructure-Sharing-in-Latin-America-and-the-Caribbean.pdf</a> |
| 93.  | Mobile cellular subscriptions (per 100 people)-Latin America & Caribbean, Honduras<br><a href="https://data.worldbank.org/indicator/IT.CEL.SETS.P2?locations=ZJ-HN">https://data.worldbank.org/indicator/IT.CEL.SETS.P2?locations=ZJ-HN</a>  |
| 94.  | Honduras: 1Q-20 Ingresos de telefonía fija, telefonía móvil y TV restringida<br><a href="https://otitelecom.org/documentos-de-inteligencia/estadisticas/oti-honduras-telefonía-tv-restringida/">https://otitelecom.org/documentos-de-inteligencia/estadisticas/oti-honduras-telefonía-tv-restringida/</a>  |
| 95.  | Gobierno de Honduras hundió a Hondutel<br><a href="https://www.ccichonduras.org/website/gobierno-de-honduras-hundi%C3%B3-a-hondutel/">https://www.ccichonduras.org/website/gobierno-de-honduras-hundi%C3%B3-a-hondutel/</a>  |
| 96.  | Decreto: 118-97<br><a href="https://leyes.infile.com/visualizador_demo/index.php?id=11237">https://leyes.infile.com/visualizador_demo/index.php?id=11237</a>   |
| 97.  | Espinoza-Vasquez, Fátima K, Las TIC en Honduras: Un análisis sociotécnico<br><a href="https://www.redalyc.org/journal/152/15262283005/15262283005.pdf">https://www.redalyc.org/journal/152/15262283005/15262283005.pdf</a>   |
| 98.  | Digital Agenda of Honduras 2014-2018<br><a href="https://www.scgg.gob.hn/sites/default/files/2018-10/Agenda%20Digital%20de%20Honduras%202014-2018.pdf">https://www.scgg.gob.hn/sites/default/files/2018-10/Agenda%20Digital%20de%20Honduras%202014-2018.pdf</a>  |
| 99.  | Web Measure<br><a href="https://publicadministration.un.org/egovkb/en-us/About/Overview/-E-Government-Development-Index/Online-Service">https://publicadministration.un.org/egovkb/en-us/About/Overview/-E-Government-Development-Index/Online-Service</a>   |
| 100. | El BID aprueba tres operaciones para Honduras por un total de US \$ 134,7 millones<br><a href="https://www.iadb.org/es/noticias/el-bid-aprueba-tres-operaciones-para-honduras-por-un-total-de-us1347-millones">https://www.iadb.org/es/noticias/el-bid-aprueba-tres-operaciones-para-honduras-por-un-total-de-us1347-millones</a>  |
| 101. | trategic Plan for the Education Sector 2018-030<br><a href="https://cne.presidencia.gob.hn/sites/default/files/PESE%202018-2030%20OFICIAL%20VERSION%20COMPLETA.pdf">https://cne.presidencia.gob.hn/sites/default/files/PESE%202018-2030%20OFICIAL%20VERSION%20COMPLETA.pdf</a>   |
| 102. | Honduras-Opportunity-Brief.pdf<br><a href="https://gigaconnect.org/wp-content/uploads/2021/03/Honduras-Opportunity-Brief.pdf">https://gigaconnect.org/wp-content/uploads/2021/03/Honduras-Opportunity-Brief.pdf</a>  |

### 14.3.8 Infrastructure and Energy

|   |   |
|---|---|
| Transport                                 |   |
| Overview                                  | Inland transportation is mainly by car.<br>The main public transportation is buses and taxis. There are also domestic air routes. There are railroads, but only a small part of the lines in the northern part of the country are in operation. |
| Leadership governance                     | Ministry of Public Works, Transport and Housing (SOPRTRAVI)   |
| Major development partners                | JICA / UNDP / IADB / USAID  |
| Energy and electricity                    |   |
| Overview                                  | 52% of primary energy is oil and coal, and the rest is renewable energy.<br>Renewable energy will account for 52% of the electricity energy mix in 2019, primarily hydro, bio, solar and wind.  |
| Carbon neutral national plan              | National Decarbonization Plan Honduras 2020-2050 (Preparing as of 2020)<br>Goal: Reduce GHG emissions by 16% by 2030 (NDC)  |
| Leadership governance and utility company | Ministry of Natural Resources and Environment (SERNA)<br>National Electricity Enterprise (ENEE)   |
| Major development partners                | JICA / UNDP / IADB / GIZ  |

Source: JICA Study Team with reference to various websites of the government organization and international organization (WB / IEA / IRENA / US DOE).

### 14.3.9 Tourism

The ratio of international travel spending is low, and thereby the impact of COVID-19 on the tourism industry is small.

|   |   |  |
|---|---|--|
| Number of international tourist arrivals (2019) |   | 724 thousand   |
| International Tourism Receipts (2019)           |   | USD 547 million  |
| Tourism Competitiveness Ranking (2019)          |   | 3.5 out of 7 (94 <sup>th</sup> out of 140 countries)<br>Highly rated field: International openness (4.3 out of 7 points, 19 <sup>th</sup> out of 140 countries)<br>Low evaluation field: Safety and security (3.6 out of 7 points, 136 <sup>th</sup> out of 140 countries) |
| Tourism Dependency Index (2019)                 |   | 10.7 (73 <sup>rd</sup> out of 166 countries)   |
| Government of Japan policy                      | Number of JICA projects in the last 10 years          | none   |
|   | References to the Country Assistance Policy           | none   |
|   | Interest in pilot projects                            | N / A  |
| Tourism industry vulnerability                  | Contribution of Travel & Tourism to GDP (2019)        | 11.7% (15 <sup>th</sup> out of 23 countries)   |
|   | Contribution of Travel & Tourism to employment (2019) | 12.2% (14 <sup>th</sup> out of 23 countries)   |
|   | Ratio of international spending (2019)                | 24% (21 <sup>st</sup> out of 23 countries)   |
|   | Top 3 nationalities of visitors (2019)                | USA (42.15%)<br>El Salvador (18.72%)<br>Guatemala (11.53%)   |

|  |  |   |
|--|--|---|
| Importance of tourism  | Ratio of the budget amount of tourism-related ministries to the national budget amount (2019)            | 0.1% (15 <sup>th</sup> out of 16 countries)<br>National budget: HNL 261,678,529,366<br>Budget of tourism-related ministries: HNL 204,305,914                              |
|  | Whether or not it is mentioned as a priority sector in the National Economic and Social Development Plan | Yes<br>Plan name: Plan Estratégico de Gobierno 2018-2022<br>Reference example: 4.1.3.3 Subsector Turismo (p. 54) as one of Crecimiento Económico, Incluyente y Sostenible |
|  | Existence of effective national tourism policies / strategies / plans                                    | Yes (Estrategia Nacional de Desarrollo Sostenible del Sector Turismo en Honduras (ENTS-Honduras))   |
| Impact of COVID-19   | Changes in the contribution of Travel & Tourism to GDP (2019 → 2020)                                     | -48.3% (18 <sup>th</sup> out of 23 countries)   |
|  | Changes in the contribution of Travel & Tourism to employment (2019 → 2020)                              | -24.8% (18 <sup>th</sup> out of 23 countries)   |
| Number of government support measures for the tourism sector |  | 11 (Fiscal policy: 4, monetary policy: 5, public-private partnership: 1, health and safety protocol: 1)   |

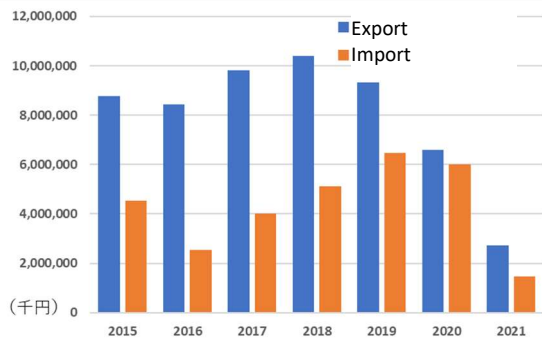
Source: Survey Team

### 14.3.10 Public-private partnership

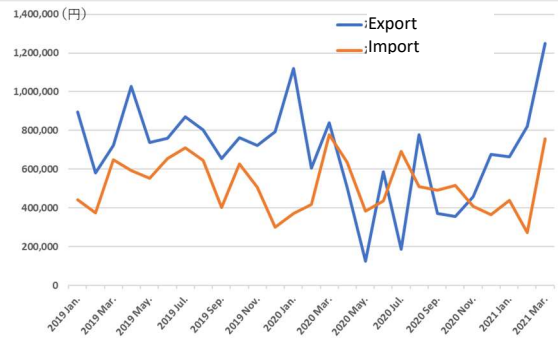
|  | item   | Contents                |
|--|--|-------------------------|
| No. of JICA Public-Private Partnership Projects (After 2012)                 | Cooperation preparatory survey (overseas investment and financing) (former PPP infrastructure project)           | 0 cases                 |
|  | Overseas investment and loan   | 0 cases                 |
|  | SME Partnership Promotion Survey (support for Small-sized Enterprise)  | 1                       |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for small- and medium- sized enterprise) | 0 cases                 |
|  | SDGs Business Verification Survey with Private Sector (support for small- and medium- sized enterprise)          | 0 cases                 |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for large enterprise)                    | 1                       |
| Total number of Japanese private companies entering the market (2019 survey) | SDGs Business Verification Survey with Private Sector (support for large enterprise)                             | 0 cases                 |
|  | Total number of business locations   | 13 companies            |
|  | Overseas branches of Japanese companies,   | 6 companies             |
|  | Local corporations wholly owned by Japanese companies and their branches   | 1 company               |
|  | Branch offices wholly owned by Japanese companies and their branches   | 2 companies             |
|  | joint ventures (local corporations in which Japanese companies have a direct or indirect stake of 10% or more)   | 0 companies             |
|  | joint ventures (Branch offices in which Japanese companies have a direct or indirect stake of 10% or more)       | 1 company               |
|  | companies established overseas by Japanese nationals (in which Japanese nationals have a stake of 10% or more)   | 3 companies             |
| Unknown classification   | 0 companies  |                         |
| Number of Japanese residents (2020 survey)                                   | Total  | 174 people              |
|  | Long-term residents  | 124 people              |
|  | Permanent resident   | 50 people               |
| Business Environment   | Doing Business 2020 Rank   | 130 <sup>th</sup> place |
| PPP Project  | Existence of PPP law scheme  | ○                       |
|  | PPP project with Japanese companies  | 0 cases                 |

Trade trends with Japan

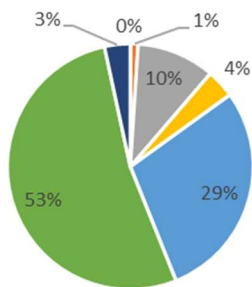
Total import / export (annual transition)  
Blue – Export / Orange - Import



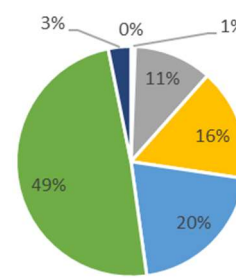
Total import / export (monthly transition)  
Blue – Export / Orange - Import



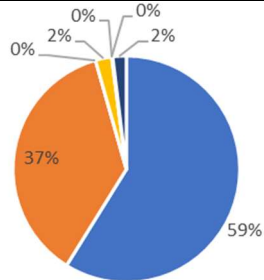
Export items (2019)



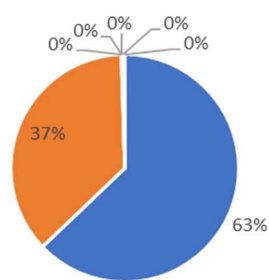
Export items (2020)



Imported items (2019)



Imported items (2020)



- Food
- Raw Materials
- Chemical Products
- Products by Raw Material
- Transportation Equipment
- Machinery/Electronics
- Others

Gathering information about the PPP system

| Nº  | Task Item   | Inquiries/comments/status<br>Title of submitted file   | Source/URL   |
|-----|---|--|--|
| 1   | <b>PRIORITY 4_PPP Sector</b>  |  |  |
| 1.1 | PPP Projects in selective countries<br>PPP rules and regulations in Central America and Caribbean Countries |  | All below can be useful  |
| A   | PPP laws and Regulations<br>if there is any, when, and how  | <p>Promotion Law of the Public Private Alliance</p> <p>Law for the promotion and protection of investments</p> <p>DECREE 127-2013: interpretations art 03, 11, 32</p> <p>LEGISLATIVE DECREEE 284-2013: Reform Art. 29 and 34, Interpretation art. 31, 35</p> <p>General regulation of the law for the promotion of Public-Private Partnerships</p> <p>Regulation for the application of sanctions of the Superintendency of Public Private Partnership (SAPP)</p> <p>Regulations, incorporation and implementation of the data collection system of the Superintendency of Public Private Alliance (SDR SAPP)</p>  | <p><a href="https://sapp.gob.hn/wp-content/uploads/2016/09/leydepromociondelaalanzapublica.pdf">https://sapp.gob.hn/wp-content/uploads/2016/09/leydepromociondelaalanzapublica.pdf</a></p> <p><a href="https://sapp.gob.hn/wp-content/uploads/2016/11/Ley-de-Promocion-y-proteccion-de-la-inversion.pdf">https://sapp.gob.hn/wp-content/uploads/2016/11/Ley-de-Promocion-y-proteccion-de-la-inversion.pdf</a></p> <p><a href="https://sapp.gob.hn/wp-content/uploads/2016/10/Decreto-127-2013.pdf">https://sapp.gob.hn/wp-content/uploads/2016/10/Decreto-127-2013.pdf</a></p> <p><a href="https://sapp.gob.hn/wp-content/uploads/2016/10/Decreto-Legislativo-284-2013-2.pdf">https://sapp.gob.hn/wp-content/uploads/2016/10/Decreto-Legislativo-284-2013-2.pdf</a></p> <p><a href="https://sapp.gob.hn/wp-content/uploads/2016/09/Reglamento-general-de-la-ley-de-promocion-de-la-alianza-publico-privada.pdf">https://sapp.gob.hn/wp-content/uploads/2016/09/Reglamento-general-de-la-ley-de-promocion-de-la-alianza-publico-privada.pdf</a></p> <p><a href="https://sapp.gob.hn/wp-content/uploads/2016/10/reglamento_sancciones_sapp.pdf">https://sapp.gob.hn/wp-content/uploads/2016/10/reglamento_sancciones_sapp.pdf</a></p> <p><a href="https://sapp.gob.hn/wp-content/uploads/2016/10/Normativa-IT-SAPP-19062018v1.pdf">https://sapp.gob.hn/wp-content/uploads/2016/10/Normativa-IT-SAPP-19062018v1.pdf</a></p> |
| B   | PPP Unit Organization<br>if there is any, how structured  | <p>Commission for the promotion of the Public Private Alliance (COALIANZA) as a Decentralized Entity of the Presidency of the Republic, with legal personality and its own patrimony, in charge of managing and promoting the projects and processes of the Public-Private Alliances (APP). For details of functions Art.13 of the Law of promotion of the Public Private Alliance.</p> <p>Pages 6 and 7</p>   | <p><a href="https://sapp.gob.hn/wp-content/uploads/2016/09/leydepromociondelaalanzapublicoprivada.pdf">https://sapp.gob.hn/wp-content/uploads/2016/09/leydepromociondelaalanzapublicoprivada.pdf</a></p>   |
| C   | PPP sectors<br>in what sectors are the PPPs allowed   | <p>In the law, the following sectors are excluded from this Law on promotion and protection of investment:</p> <ol style="list-style-type: none"> <li>1) Disposal and waste of toxic, dangerous or radioactive waste.</li> <li>2) Activities that affect public health.</li> <li>3) Industry and small-scale commerce in accordance with the provisions of art. 337 of the Constitution of the Republic.</li> <li>4) Manufacture, import, distribution and sale of weapons, ammunition and similar items in accordance with the provisions of art. 292 of the Constitution of the Republic.</li> </ol> <p>Regulation of the law - Article 3 - Page 2</p> | <p><a href="https://sapp.gob.hn/wp-content/uploads/2016/11/Ley-de-Promocion-y-proteccion-de-la-inversion.pdf">https://sapp.gob.hn/wp-content/uploads/2016/11/Ley-de-Promocion-y-proteccion-de-la-inversion.pdf</a></p>   |
| D   | Proposal Types (Solicited or Unsolicited)<br>unsolicited  | <p>It is mentioned:</p> <p>State Initiative (article 4 - page 7)</p> <p>Private initiative (Chapter IV - page 12)</p> <p>Law of promotion of the Public Private Alliance.</p>  | <p><a href="https://sapp.gob.hn/wp-content/uploads/2016/09/leydepromociondelaalanzapublicoprivada.pdf">https://sapp.gob.hn/wp-content/uploads/2016/09/leydepromociondelaalanzapublicoprivada.pdf</a></p>   |
| E   | PPP Forms<br>BOT, BTO, DB, , , , what form are allowed  | <p>Any form is allowed</p> <p>See file "210520_PPP Database"</p>   | <p><a href="https://ppi.worldbank.org/en/visualizacion#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CCL&amp;header=true">https://ppi.worldbank.org/en/visualizacion#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CCL&amp;header=true</a></p>   |
| F   | PPP types<br>Availability payment, service purchase   | <p>They can be organized as co-investment (joint venture), legal entities for profit or not for profit, participation contracts, management contracts, trusts or any other form or modality that results from the execution of the works and / or provision of required services .</p> <p>(Articles 5 - Promotion Law of the Public Private Alliance. Page 4)</p>  | <p><a href="https://sapp.gob.hn/wp-content/uploads/2016/09/leydepromociondelaalanzapublicoprivada.pdf">https://sapp.gob.hn/wp-content/uploads/2016/09/leydepromociondelaalanzapublicoprivada.pdf</a></p>   |
| G   | PPP Project Trends<br>how much PPP projects in the last 10 years  | <p>30 (2010 to 2020)</p> <p>See file "210520_PPP Database"</p>   | <p><a href="https://ppi.worldbank.org/en/visualizacion#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CCL&amp;header=true">https://ppi.worldbank.org/en/visualizacion#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CCL&amp;header=true</a></p>   |
| H   | Participation of Japanese firms in PPP Projects<br>if any (check news source)                               | <p>An information search was carried out but no relevant information could be found.</p>   | <p><a href="https://transparencia.se.gob.hn/planeaci%C3%B3n-y-rendici%C3%B3n-de-cuentas/licitaci%C3%B3n-y-compras/licitaciones/">https://transparencia.se.gob.hn/planeaci%C3%B3n-y-rendici%C3%B3n-de-cuentas/licitaci%C3%B3n-y-compras/licitaciones/</a></p>   |
|     | Any notable points for each country<br>if any   | <p>- Pagina oficial APP</p> <p>- Seguimiento Leyes y decretos</p>  | <p>- <a href="https://sapp.gob.hn/">https://sapp.gob.hn/</a></p> <p>- <a href="https://portalunico.iaip.gob.hn/portal/index.php?portal=374">https://portalunico.iaip.gob.hn/portal/index.php?portal=374</a></p>  |

Source: Survey Team



## 15. Jamaica

### 15.1 Country overview (basic information)

#### 15.1.1 Basic information

Jamaica is a constitutional monarchy located in the Greater Antilles of the Caribbean, Central America, a country of the Commonwealth Realm, an island nation, with Cuba and the Cayman Islands to the north and the Cayman Islands to the east. Is located on the island of Hispaniola across the Jamaican Strait. The capital is Kingston. One of the Commonwealth members. The third most English-speaking country in the United States after the United States and Canada. The Commonwealth of Nations was established from 1958 to 1961. It gained autonomy from the United Kingdom in 1959 and became independent as a member of the Commonwealth of Nations in 1962. According to the IMF, Jamaican GDP in 2017 With \$ 14.77 billion and GDP per capita of \$ 5,109, it is classified as a high-middle-income country. The economic growth rate has remained in the 1% range and is expected to continue to increase slightly in the future. According to the OECD, 2009 The unemployment rate is 14.5%, especially for young people under the age of 24, which is the highest level in the world. It can be said that the mining industry supports Jamaican economy, and Bauxite is the fourth largest production volume in the world (13.12 million tons, 2002). Gold and salt are the only mineral resources other than bauxite. As of 2002, 10% of the population is engaged in agriculture. 80% of Blue Mountain, which is famous as a high-class coffee bean, is exported to Japan, but the production of coffee beans is only 3000 tons, which is only 0.04% of the world production. The industry is biased towards the food industry and the textile industry, but the computer processing of data to the light industry and American companies is a growth sector. Tourism is also a major industry, but due to the high number of crimes, the number of resort facilities with walls and fences around them is increasing.

#### 15.1.2 General circumstances

|             |   |                 |  |
|-------------|---|-----------------|--|
| 1 area      | 10,990 square kilometers (almost the same size as Akita Prefecture)         | 2 Population    | 2.948 million people (2019 World Bank)           |
| 3 Capital   | Kingston  | 4 ethnic groups | African 92.1%, mixed race 6.1%, others 1.9%      |
| 5 languages | English (official language), Jamaican Creole (including so-called "Patois") | 6 religion      | Christianity (Protestant, Anglican Church, etc.) |

Source: Ministry of Foreign Affairs HP Jamaica Basic Data

#### 15.1.3 Economic overview

|                          |  |                              |  |
|--------------------------|--|------------------------------|--|
| 1 Major industry         | Tourism, mining (bauxite and alumina), agriculture (sugar, coffee, banana, etc.), manufacturing, construction, finance / insurance   | 2 GNI<br>3 GNI / person      | US \$ 15.81 billion (World Bank 2019)<br>US \$ 10,330 (2019) |
| 4 Economic growth rate   | 0.7% (2019: World Bank)  | 5 Unemployment rate          | 8.0% (2019) (World Bank (Source ILO))                        |
| 6 Price increase rate    | 5.0% (2019) (IMF)  |                              |  |
| 7 Total trade amount     | Exports: US \$ 1.71 billion (2018 WTO)<br>Import: US \$ 6.12 billion (2018 WTO)  |                              |  |
| 8 Major trade items      | Exports: alumina, bauxite, chemicals, sugar, rum, coffee<br>Imports: Fuel, machinery / transportation equipment, food and other consumer goods, construction materials   |                              |  |
| 9 Major trading partners | Exports: USA, EU, Canada, Iceland, Russia (2017, WTO)<br>Imports: USA, EU, Japan, China, Trinidad and Tobago   |                              |  |
| 10 currencies            | Jamaican dollar (J \$)   | 11 Foreign currency reserves | \$ 6,689 million (July 2020.7: Central Bank)                 |
| 12 National budget       | USD5,301,387,755 (2019)  | 13 External debt balance     | \$ 30,702.5 million (2020: Central Bank)                     |
| 14 Economic overview     | In the Jamaican economy, the service industry accounts for more than 70% of GDP. Foreign currency relies heavily on tourism, remittances from foreign migrants, and mining (bauxite, alumina). Due to the global financial crisis and recession, bauxite alumina prices have plummeted and the mining industry's |                              |  |

share has declined. In the tourism industry, which accounts for about 20% of GDP, the number of tourists (about 70% from the United States) has dropped sharply due to the influence of the new coronavirus, which has a great impact on economic trends. Debt balances are still at a high level, and the debt problem remains one of the key issues.

Source: Ministry of Foreign Affairs HP Jamaica Country Basic Data

## 15.1.4 Country-specific development cooperation policy

### (1) Government of Japan Development Cooperation Policy by Country

**Table 15-1 Overview of Japan's ODA to Jamaica**

|   |  |
|---|--|
| <b>1. 1. Overview</b>   |  |
| Japan's economic cooperation with Jamaica began with the acceptance of trainees in 1977, a yen loan in 1981, and the Japan Overseas Cooperation Volunteers (JOCV) dispatch in 1989. In 1995, the Embassy of Japan in Jamaica was opened, and grant-in-aid for grassroots and human security was started. Japan is currently implementing technical cooperation and grant-in-aid for aid that contribute to disaster prevention and environmental efforts and disparity correction.  |  |
| <b>2. 2. Aim of development cooperation</b>   |  |
| There are many island nations in the Caribbean region where the Caribbean community (Calicom) member countries including Jamaica are located, and natural disasters such as hurricanes, earthquakes, and tsunamis occur frequently, and sustainable use of marine biological resources is promoted. It has something in common with Japan in terms of promotion. In addition to being vulnerable to climate change and natural disasters, Calicom member countries are based on industries that have a small population and economy and are susceptible to external factors such as agriculture, fisheries, and tourism. All 14 countries are included in the list of small island developing states published by the United Nations Secretariat. In order to overcome the vulnerabilities peculiar to small island developing states in the Calicom countries, it is necessary to cooperate by utilizing Japan's technology and knowledge in addition to deepening bilateral relations and socio-economics of each country. It is important from the viewpoint of financial stability and sustainable growth of the entire region.                                   |  |
| <b>3. 3. Basic policy</b>   |  |
| In the Development Cooperation Charter, even if the per capita income is at a certain level, for countries with special vulnerabilities such as small island developing states, necessary cooperation will be provided according to the actual development needs and burden capacity of each country. For the Caribbean Community (Calicom) member countries, the first is based on the Japan-Calicom Joint Ministerial Statement adopted at the 4 <sup>th</sup> Japan-Calicom Foreign Ministers' Meeting held in November 2014. In order to "cooperate for sustainable development including overcoming vulnerabilities peculiar to small island developing states", we will develop cooperation that makes use of Japan's technology and knowledge. In accordance with these policies, we will support Jamaica in overcoming the vulnerabilities peculiar to small island developing states by supporting environmentally friendly sustainable social development and disaster prevention efforts. We also reaffirmed that we will cooperate in accordance with this policy at the 5 <sup>th</sup> Japan-Calicom Foreign Ministers' Meeting held in September 2016. |  |
| <b>4. Priority areas</b>  |  |
| (1) Disaster prevention / environment: While strengthening the ability to respond to frequent hurricanes and natural disasters such as floods, small island developing states in the fields of climate change countermeasures, conversion to renewable energy, promotion of energy conservation, waste management, etc. Provide the support necessary to overcome the vulnerabilities peculiar to developing countries. Also pay attention to sharing knowledge with other Calicom member countries.  |  |
| (2) Disparity correction: By strengthening the productivity of small and medium-sized enterprises and supporting the education field, we aim to expand employment opportunities and develop human resources and correct disparities.  |  |

Source: Ministry of Foreign Affairs HP Jamaica Country Data Collection 2017

**Table 15-2 National Development Cooperation Policy for Jamaica (September 2016)**

|   |  |
|---|--|
| <b>3. 3. Priority field (medium goal)</b> |  |
| (1) Disaster prevention / environment     | To reduce greenhouse gases, promote energy conservation and switch to renewable energy, and support waste management for the sustainable development of the urban environment.   |
| (2) Correcting disparities                | By supporting the improvement of productivity of small and medium-sized enterprises and the expansion of vocational training for persons with disabilities, mainly in the field of education, we aim to develop human resources and expand employment opportunities. |

Source: Survey Team

### (2) Survey on COVID-19 by development partners

We extracted sector names and specific quantitative figures that have a large impact on the country-specific analysis described in various reports of development partners. Reports from the World

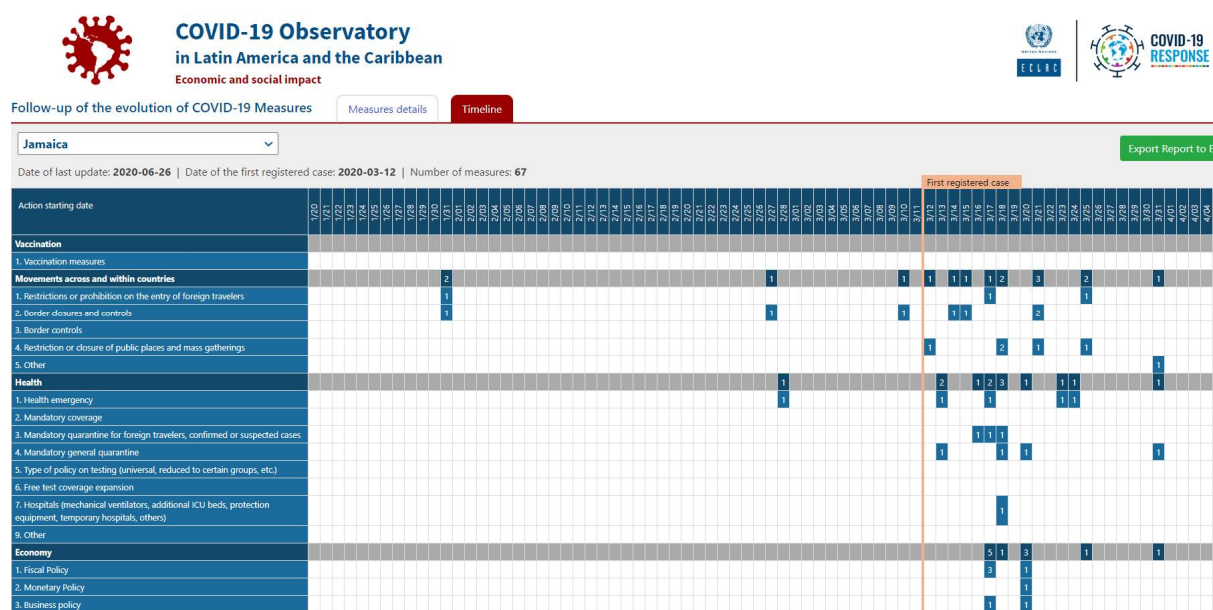
Bank, OECD, BCIE, SICA, and the Ministry of Economy, Trade and Industry of Japan suggest the importance of introducing digitalization and innovation (Fintech, Aggrotech, Autotech, etc.), and incorporate the survey results of these development partners. I arranged it accordingly.

World Bank: “Growth and Revitalization” 2021 Semi-Annual Economic Report (March 2021)

- ✓ OECD: COVID-19 in LAC, Regional socio-economic implications and policy priorities (December 2020)
- ✓ BCIE: Impacto Económico del COVID-19 (April 2020)
- ✓ SICA: Estimación del Impacto Económico del COVID-19 en Centroamérica y República Dominicana (April 2020)
- ✓ Ministry of Economy, Trade and Industry of Japan: “Economic and Industrial Policy Based on the Impact of the New Corona Virus” (June 2020), Accelerating Digitization and Onlineization, Gig Economy, Innovation in the Transition to a New Everyday Life 1) Medical care / health, 2) Digital: Infrastructure development premised on the arrival of a digital society, 3) Green: Response to climate change problems, Energy security, 4) Emphasizes resilience.

### 15.1.5 Policies for COVID-19 measures taken by governments of each country

Various policies for COVID-19 taken by the government are described on the ECLAC homepage “COVID-19 Observatory” by country, time series, and field, and can be analyzed.



Source: <https://cepalstat-prod.cepal.org/forms/covid-countrysheet/index.html?table=2&country=JAM>

In this survey, the 37 policies implemented in Jamaica posted on this website were classified by sector as much as possible.

#### 1) Infection spread and alleviation of aggravation and death

No material was available.

#### 2) Support for affected industries and people

**Table 15-3 Support for Affected Industries and People (Jamaica)**

| Various government policies (COVID-19 Observatory for LAC) |  |    |  |
|--|--|----|--|
| Socioeconomic policy                                       |  | 17 |  |
| Health care & nutrition                                    |  | 8  |  |
| Education  |  | 4  |  |
| Agriculture & rural development                            |  | 0  |  |
| Private sector   |  | 4  |  |
| Environment & disaster prevention                          |  | 0  |  |
| Governance and social security                             |  | 3  |  |
| DX and innovation  |  | 1  |  |
| Infrastructure & energy                                    |  | 0  |  |
| Tourism  |  | 0  |  |
| PPP  |  | 0  |  |
| Others (b)   |  | 0  |  |
| total  |  | 37 |  |

Source: Survey Team

### 3) Arrangement of various policies for COVID-19 taken by the government

COVID-19 Observatory for Latin America and Caribbean (ECLAC) organized by governments

**Table 15-4 Government-directed COVID-19 Policy Categories (Jamaica)**

#### Follow-up of the evolution of COVID-19 Measures

| Vaccination   | Economy  | Social protection   |
|---|--|---|
| 1. Vaccination measures   | 1. Fiscal Policy   | 1. Cash transfers (new transfers, increase in existing transfers, expansion of cash transfers to new recipients, early disbursement of transfers) |
| <b>Movements across and within countries</b>  | 2. Monetary Policy   | 2. Food transfers / In-kind transfers   |
| 1. Restrictions or prohibition on the entry of foreign travelers  | 3. Business policy   | 3. Guarantee of basic services  |
| 2. Border closures and controls   | 4. Restriction of economic activity (including shops and shopping centers)                             | <b>Education / schools</b>  |
| 3. Border controls  | 5. Price and quantity controls   | 1. Suspension of classes  |
| 4. Restriction or closure of public places and mass gatherings  | 6. Economic Stimulus (includes aggregate value of fiscal measures and separately of credit guarantees) | 2. Provision of tools for distance learning (online platforms, TV, radio, distance-learning materials)  |
| 5. Other  | 7. Regulation of the personal hygiene and cleaning products market                                     | 3. Maintenance of school feeding programme (indicating under which modalities)  |
| <b>Health</b>   | 8. Debt relief and suspension of credit payments (individuals, microentrepreneurs)                     | <b>Gender</b>   |
| 1. Health emergency   | 9. Other   | 1. Gender-based violence against women  |
| 2. Mandatory coverage   | <b>Labor</b>   | 2. Care economy   |
| 3. Mandatory quarantine for foreign travelers, confirmed or suspected cases                                   | 1. Labor Protection  | 3. Employment and income generation   |
| 4. Mandatory general quarantine   | 2. Elective work leave   | 4. Benefits, transfers and other social protection measures   |
| 5. Type of policy on testing (universal, reduced to certain groups, etc.)                                     | 3. Reduction of working hours  | 5. Women's participation in the digital era   |
| 6. Free test coverage expansion   | 4. Prohibition of dismissal from work  | 6. Other  |
| 7. Hospitals (mechanical ventilators, additional ICU beds, protection equipment, temporary hospitals, others) | 5. Other   |   |

Source: Survey Team

## 15.2 Macroeconomic analysis and selection of priority countries

### 15.2.1 Macroeconomic analysis

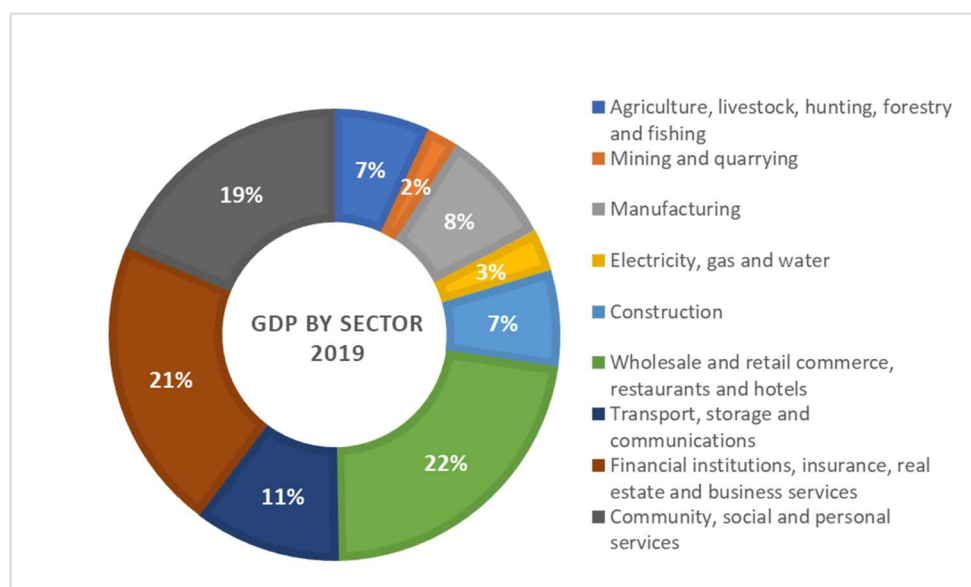
#### (1) Industrial composition

**Table 15-5 Industrial Composition (Jamaica)**

Table: Gross domestic product, by sector (En millones de dólares de Jamaica a precios constantes de 2007)

|  | 2011    | 2012    | 2013    | 2014    | 2015    | 2016    | 2017    | 2018    | 2019a/  | 2020 b/ |
|--|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Agriculture, livestock, hunting, forestry and fishing                | 48,252  | 49,371  | 48,994  | 48,733  | 48,746  | 55,019  | 53,093  | 55,259  | 55,388  |         |
| Mining and quarrying   | 17,823  | 16,273  | 16,716  | 16,861  | 17,022  | 16,456  | 15,786  | 21,118  | 18,686  |         |
| Manufacturing  | 62,694  | 62,590  | 62,326  | 61,854  | 63,088  | 64,312  | 65,564  | 66,144  | 67,075  |         |
| Electricity, gas and water   | 24,227  | 23,705  | 23,242  | 22,973  | 23,293  | 24,123  | 24,323  | 24,278  | 24,522  |         |
| Construction   | 53,609  | 51,252  | 52,208  | 53,084  | 53,845  | 54,057  | 54,599  | 56,390  | 56,094  |         |
| Wholesale and retail commerce, restaurants and hotels                | 171,061 | 169,881 | 170,187 | 171,843 | 173,427 | 174,713 | 177,291 | 179,390 | 182,002 |         |
| Transport, storage and communications                                | 80,464  | 80,422  | 80,774  | 81,416  | 82,221  | 82,827  | 83,671  | 84,814  | 85,490  |         |
| Financial institutions, insurance, real estate and business services | 160,344 | 160,120 | 160,556 | 161,635 | 162,572 | 164,087 | 165,907 | 167,253 | 171,363 |         |
| Community, social and personal services                              | 146,935 | 147,316 | 147,265 | 147,816 | 148,462 | 148,853 | 149,649 | 150,075 | 151,355 |         |
| Total  | 765,409 | 760,930 | 762,268 | 766,215 | 772,676 | 784,447 | 789,883 | 804,721 | 811,975 | 0       |

Source: ECLAC



Source: Survey Team

## (2) Trends in major economic indicators

**Table 15-6 Trends in Major Economic Indicator (Jamaica)**

Table 1 JAMAICA: MAIN ECONOMIC INDICATORS (Annual growth rates)

|  | 2011     | 2012     | 2013     | 2014     | 2015     | 2016     | 2017     | 2018     | 2019a/   | 2020 b/  |
|--|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|
| Gross domestic product (Annual growth rates c/)                                      | 1.7      | -0.6     | 0.5      | 0.7      | 0.9      | 1.4      | 1.0      | 1.9      | 0.9      | -9.0     |
| Per capita gross domestic product (Annual growth rates c/)                           | 1.2      | -1.2     | -0.1     | 0.1      | 0.4      | 0.8      | 0.5      | 1.5      | 0.4      | -9.5     |
| Gross domestic product, by sector (Annual growth rates c/)                           |          |          |          |          |          |          |          |          |          |          |
| Agriculture, livestock, hunting, forestry and fishing                                | 10.3     | 2.3      | -0.8     | -0.5     | 0.0      | 12.9     | -3.5     | 4.1      | 0.2      | 2.4      |
| Mining and quarrying   | 19.1     | -8.7     | 2.7      | 0.9      | 1.0      | -3.3     | -4.1     | 33.8     | -11.5    | -22.5    |
| Manufacturing  | 1.7      | -0.2     | -0.4     | -0.8     | 2.0      | 1.9      | 1.9      | 0.9      | 1.4      | 2.7      |
| Electricity, gas and water   | 0.3      | -2.2     | -2.0     | -1.2     | 1.4      | 3.6      | 0.8      | -0.2     | 1.0      | 1.4      |
| Construction   | 0.8      | -4.4     | 1.9      | 1.7      | 1.4      | 0.4      | 1.0      | 3.3      | -0.5     | -2.4     |
| Wholesale and retail commerce, restaurants and hotels                                | 0.7      | -0.7     | 0.2      | 1.0      | 0.9      | 0.7      | 1.5      | 1.2      | 1.5      | 0.0      |
| Transport, storage and communications  | -1.9     | -0.1     | 0.4      | 0.8      | 1.0      | 0.7      | 1.0      | 1.4      | 0.8      | -0.2     |
| Financial institutions, insurance, real estate and business services                 | -0.2     | -0.1     | 0.3      | 0.7      | 0.6      | 0.9      | 1.1      | 0.8      | 2.5      | 1.7      |
| Community, social and personal services  | 0.5      | 0.3      | -0.0     | 0.4      | 0.4      | 0.3      | 0.5      | 0.3      | 0.9      | 1.6      |
| Balance of Payments (Millions of dollars)  |          |          |          |          |          |          |          |          |          |          |
| Current account balance  | -2,063.2 | -1,440.2 | -1,356.8 | -1,114.4 | -430.1   | -43.5    | -385.6   | -287.6   | -298.1   | -108.0   |
| Goods balance  | -4,215.3 | -3,905.7 | -3,877.7 | -3,759.0 | -3,194.5 | -2,883.7 | -3,553.6 | -3,459.0 | -4,037.9 | -2,924.2 |
| Exports, f.o.b.  | 1,666.1  | 1,728.5  | 1,580.5  | 1,448.6  | 1,254.9  | 1,188.3  | 1,350.8  | 1,978.4  | 1,585.8  | 985.8    |
| Imports, f.o.b.  | -5,881.4 | -5,634.2 | -5,458.2 | -5,207.6 | -4,449.4 | -4,072.0 | -4,904.3 | -5,437.4 | -5,623.7 | 3,910.0  |
| Services trade balance   | 674.2    | 578.3    | 696.6    | 707.5    | 898.1    | 1,045.8  | 1,196.8  | 1,315.3  | 1,706.9  |          |
| Income balance   | -518.4   | -199.6   | -333.6   | -298.4   | -440.0   | -595.0   | -421.1   | -596.0   | -405.6   |          |
| Net current transfers  | 1,996.4  | 2,086.8  | 2,157.9  | 2,235.5  | 2,306.4  | 2,389.4  | 2,392.3  | 2,452.1  | 2,438.5  |          |
| Capital and financial balance (Millions of dollars)                                  |          |          |          |          |          |          |          |          |          |          |
| Net foreign direct investment d/   | 169.5    | 143.7    | 410.5    | 630.6    | 522.7    | 890.8    | 657.9    | 854.5    | 761.9    |          |
| Other capital movements d/   | 1,166.0  | -680.8   | 291.0    | 1,192.4  | -593.6   | -704.2   | 1,141.1  | 364.7    | 397.2    |          |
| Foreign remittance from abroad for 2019 and 2020                                     | 870.8    | 1,326.3  | 400.4    | 859.7    | 1,591.1  | 452.4    | -247.0   | 479.9    | -568.3   |          |
| Remittances from emigrant workers  | 2,018.0  | 2,042.0  | 2,065.0  | 2,157.0  | 2,226.0  | 2,071.0  | 2,157.0  | 2,226.0  | 2,292.0  | 1,555.0  |
| Microfinance dispatched and the sectors that received microfinance for 2019 and 2020 |          |          |          |          |          |          |          |          |          |          |

Source: Economic Survey of Latin America and the Caribbean 2020: Main conditioning factors of fiscal and monetary policies in the post-COVID-19 era

### 15.2.2 Impact analysis and identification of key sectors

#### (1) Impact assessment results for each sector by AHP analytic hierarchy process based on economic indicators

**Table 15-7 Results of Sector Impact Analysis by COVID-19 (Jamaica)**

| ECLAC category   | Changes around COVID-19 | Trends before COVID-19 | Total GDP ratio of the sector | comprehensive evaluation |   |
|--|-------------------------|------------------------|-------------------------------|--------------------------|---|
| Importance (weight)  | 0.4590                  | 0.0660                 | 0.0750                        |                          |   |
| Agriculture, livestock, hunting, forestry and fishing                | 1                       | 8                      | 3                             | 0.027                    | 9 |
| Mining and quarrying   | 9                       | 9                      | 1                             | 0.107                    | 1 |
| Manufacturing  | 2                       | 7                      | 5                             | 0.039                    | 8 |
| Electricity, gas and water   | 4                       | 1                      | 2                             | 0.046                    | 6 |
| Construction   | 8                       | 4                      | 4                             | 0.094                    | 3 |
| Wholesale and retail commerce, restaurants and hotels                | 7                       | 6                      | 9                             | 0.095                    | 2 |
| Transport, storage and communications                                | 6                       | 3                      | 6                             | 0.076                    | 4 |
| Financial institutions, insurance, real estate and business services | 5                       | 5                      | 8                             | 0.072                    | 5 |
| Community, social and personal services                              | 3                       | 2                      | 7                             | 0.045                    | 7 |

Source: Survey Team

#### 1) ECLAC Sector Classification Amendments to the Sector Classification

In line with the method described in the main volume, the Sector Classification is divided into the Vertical Sector and the Cross-Cutting Sector, the ECLAC classification sector is allocated to the Vertical Sector Classification, and the evaluation of various policies related to COVID-19 taken by the government along with the results of the partner survey and the indicators of the national development



cooperation policy, the ranking of priority sectors are calculated using the four indicators, which are described in the table below.

**Table 15-8 Ranking of Priority Sectors (Jamaica)**

|                                   | Economic Indicator Analysis | Government Policy on COVID-19 | Survey on COVID-19 by Development Partners | Country Development Cooperation Policy | Base Case |   | Priority |
|-----------------------------------|-----------------------------|-------------------------------|--|--|-----------|---|----------|
| Importance (weight)               | 0.6000                      | 0.2000                        | 0.1000                                     | 0.1000                                 |           |   |          |
| Social and Economic Policy        | 0.0000                      | 0.0919                        | 0.0000                                     | 0.0000                                 | 0.0919    |   | ○        |
| Health and Nutrition              | 0.0319                      | 0.0432                        | 0.0000                                     | 0.0000                                 | 0.0751    | 4 |          |
| Education                         | 0.0243                      | 0.0216                        | 0.0000                                     | 0.0167                                 | 0.0626    | 6 |          |
| Agriculture and Rural Development | 0.0558                      | 0.0000                        | 0.0125                                     | 0.0000                                 | 0.0683    | 5 |          |
| Manufacturing                     | 0.1349                      | 0.0216                        | 0.0125                                     | 0.0167                                 | 0.1857    | 2 | ○        |
| Environment/ Disaster Management  | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0333                                 | 0.0333    |   | ○        |
| Governance and Security           | 0.0000                      | 0.0162                        | 0.0000                                     | 0.0167                                 | 0.0329    |   | ○        |
| DX Innovation                     | 0.0000                      | 0.0054                        | 0.0375                                     | 0.0000                                 | 0.0429    |   | ○        |
| Infrastructure and Every          | 0.2837                      | 0.0000                        | 0.0125                                     | 0.0167                                 | 0.3129    | 1 | ○        |
| Tourism                           | 0.0695                      | 0.0000                        | 0.0250                                     | 0.0000                                 | 0.0945    | 3 | ○        |
| Public-Private Partnership        | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0000                                 | 0.0000    |   | ○        |

Source: Survey Team

## (2) Sensitivity analysis

### 1) Analysis case settings

Based on the above methodology, the following case settings were made.

**Table 15-9 Sensitivity Analysis Case-based Weighting Settings (Jamaica)**

|  | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|--|-----------|------------------------|------------------------|------------------------|
| Economic indicator analysis  | 0.6       | 0.6                    | 0.5                    | 0.5                    |
| Investigation and arrangement of various policies for COVID-19 taken by the government | 0.2       | 0.1                    | 0.1                    | 0.1                    |
| Development partner survey results   | 0.1       | 0.2                    | 0.2                    | 0.3                    |
| Country-specific development cooperation policy  | 0.1       | 0.1                    | 0.2                    | 0.1                    |

Source: Survey Team

### 2) Summary of sensitivity analysis

The results of each sensitivity analysis are as summarized below. Sensitivity analysis did not show much change, which was close to the result of the base case.



**Table 15-10 Summary of Sensitivity Analysis Results (Jamaica)**

|                                   | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|-----------------------------------|-----------|------------------------|------------------------|------------------------|
| Social and economic policy        |           |                        |                        |                        |
| Health care / nutrition           | 4         | 5                      | 6                      | 6                      |
| education                         | 6         | 6                      | 5                      | 4                      |
| Agriculture / rural development   | 5         | 4                      | 4                      | 5                      |
| Manufacturing industry            | 2         | 2                      | 2                      | 3                      |
| Environment / disaster prevention |           |                        |                        |                        |
| Governance and citizen security   |           |                        |                        |                        |
| DX / Innovation                   |           |                        |                        |                        |
| Infrastructure and Energy         | 1         | 1                      | 1                      | 2                      |
| sightseeing                       | 3         | 3                      | 3                      | 1                      |
| Public-private partnership        |           |                        |                        |                        |

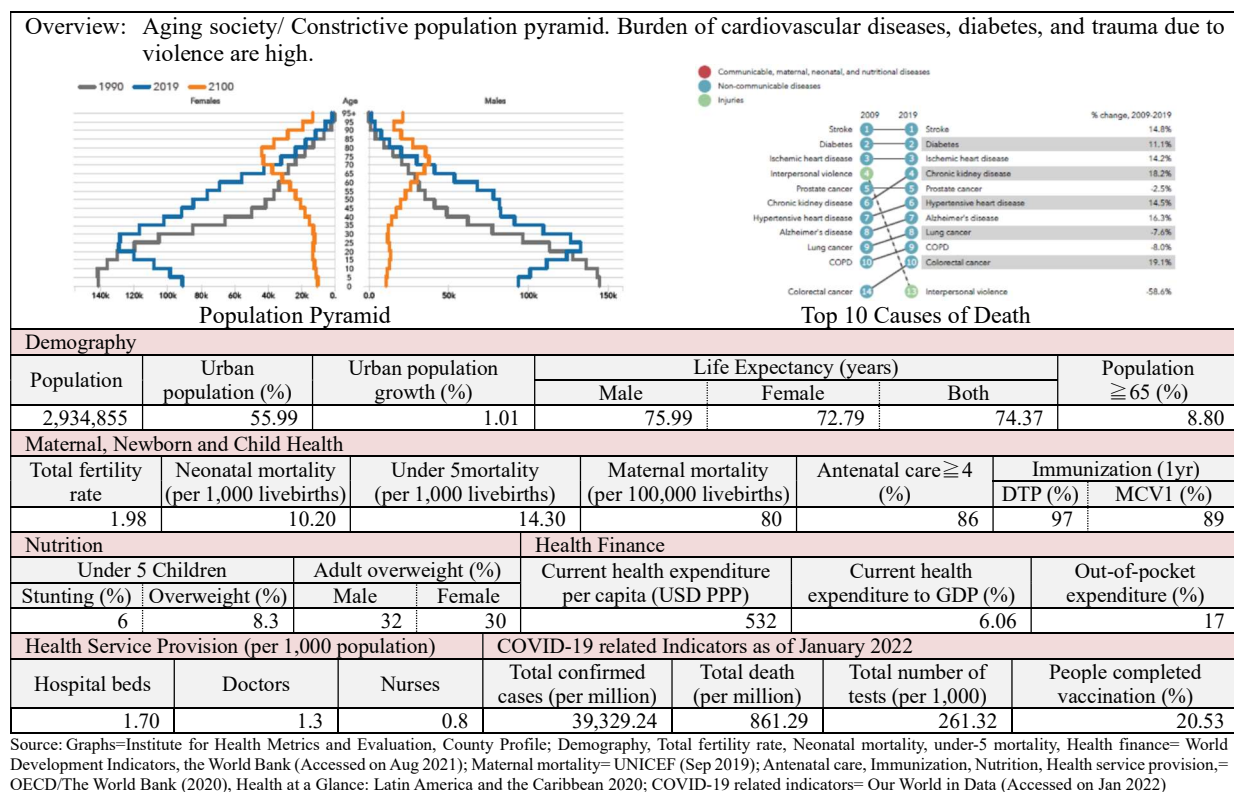
Source: Survey Team

### **(3) Selection of priority sectors by country**

From the above results, 1) social / economic policy, 2) manufacturing industry, 3) environment / disaster prevention, 4) governance / citizen security, 5) DX / innovation, 6) infrastructure / energy, 7) tourism, 8) public-private partnership are selected as priority sectors.

## 15.3 Country-specific information by sector

### 15.3.1 Health care / nutrition



| Health                                  |  |
|---|--|
| Leadership/ Governance                  | Responsible Agency: Ministry of Health and Wellness<br><a href="https://www.moh.gov.jm/">https://www.moh.gov.jm/</a> : Centralized<br>Major Relevant Policies: Health sector plan (Strategic Business Plan) was prepared and implemented along with the National Development Plan Vision 2030 and Medium-Term Socio-Economic Framework 2015-2018   |
| Service Providing System                | Since 2008, citizens have been able to receive services at public facilities free of charge. However, it has been pointed out that this has led to crowded public hospitals, exhausted medical personnel, and a decline in quality. A five-year budget has been set aside for the renovation and expansion of public facilities (including hospitals) starting in 2019.  |
| Health Finance                          | Government fund/ National health expenditure has been increasing due to aging and change of disease burden structure, increasing NCDs.   |
| Human Resource for Health               | Quantity is not sufficient to cover the population. Brain drain is also problem.   |
| IT/ Digital Health                      | National health information and e-health strategic plan (2013-2017)<br>MDLink ( <a href="https://www.themdlink.com/">https://www.themdlink.com/</a> ) established in 2017 to provide telehealth services bridging doctors and patients in the Caribbean region. The services was expanded under COVID-19 situation which include COVID-19 testing and AI screening, online counselling, booking of telephone counselling, etc. |
| Drugs/ Medical Equipment                | The government procure medical equipment. No information on drug and medical supplies.   |
| Priority                                | UHC, health promotion, PHC, health information system and disease surveillance, Malaria, Dengue, and Zika/ Noncommunicable diseases and premature death/ Healthy lifestyle   |
| Communicable Disease Emergency Response | Necessary action and responses are undertaken along with IHR.<br>National influenza center: Virology Laboratory, Department of Microbiology, University of the West Indies, Mona Campus  |
| Major Development Partners              | PAHO/WHO, One UN, EU, IDB, some bilateral donors such as World Bank, Caribbean Development Bank, DFID, USAID/PEPFAR, Canada, China, Mexico, Argentina, Spain, Colombia, Brazil, etc. Planning Institute of Jamaica (PIOJ) coordinates development cooperation in line with the national development plan.  |
| Nutrition                               |  |
| Institutional Arrangement               | Ministry of Agriculture and Fisheries and Ministry of Health   |
| Major Relevant Policies                 | Food and Nutrition Security Policy, 2013   |
| Human Resource for Health               | Nutrition related degrees: Yes<br>Nutrition related subjects in pre-service education: Yes<br>Number of nutrition related professionals: 2.1 per 100,000 population  |

Source: Survey Team with reference to WHO Country Cooperation Strategy for Jamaica at a glance, May 2018, Institute for Health Metrics and Evaluation, County Profile, The Borgen Project, Improving Healthcare in Jamaica, May 2020, PAHO/WHO, Advancing the HRH Plan of Action Objectives in Jamaica, 2019, WHO, Global atlas of medical devices, 2017, and WHO, Nutrition Landscape Information System (NLIS)

## 15.3.2 Education

| Overview   |  |   |                             |                 |                          |
|--|--|---|-----------------------------|-----------------|--------------------------|
| Number of children   | Education level  | Preschool   | primary                     | Lower secondary | Upper secondary          |
|  | 2019   | 108,736 people  | 232,694 people              | 121,435 people  | 81,680 people            |
| Source: Institute for Statistics (UIS), UNESCO Bureau of Statistics                          |  |   |                             |                 |                          |
| Government authority   | Ministry of Education, Youth and Information   |   |                             |                 |                          |
| Education indicator  | Net enrolment rate : 82.1% in lower secondary and 76.4% in upper secondary (2019)<br>Primary education completion rate 84.6% (2019), public education budget 5.2% of GDP (2019)<br>Source: UIS   |   |                             |                 |                          |
| Impact of COVID-19   |  |   |                             |                 |                          |
| School closure / reopening   | From March 11, 2020 to February 2, 2021, 71 days of complete closure and 76 days of partial closure. Remote lessons from February to April 2021, hybrid style of lessons from May to June, extended vacation from July, and remote classes from September.                     |   |                             |                 |                          |
| COVID-19 measures  | N / A  |   |                             |                 |                          |
| Distance education   | Implementation status  | The Ministry of Education, Youth and Information distributes printed materials for students who cannot connect to the Internet, teaches on educational television that can be viewed on 25 cable channels, delivers lessons on 10 radio stations, . Data access such as educational contents and online exams (PEP) from the ministry's website where the workbooks are posted, and school-based initiatives using Google Suite, Schoology, Edmodo, Zoom, Skype, WhatsApp and more.<br>Highest Level 5 of Distance Education Readiness Index published by UNICEF "The country is most prepared for distance learning, but considering factors other than this assessment (actual learning situation, domestic inequality, etc.), the country needs to consider policies to strengthen the overall system. " |                             |                 |                          |
|  | Access   | According to UNICEF, the Internet user rate is 28% of children under the age of 15.<br>Through partnerships with various internet service providers and private companies, students can study online with subsidized data plans and free learning sites. Free SIM card are provided to parents with the support of UNICEF. In collaboration with e-Learning Jamaica, 40,000 tablets in all 6 regions and mobile devices to 25,000 public school teachers are provided. Internet access rate for educational purposes at school: 78.83% for primary school, 46.76% for lower secondary school, 91.15% for upper secondary school (UNESCO)  |                             |                 |                          |
|  | Teacher training   | Approximately 1,000 principals and teachers have been trained in tools and distance communication to improve distance education by launching a Virtual Instructor (VIL) program.  |                             |                 |                          |
| School hygiene   | Infection control measures   | COVID-19 Management task force of education was established, school hygiene guide was created.<br>The decision to reopen school is based on the National Disaster Management Act. It will be a gradual resumption with a flexible school schedule based on social distance measures, hygiene management and public health protocols recommended by the Ministry of Health and WHO. The Ministry of Education carry out an evaluation to grasp the learning situation of the students with the created learning evaluation tool two weeks after the start of the school, and if necessary, retake the grade and make a plan to eliminate learning loss.  |                             |                 |                          |
|  | Facility maintenance   | 2019  | Basic water supply facility | Basic toilet    | Basic hand-washing place |
|  |  | Primary Education   | 94%                         | 94%             | 96%                      |
| Secondary Education  | 96%  | 96%   | 97%                         |                 |                          |
| Source: World Bank / UNICEF Survey <a href="https://washdata.org/">https://washdata.org/</a> |  |   |                             |                 |                          |
| School lunch / nutrition   | The Ministry of Education continued to provide cash benefits for food purchases.   |   |                             |                 |                          |
| Countermeasures for vulnerable people  | Distribution of learning tablets to children with disabilities supported by UNICEF. Providing a connected tablet with learning content to 210 vulnerable children (World Bank)   |   |                             |                 |                          |
| Support for donors, etc.   | UNICEF: Distribution of tablets with school safety protocols and learning applications to the Ministry of Education, Youth and Information for more than 300 children with disabilities. Distribution of 534 tablets and support for 1,100 early childhood education packages. |   |                             |                 |                          |

Source: Survey Team

### 15.3.3 Agriculture / rural development

|   |   |          |          |          |          |           |
|---|---|----------|----------|----------|----------|-----------|
| Urban / rural population ratio                    | 55.7% / 44.3% (FAOSTAT 2018)  |          |          |          |          |           |
| Agricultural land area                            | 444,000 ha (FAOSTAT 2019) 1)  |          |          |          |          |           |
| Agricultural sector employment                    | 15.2% of all employment (male / female ratio: 75.7% / 24.3%) (FAOSTAT 2019) 2)  |          |          |          |          |           |
| Agricultural GDP                                  | 8.7% of total GDP (World Bank 2020)   |          |          |          |          |           |
| Of the agricultural sector Value added amount     | \$ 1,004,304.34 thousand (World Bank 2020) 3) * Statistics include forestry   |          |          |          |          |           |
| Agricultural sector expenditure ratio             | Ratio of agricultural fiscal expenditure to national budget (%) 4)  |          |          |          |          |           |
|   | 2018  | 2019     | 2020     |          |          |           |
|   | 1.86  | 1.66     | 1.70     |          |          |           |
| Agricultural sector import / export balance       | Trade Balance (USD1,000 FAOSTAT) 5)   |          |          |          |          |           |
|   |   | 2015     | 2016     | 2017     | 2018     | 2019      |
|   | export  | 271,372  | 301,226  | 325,110  | 330,357  | 338,998   |
|   | Import  | 860,991  | 846,414  | 902,986  | 959,123  | 1,041,995 |
|   | Balance of payments   | -589,619 | -545,188 | -577,876 | -628,766 | -702,997  |
| Agricultural development Policy / plan / strategy | <p>Investing in this sector is feasible, as Jamaica's agricultural sector is of great economic and social importance, and in recent years the traditional investment sector has been affected by the global recession. Encouraged as an option 6). The government has formulated a strategic business plan 7) of the Ministry of Commerce, Industry, Agriculture and Fisheries with a cross-sectoral approach for the further development of the agricultural sector. This strategic business plan is innovative, comprehensive, sustainable and internationally competitive in the agriculture, fisheries, manufacturing and services sectors for the five years from 2019 to 2023. The goal is to foster a certain Jamaican industry. In addition, food security, health and nutrition issues will be secured through the growth of agriculture, fisheries and food industry. Especially from an environmental point of view, it focuses on developing in a sustainable way, both in policy and legal framework, depending on the protection of agricultural land, animal and plant genetic resources, aquatic ecosystems and fishery resources. We are trying to improve. SMEs also place particular emphasis on youth and female support to increase their contribution to GDP, and relevant businesses and farmers are provided with incentives for funding and other resources. Furthermore, in the agriculture, fisheries, manufacturing and service industries, the industrial growth strategy will be realized by increasing the production of agriculture and fisheries resources including value-added production. In addition, the emphasis is on quality industrial infrastructure, food safety, consumer protection and human health. It aims to strengthen integrated pest management, control the outbreak of animal and plant pests and diseases, and provide consumers with high-quality agricultural products and services.</p> <p>The Caribbean Agricultural Research and Development Institute (CARDI), which is a member of Jamaica, is an organization that conducts research and development aimed at improving the competitiveness and sustainability of the regional agricultural sector, and is a member of the Caribbean Community (CARICOM). Established in 1974 by the national government. Headquartered in Trinidad and Tobago, it is currently based in 14 countries. To transform regional agriculture into a modernized, competitive, innovative and resilient sector, CARDI has developed a five-year roadmap, Strategic Plan 2018-20228). CARDI divides its member countries into three groups in terms of each country's economic structure and strategic approach, and Jamaica belongs to the first group. These countries have the largest land area for agriculture and have considerable capacity for national research and development, so with a large production system using sufficient land resources available, It plays an important role in local food production. CARDI's intervention emphasizes this type of production, and mass-produced commodities promote the agricultural processing sector.</p> |          |          |          |          |           |
| Impact of COVID-19                                | <p>According to a report from the US Department of Foreign Agricultural Services (FAS) (2020) 9), there have been no reports of major food or agricultural shortages in local markets since the start of the March 2020 pandemic. The Jamaican government has announced through the Ministry of Commerce, Industry, Agriculture and Fisheries (MICAFA) that as of April, it has sufficient food in the country for about two to three months. Similarly, he said he had sufficient production materials and agricultural inputs available to continue local production. Some smallholders are financed by local banks to improve productivity, including the introduction of irrigation systems.</p> <p>The abundance of local produce and food is available for consumers, but the original destination for this excess produce is the hotel, restaurant and institution (HRI) sector, which has been restricted by the government as a pandemic measure. It was meant to be sold, and producers were originally expected to make millions of dollars from the HRI sector. To address this situation, the government is providing initiatives (over \$ 16.8 million) to help create alternative markets for agricultural products through MICAFA. The funds are allocated to the establishment of repurchase programs, the</p>   |          |          |          |          |           |

|                    |   |
|--------------------|---|
|                    | strengthening of administrative capacity to promote local agricultural production, and the implementation of educational campaigns aimed at the intake of high value-added agricultural products.   |
| Source / reference | <p>1) FAOSTAT-Land, Input and Sustainability-Land Use-Area-Agriculture (<a href="https://www.fao.org/faostat/en/#data/RL">https://www.fao.org/faostat/en/#data/RL</a>)</p> <p>2) FAOSTAT- Share of employment in agriculture (% of total employment) &amp; Share of female employment in agriculture (% of employment in agriculture) (<a href="https://www.fao.org/faostat/en/#data/OE">https://www.fao.org/faostat/en/#data/OE</a>)</p> <p>3) <a href="https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=JM&amp;view=chart">https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=JM&amp;view=chart</a></p> <p>4) FAOSTAT-Government Expenditure-Share of Total Expenditure-Central Government (<a href="https://www.fao.org/faostat/en/#data/IG">https://www.fao.org/faostat/en/#data/IG</a>)</p> <p>5) FAOSTAT-Trade-Crops and livestock products-Import / Export Value-Agricultural Products (<a href="https://www.fao.org/faostat/en/#data/TCL">https://www.fao.org/faostat/en/#data/TCL</a>)</p> <p>6) Analysis of agricultural policies IN JAMAICA, IDB (<a href="https://publications.iadb.org/publications/312amaica/document/Analysis-of-Agricultural-Policies-in-Jamaica.pdf">https://publications.iadb.org/publications/312amaica/document/Analysis-of-Agricultural-Policies-in-Jamaica.pdf</a>)</p> <p>7) Ministry of Industry, Commerce, Agriculture and Fisheries Strategic Business Plan 2019/2020 – 2022/2023 (<a href="http://faolex.fao.org/docs/pdf/jam185327.pdf">http://faolex.fao.org/docs/pdf/jam185327.pdf</a>)</p> <p>8) CARDI STRATEGIC PLAN 2018-2022 (<a href="http://www.cardi.org/wp-content/uploads/downloads/2018/05/CARDI-Strategic-Plan-2018-to-2022-Final.pdf">http://www.cardi.org/wp-content/uploads/downloads/2018/05/CARDI-Strategic-Plan-2018-to-2022-Final.pdf</a>)</p> <p>9) Impact of COVID-19 on the Jamaican Agriculture Sector, 2020, FAS (<a href="https://www.fas.usda.gov/data/312amaica-impact-COVID-19-jamaican-agriculture-sector">https://www.fas.usda.gov/data/312amaica-impact-COVID-19-jamaican-agriculture-sector</a>)</p> |

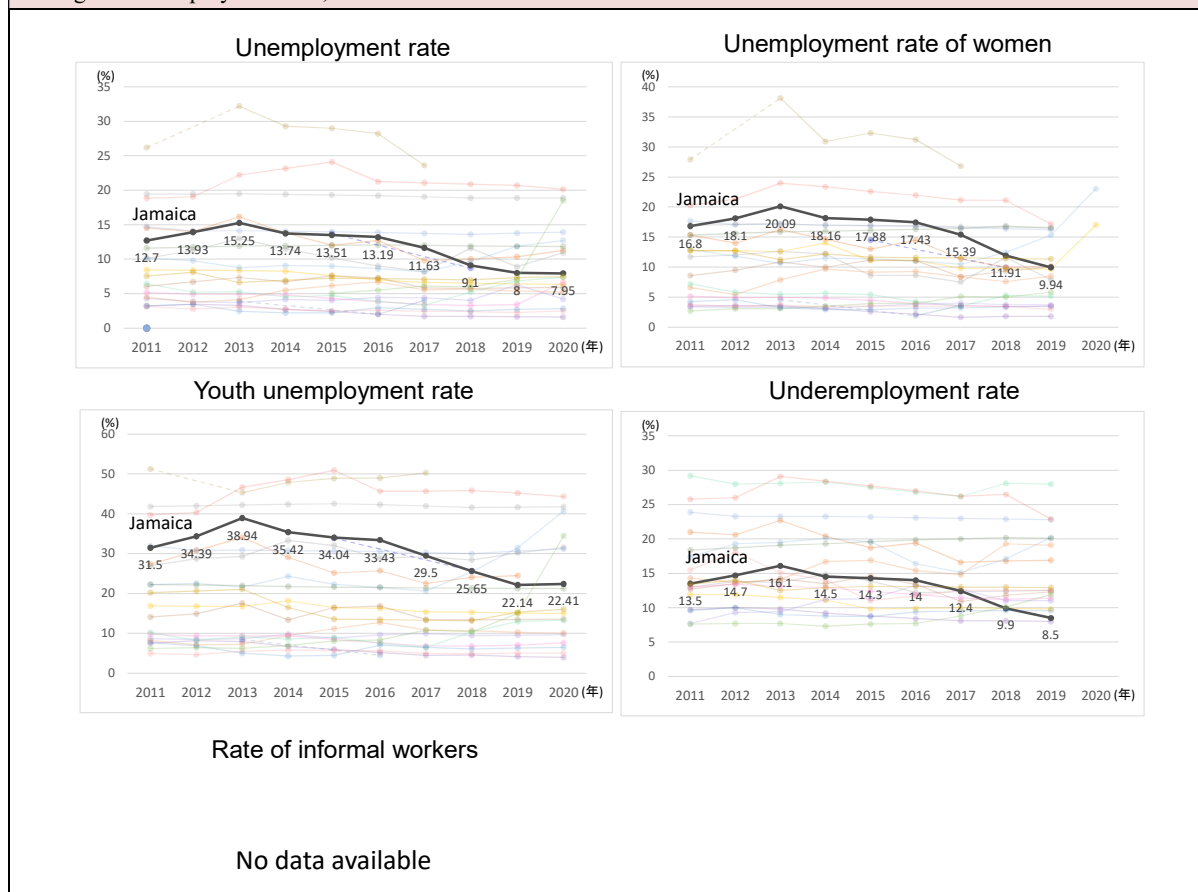
### 15.3.4 Private sector

Jamaica's economy is medium in size in the region. GDP per capita is rather low (16th), while the minimum wage is very low (22nd). The unemployment rate has improved significantly in recent years, with the unemployment rate rising to 15.25% at the peak, but dropping to 8% in 2019. The underemployment rate is particularly low, ranking second among 18 countries.

|              | Index                      | Value  | Ranking                    | Year | Source             |
|--------------|----------------------------|--------|----------------------------|------|--------------------|
| Productivity | GDP per capita (USD)       | 4,665  | 16 16 (Among 22 countries) | 2020 | World Bank         |
|              | GDP per worker (USD)       | 20,779 | 14 (Among 18 countries)    | 2019 | World Bank         |
| Employment   | Minimum wage (USD / month) | 45 45  | 22 (Among 23 countries)    | 2019 | ILO                |
|              | Unemployment rate          | 8      | 13 (Among 22 countries)    | 2019 | Statista           |
|              | Female unemployment rate   | 9.94   | 13 (Among 22 countries)    | 2019 | The Global Economy |
|              | Youth unemployment rate    | 22.14  | 14 (Among 22 countries)    | 2019 | Statista           |
|              | Underemployment rate       | 8.5    | 2 (Among 18 countries)     | 2019 | ILO                |
|              | Informal worker rate       | 8.5    | — (Among 12 countries)     | —    | —                  |

Source: Described in the table

Changes in unemployment rate, etc.



Source: World Bank, ILO, The Global Economy, etc.

### 15.3.5 Environment / disaster prevention

|                     | item   | data   | remarks                                       |
|---------------------|--|--|---|
| environment         | Environmental agency                                     | Ministry of Water Land Environment and Climate Change                      |   |
|                     | Waste-related organizations                              | National Solid Waste Management Authority                                  |   |
|                     | Environmental Budget (USD)                               | 2019: 68,222<br>2020: 49,749<br>2021: 54,602<br>Three-year average: 57,524 | Average: 17 <sup>th</sup> out of 23 countries |
|                     | Environmental budget per capita (2019-2021 average, USD) | 0.02   | 17 <sup>th</sup> out of 23 countries          |
|                     | Budget ratio to national budget (2019)                   | 0.001%   | 13 <sup>th</sup> out of 23 countries          |
|                     | Donor support status                                     | 4 cases  | As of May 2021                                |
|                     | Renewable energy power generation (GWh) (2019)           | 640  | IRENA, 2021                                   |
|                     | Geothermal power generation capacity (Mwe)               | 2020: 0<br>2025 Forecast: 0  | WGC, 2020                                     |
| Disaster prevention | Disaster prevention organization                         | Office of Disaster Preparedness and Emergency Management                   |   |
|                     | Donor support status                                     | 5 cases  | As of May 2021                                |
|                     | Number of natural disasters (2010-2020)                  | 1<br>Major disasters: floods, droughts                                     |   |
|                     | Number of victims (persons) per 100,000 population       | 3,092 people   | 13 <sup>th</sup> out of 23 countries          |

Source: Survey Team

### 15.3.6 Governance and citizen security

| Item  | Overview  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
|---|---|-----------|----------------------------|------|----------------------------|--------------------------|-----------------------------|------|-----|------|-----|------|-----|---------|------|-----|------|-----|------|-----|---|-----------------------------|------|-----|------|-----|------|-----|---------|------|-----|------|-----|------|-----|--------------------------|-----------------------------|------|-----|------|-----|------|-----|---------|------|-----|------|-----|------|-----|--------------------|-----------------------------|------|-----|------|-----|------|-----|---------|------|-----|------|-----|------|-----|-------------|-----------------------------|------|-----|------|-----|------|-----|---------|------|-----|------|-----|------|-----|-----------------------|-----------------------------|------|-----|------|-----|------|-----|---------|------|-----|------|-----|------|-----|
| Political system                                      | Parliamentary democracy under the constitutional monarchy belonging to the Commonwealth of Nations  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
| Election system                                       | Regular and competitive elections are held. The monarch is hereditary. The governor-general is appointed by the monarch at the recommendation of the prime minister.  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
| Legislative system                                    | Bicameral parliament  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
| Most recent / next legislative election               | Senate: September 2020<br>House of Representatives: September 3, 2020 (next time scheduled for 2025)  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
| Appointment of judicial system / judge                | The Chief Justice of the Supreme Court and the Chief of the Court of Appeals are appointed by the Governor based on the advice of the Prime Minister. Other judges in both courts are appointed by the governor-general on the advice of the Judicial Services Commission.  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
| Political stability                                   | Since 2010, the level of stability has improved.  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
| “Worldwide Governance Indicators”                     | <p>Jamaica’s political system is democratic. However, corruption remains a serious problem, and it is believed that there has been a long-standing relationship between government officials and organized criminals (Freedom House 2021). Jamaica’s level of civil liberties is consistently better than the regional average.</p> <table border="1"> <caption>Worldwide Governance Indicators Percentile Rank (0 to 100)</caption> <thead> <tr> <th>Indicator</th> <th>Country</th> <th>Year</th> <th>Percentile Rank (0 to 100)</th> </tr> </thead> <tbody> <tr> <td rowspan="6">Voice and Accountability</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~60</td> </tr> <tr> <td>2019</td> <td>~60</td> </tr> <tr> <td>2020</td> <td>~60</td> </tr> <tr> <td rowspan="3">Jamaica</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~65</td> </tr> <tr> <td>2020</td> <td>~65</td> </tr> <tr> <td rowspan="6">Political Stability and Absence of Violence/Terrorism</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Jamaica</td> <td>2010</td> <td>~35</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="6">Government Effectiveness</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Jamaica</td> <td>2010</td> <td>~45</td> </tr> <tr> <td>2019</td> <td>~65</td> </tr> <tr> <td>2020</td> <td>~65</td> </tr> <tr> <td rowspan="6">Regulatory Quality</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Jamaica</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~65</td> </tr> <tr> <td>2020</td> <td>~65</td> </tr> <tr> <td rowspan="6">Rule of Law</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Jamaica</td> <td>2010</td> <td>~45</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="6">Control of Corruption</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Jamaica</td> <td>2010</td> <td>~45</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> </tbody> </table> | Indicator | Country                    | Year | Percentile Rank (0 to 100) | Voice and Accountability | * Latin America & Caribbean | 2010 | ~60 | 2019 | ~60 | 2020 | ~60 | Jamaica | 2010 | ~55 | 2019 | ~65 | 2020 | ~65 | Political Stability and Absence of Violence/Terrorism | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Jamaica | 2010 | ~35 | 2019 | ~55 | 2020 | ~55 | Government Effectiveness | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Jamaica | 2010 | ~45 | 2019 | ~65 | 2020 | ~65 | Regulatory Quality | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Jamaica | 2010 | ~55 | 2019 | ~65 | 2020 | ~65 | Rule of Law | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Jamaica | 2010 | ~45 | 2019 | ~55 | 2020 | ~55 | Control of Corruption | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Jamaica | 2010 | ~45 | 2019 | ~55 | 2020 | ~55 |
| Indicator   | Country   | Year      | Percentile Rank (0 to 100) |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
| Voice and Accountability                              | * Latin America & Caribbean   | 2010      | ~60                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
|   |   | 2019      | ~60                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
|   |   | 2020      | ~60                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
|   | Jamaica   | 2010      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
|   |   | 2019      | ~65                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
|   |   | 2020      | ~65                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
| Political Stability and Absence of Violence/Terrorism | * Latin America & Caribbean   | 2010      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
|   |   | 2019      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
|   |   | 2020      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
|   | Jamaica   | 2010      | ~35                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
|   |   | 2019      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
|   |   | 2020      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
| Government Effectiveness                              | * Latin America & Caribbean   | 2010      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
|   |   | 2019      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
|   |   | 2020      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
|   | Jamaica   | 2010      | ~45                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
|   |   | 2019      | ~65                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
|   |   | 2020      | ~65                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
| Regulatory Quality                                    | * Latin America & Caribbean   | 2010      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
|   |   | 2019      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
|   |   | 2020      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
|   | Jamaica   | 2010      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
|   |   | 2019      | ~65                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
|   |   | 2020      | ~65                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
| Rule of Law   | * Latin America & Caribbean   | 2010      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
|   |   | 2019      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
|   |   | 2020      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
|   | Jamaica   | 2010      | ~45                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
|   |   | 2019      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
|   |   | 2020      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
| Control of Corruption                                 | * Latin America & Caribbean   | 2010      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
|   |   | 2019      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
|   |   | 2020      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
|   | Jamaica   | 2010      | ~45                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
|   |   | 2019      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
|   |   | 2020      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
| Global freedom status                                 | 80/100 points (citizen rights: 34/40 points, political rights: 46/60 points) Classified as “free country” (Freedom House 2021)  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
| Corruption Perception Index (CPI)                     | 69/180 <sup>th</sup> place, 44/100 points (Transparency International 2020)   |           |                            |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
| E-government development index                        | It is lower than the average level in the region, especially behind the development of online service indicators and communication infrastructure. In terms of human capital, it is higher than the Latin American regional average. A digital national ID issued. The government has made digitalization of administrative procedures one of its main national strategies.   |           |                            |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
| Rule of law   | According to WGI, the level of “rule of law” is low.  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |
| Citizen security                                      | The homicide rate is the highest in the Caribbean. The homicide rate in 2017 was 56.4 / 100,000 (14 in the Caribbean and 6 in the world in the same year) (UNODC 2021). The worst murder rate in Latin America and the Caribbean was recorded in 2020, and the number of murders increased sharply in 2021, with an average of more than 100 murders per month. Poverty, drug trafficking, gangsters, arms smuggling from Haiti, and structural vulnerabilities in police are the main causes of security problems in Jamaica.  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |         |      |     |      |     |      |     |

Source: Survey Team



### 15.3.7 DX / Innovation

|  |   |  |
|--|---|--|
| <p>Basic indicators and statistics</p>   | <p>E-Government Ranking 1): 114<sup>th</sup><br/>         Mobile connection index 2): 59.2<br/>         Network Infrastructure Index: 58.2<br/>         Internet user rate 55.1<br/>         Mobile connection rate 104.3<br/>         Fixed broadband rate 10.8<br/>         Increase rate of Internet users 0.4 (2021/2020)</p> | <p>Radar chart of e-government ranking</p> <p>The radar chart compares Jamaica's performance against Central America and the Caribbean region across three indicators: Online Service Index (OSI), Telecommunication Infrastructure Index (TII), and Human Capital Index (HCI). Jamaica's scores are 0.3882 for OSI, -0.5151 for TII, and 0.7142 for HCI. The chart shows that Jamaica's performance is generally lower than the regional averages in OSI and TII but higher in HCI.</p> |
| <p>Communication network</p>   |   |  |
| <p>The Jamaican telecommunications sector had been exclusively serviced by British C &amp; W until 1999, but since the market liberalization it has brought a large amount of capital investment to the sector and was collected from April 2000 to the end of March 2007. The estimated spectrum charge was 4.74 billion dollars 3). Due to this liberalization, the usage rate of fixed-line phones will decrease from 18.5% (1999) 4) to 8.7% (2014) 4), while the mobile phone purchaser rate will decrease from 5.5% (1999) 5) to 104.5% (2014) 5), and the mobile sector is becoming more important in the telecommunications sector for economic development. In 2012, Claro's Jamaica business merged with Digicel6), strengthening Digicel's market position. Digicel and its only rival, Flow (formerly LIME-C &amp; W, now the brand name of the acquired Liberty Global), have both expanded their LTE networks to handle the surge in data traffic caused by the pandemic. ...</p> <p>In December 2020, the government announced that it would deploy a national broadband network of up to \$ 237 million 7). The use of the funds will be spent on improving connectivity in poorly serviced areas, improving access to education, and developing networks in public places such as hospitals, local governments and police stations.</p> <p>It is also promoting the use of digital channels as one of the COVID-19 pandemic countermeasures, and financial companies such as Scotia Bank are providing zero-rate data access for mobile banking applications used by customers8). Digicel Jamaica, on the other hand, is helping educational platforms and websites with data plans and zero-rate data access 8).</p>   |   |  |
| <p>National Strategy for Digital Transformation</p>  |   |  |
| <p>The ICT Sector Plan 20309) is an ICT strategic plan aimed at building on the basis of existing policies and development frameworks within the sector while ensuring compatibility and consistency with the National Development Plan 203010). It consists of the following eight aspects of the approach.</p> <p>1) e-inclusion, 2) education and training, 3) network readiness and infrastructure development, 4) e-business and industrial structure, 5) e-government, 6) cultural content and creativity, 7) research and innovation, 8) Policy and legal framework</p> <p>Through the ICT Development Initiative (ICT4D) 11), we are implementing initiatives that integrate the education, medical, security, agriculture, tourism, and labor sectors with the ICT sector to promote the development of each sector. In addition, the loan business from the Inter-American Development Bank Group (IDB) 12) aims to strengthen the foundation for building a digital society. The objectives are), 2) implementation of the National Identity Identification System (NIDS) for economic growth activities, and 3) support for public sector transformation programs.</p>   |   |  |
| <p>Characteristic efforts</p>  |   |  |
| <p>From the very beginning of the establishment of the Jamaica MTF13) (medium-term socio-economic framework), the diaspora (foreign immigrants) has been recognized as one of the country's major assets and one of the strategic areas in the process of implementing the national development plan. As a result, it has strengthened its overseas immigration policy14). Plans are also included to introduce ICT technology and establish a monitoring and evaluation reporting system to timely display policy outcomes and warnings / risks in order to keep track of the progress of this immigration policy implementation.</p> <p>It is estimated that a significant portion of Jamaica's foreign exchange revenues are contributed by migrants, receiving US \$ 2.2 billion annually, which is 16% of GDP15). WorldRemit16) (100 enabling international payments from more than 50 countries, as the protracted impact of COVID-19 is expected to make it more difficult to receive cash via remittance platforms and agent networks. % Digital platform) is expected to improve the situation by expanding services through platforms such as.</p>   |   |  |
| <p>Source</p>  |   |  |
| <p>103. E-Gov-Index: a composite indicator that consists of three indexes (Online Service Index, Telecommunication Infrastructure Index and Human Capital Index), which are equally weighted. It ranges from 0 to 1, with 1 being the most developed.</p> <p>104. Mobile Connectivity Index: an input index developed by GSMA to measure the performance against the four key enablers of mobile internet adoption – infrastructure, affordability, consumer readiness and content. (<a href="https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2016/06/Mobile-Connectivity-Launch-Report.pdf">https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2016/06/Mobile-Connectivity-Launch-Report.pdf</a>)</p> <p>105. Association for Information Systems, <i>Telecommunications in Jamaica: Monopoly to Liberalized Competition to Monopoly (2000-2011)</i> <a href="https://core.ac.uk/download/pdf/301361596.pdf">https://core.ac.uk/download/pdf/301361596.pdf</a></p> <p>106. Fixed telephone subscriptions (per 100 people) -Jamaica <a href="https://data.worldbank.org/indicator/IT.MLT.MAIN.P2?locations=JM">https://data.worldbank.org/indicator/IT.MLT.MAIN.P2?locations=JM</a></p> <p>107. Mobile cellular subscriptions (per 100 people) – Jamaica <a href="https://data.worldbank.org/indicator/IT.CEL.SETS.P2?locations=JM">https://data.worldbank.org/indicator/IT.CEL.SETS.P2?locations=JM</a></p> <p>108. David Miller, The Merger of Digicel &amp; Claro is likely to hurt Mobile Phone Customers <a href="http://iftc.gov.jm/wp-content/uploads/2017/10/The-Merger-of-Digicel-Claro-is-likely-to-hurt-Mobile-Phone-Customers-Mr-David-Miller.pdf">http://iftc.gov.jm/wp-content/uploads/2017/10/The-Merger-of-Digicel-Claro-is-likely-to-hurt-Mobile-Phone-Customers-Mr-David-Miller.pdf</a></p> <p>109. Luke Douglas, National network promises affordable Internet for all Jamaicans <a href="https://jamaica.loopnews.com/content/national-network-promises-affordable-internet-all-jamaicans">https://jamaica.loopnews.com/content/national-network-promises-affordable-internet-all-jamaicans</a></p> <p>110. Scotia makes additional changes to operations <a href="https://jamaica.loopnews.com/content/scotia-makes-additional-changes-operationas">https://jamaica.loopnews.com/content/scotia-makes-additional-changes-operationas</a></p> <p>111. Vision 2030 Jamaica ICT Sector Plan <a href="https://www.sma.gov.jm/wp-content/uploads/2009/09/Microsoft-Word-Vision-2030-Jamaica-First-Draft-ICT-Sector-Plan-Novemb.pdf">https://www.sma.gov.jm/wp-content/uploads/2009/09/Microsoft-Word-Vision-2030-Jamaica-First-Draft-ICT-Sector-Plan-Novemb.pdf</a></p> <p>112. Vision 2030 Jamaica National Development Plan</p> |   |  |

|      |  |
|------|--|
| 113. | <a href="http://observatorioplanificacion.cepal.org/sites/default/files/plan/files/Jamaica_Vision_2030_Jamaica_NDP_Full_No_Cover_web.pdf">http://observatorioplanificacion.cepal.org/sites/default/files/plan/files/Jamaica_Vision_2030_Jamaica_NDP_Full_No_Cover_web.pdf</a><br>ICT for Development, Vision 2030 Jamaica ICT Sector Plan<br><a href="https://www.mset.gov.jm/wp-content/uploads/2019/09/ICT-Sector-Plan-Complete.pdf">https://www.mset.gov.jm/wp-content/uploads/2019/09/ICT-Sector-Plan-Complete.pdf</a> |
| 114. | New IDB-supported national identity system in Jamaica to cut transaction costs, facilitate services<br><a href="https://www.iadb.org/en/news/news-releases/2017-12-08/jamaica-national-identification-system-loan%2C12001.html">https://www.iadb.org/en/news/news-releases/2017-12-08/jamaica-national-identification-system-loan%2C12001.html</a>   |
| 33.  | Medium Term Socio-Economic Policy Framework 2018-2021<br><a href="https://www.pioj.gov.jm/wp-content/uploads/2019/08/MTF-2018-2021-March-2019.pdf">https://www.pioj.gov.jm/wp-content/uploads/2019/08/MTF-2018-2021-March-2019.pdf</a>   |
| 34.  | NATIONAL DIASPORA POLICY<br><a href="https://mfaft.gov.jm/jm/wp-content/uploads/2019/03/National-Diaspora-Policy.pdf">https://mfaft.gov.jm/jm/wp-content/uploads/2019/03/National-Diaspora-Policy.pdf</a>  |
| 115. | Remittance customers switch to digital channels <a href="https://jamaica.loopnews.com/content/remittance-customers-switch-digital-channels">https://jamaica.loopnews.com/content/remittance-customers-switch-digital-channels</a>  |
| 116. | <a href="https://www.worldremit.com/">https://www.worldremit.com/</a>  |

### 15.3.8 Infrastructure and Energy

| Transport                                 |   |
|---|---|
| Overview                                  | Inland transportation is mainly by car.<br>The main public transportation is buses and taxis. There were domestic flights until 2020. There is a railway network owned by Jamaica Railway Corporation, but its operation is very limited. |
| Leadership governance                     | Ministry of Transport & Mining  |
| Major development partners                | JICA / UNDP / IADB  |
| Energy and electricity                    |   |
| Overview                                  | 92% of primary energy is imported fossil fuels, mainly petroleum.<br>89% of the electrical energy mix is fossil fuel.   |
| Carbon neutral national plan              | No information.<br>Target: Reduce GHG emissions by 25.4 to 28.5% by 2030 (NDC in 2020) and reduce power generation from renewable energy to 50% (announced in 2018 PM)  |
| Leadership governance and utility company | Ministry of Science, Energy and Technology (MSET)<br>Jamaica Public Services Co. Ltd. (JPS)   |
| Major development partners                | JICA / UNDP / IADB / USAID / GIZ  |

Source: JICA Study Team with reference to various websites of the government organization and international organization (WB / IEA / IRENA / US DOE).

### 15.3.9 Tourism

The Minister of Tourism is highly interested in strengthening tourism resilience

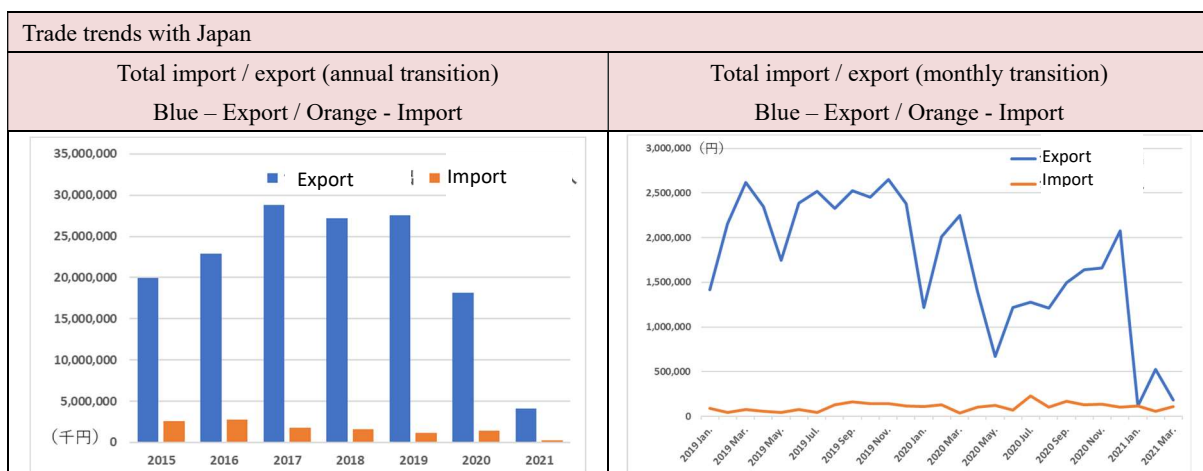
|   |  |   |
|---|--|---|
| Number of international tourist arrivals (2019) | 2,681 thousand   |   |
| International Tourism Receipts (2018)           | USD 3,099 million  |   |
| Tourism Competitiveness Ranking (2019)          | 3.7 out of 7 (76th out of 140 countries)<br>Highly rated fields: Priority of tourism / travel (6.2 out of 7 points, 2nd out of 140 countries)<br>Low-rated fields: Environmental sustainability (3.4 points out of 7 points, 137th out of 140 countries) |   |
| Tourism Dependency Index (2019)                 | 38.7 (13th out of 166 countries)   |   |
| Government of Japan policy                      | Number of JICA projects in the last 10 years   | none  |
|   | References to the Country Assistance Policy  | none  |
|   | Interest in pilot projects   | Yes (Pilot project to strengthen tourism resilience)  |
| Tourism industry vulnerability                  | Contribution of Travel & Tourism to GDP (2019)   | 31.1% (7th out of 23 countries)   |
|   | Contribution fo Travel & Tourism to employment (2019)  | 32.8% (10th out of 23 countries)  |
|   | Ratio of international spending (2019)   | 90% (8th out of 23 countries)   |
|   | Top 3 countries of origin of visitors (2019)   | USA (68.59%)<br>Canada (14.75%)<br>UK (8.39%)   |
| Importance of tourism                           | Ratio of the budget amount of tourism-related ministries to the national budget amount (2019)  | 1.4% (8th out of 16 countries)<br>National budget: JMD 803,240,569,000<br>Budget of tourism-related ministries: JMD 11,525,361,000  |
|   | Whether or not it is mentioned as a priority sector in the National Economic and Social  | Yes<br>Plan name: Vision 2030 Jamaica: national development plan<br>Reference example: National Outcome # 12 – Tourism as one of the Internationally Competitive Industry Structures (p. 229) |

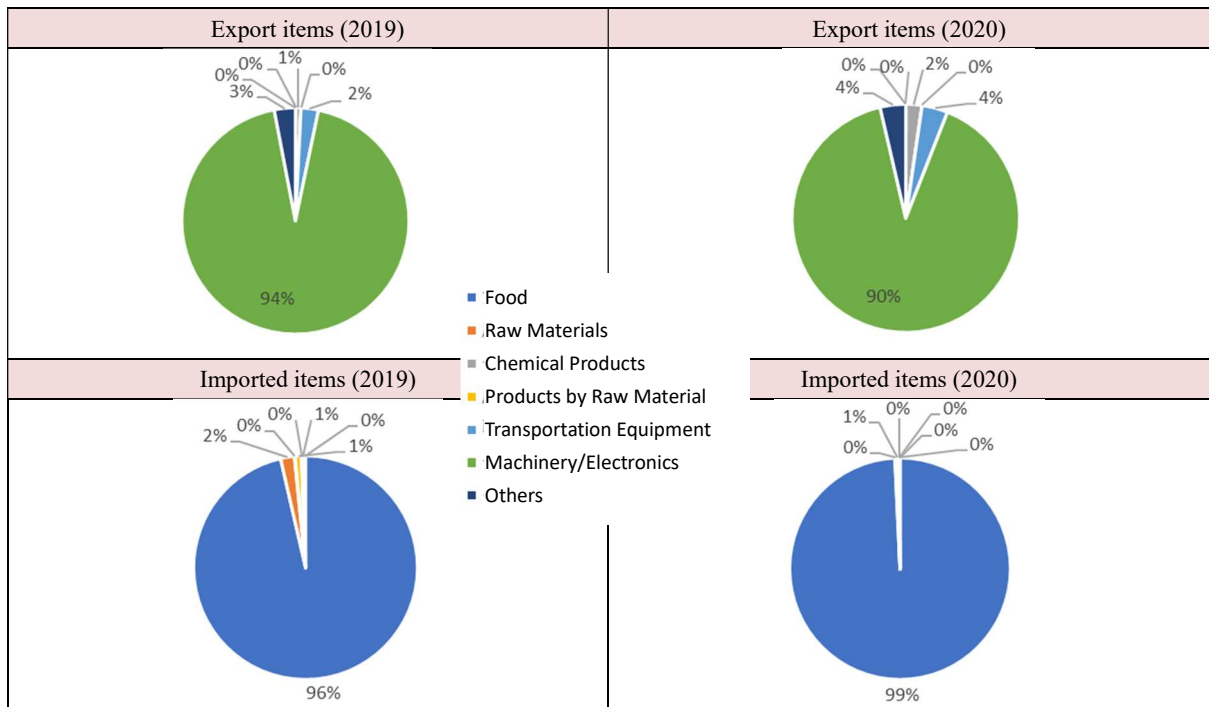
|  |   |   |
|--|---|---|
|  | Development Plan  |   |
|  | Existence of effective national tourism policies / strategies / plans       | Yes (Vision 2030 Jamaica Tourism Sector Plan)   |
| Impact of COVID-19   | Changes in the contribution of Travel & Tourism to GDP (2019 → 2020)        | -60.3% (11th out of 23 countries)   |
|  | Changes in the contribution of Travel & Tourism to employment (2019 → 2020) | -25.9% (14th out of 23 countries)   |
| Number of government support measures for the tourism sector |   | 4 (Monetary policy: 1, Employment and skills: 1, Resumption of tourism: 1, Health and safety protocol: 1) |

Source: Survey Team

### 15.3.10 Public-private partnership

|  | item   | Contents     |
|--|--|--------------|
| No. of JICA Public-Private Partnership Projects (After 2012)                 | Cooperation preparatory survey (overseas investment and financing) (former PPP infrastructure project)           | 0 cases      |
|  | Overseas investment and loan   | 0 cases      |
|  | SME Partnership Promotion Survey (support for Small-sized Enterprise)  | 0 cases      |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for small- and medium- sized enterprise) | 0 cases      |
|  | SDGs Business Verification Survey with Private Sector (support for small- and medium- sized enterprise)          | 0 cases      |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for large enterprise)                    | 0 cases      |
|  | SDGs Business Verification Survey with Private Sector (support for large enterprise)                             | 0 cases      |
| Total number of Japanese private companies entering the market (2019 survey) | Total number of business locations   | 16 companies |
|  | Overseas branches of Japanese companies,   | 0 companies  |
|  | Local corporations wholly owned by Japanese companies and their branches   | 3 companies  |
|  | Branch offices wholly owned by Japanese companies and their branches   | 0 companies  |
|  | joint ventures (local corporations in which Japanese companies have a direct or indirect stake of 10% or more)   | 2 companies  |
|  | joint ventures (Branch offices in which Japanese companies have a direct or indirect stake of 10% or more)       | 0 companies  |
|  | companies established overseas by Japanese nationals (in which Japanese nationals have a stake of 10% or more)   | 11 companies |
|  | Unknown classification   | 0 companies  |
| Number of Japanese residents (2020 survey)                                   | Total  | 216 people   |
|  | Long-term residents  | 188 people   |
|  | Permanent resident   | 28 people    |
| Business Environment   | Doing Business 2020 Rank   | 71st place   |
| PPP Project  | Existence of PPP law scheme  | ○            |
|  | PPP project with Japanese companies  | 2 cases      |





Gathering information about the PPP system

| Task Item   | Inquiries/comments/status<br>Title of submitted file  | Source/URL  |
|---|---|---|
| <b>PRIORITY 4_PPP Sector</b>  |   |   |
| PPP Projects in selective countries<br>PPP rules and regulations in Central America and Caribbean Countries |   | All below can be useful   |
| PPP laws and Regulations<br>if there is any, when, and how  | Public Sector Procurement Policy  | <a href="https://www.mof.gov.jm/procurement/public-sector-procurement-policy.html">https://www.mof.gov.jm/procurement/public-sector-procurement-policy.html</a>   |
|   | Policy and Institutional Framework for the Implementation of a Public-Private Partnership Program for the GoJ   | <a href="https://www.mof.gov.jm/documents/documents-publications/document-centre/file/165.html">https://www.mof.gov.jm/documents/documents-publications/document-centre/file/165.html</a>   |
| PPP Unit Organization<br>if there is any, how structured  | Strategic oversight of the PPP Programme (Policy and process) is the responsibility of Cabinet through the Ministry/ies with responsibility for the DBJ and MOF PPP Units. The Public Investment Management Committee recommends to Cabinet the approval of PPP projects for development. PIMC is supported by the PIMSec. Operational management of the process is the responsibility of the two PPP Units in DBJ and MOF and Enterprise Teams, Project Teams and Contract Management Teams in MDAs.   | <a href="https://www.mof.gov.jm/documents/documents-publications/document-centre/file/165.html">https://www.mof.gov.jm/documents/documents-publications/document-centre/file/165.html</a>   |
| PPP sectors<br>in what sectors are the PPPs allowed   | Not specified in law and regulation   |   |
| Proposal Types (Solicited or Unsolicited)<br>unsolicited  | It is admitted requested and not requested, in the policy the unsolicited proposals are described in more depth. (policy - seccion 9.0 - Page 38)   | <a href="https://www.mof.gov.jm/documents/documents-publications/document-centre/file/165.html">https://www.mof.gov.jm/documents/documents-publications/document-centre/file/165.html</a>   |
| PPP Forms<br>BOT, BTO, DB, , , , what form are allowed  | The PPP forms with data available:<br>- BOO<br>- BOT<br>- BROT<br>- P<br>- ROT<br><br>See file "210520_PPP Database" sheet "Resume PPP"   | <a href="https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CNI%2CCLC&amp;header=true">https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CNI%2CCLC&amp;header=true</a> |
| PPP types<br>Availability payment, service purchase   | The GOJ's PPP programme may be funded from the following sources which will be identified by the PPP Unit in conjunction with the Ministry of Finance:<br>• Low-cost debt financing to GOJ<br>• Grant funding from multilateral institutions<br>• Infrastructure Funds<br>• Bond floats on the local or international capital markets<br>• A Nominal Cess to be withheld /deducted (up to 2%) from proceeds of each PPP transaction   | <a href="https://www.mof.gov.jm/documents/documents-publications/document-centre/file/165.html">https://www.mof.gov.jm/documents/documents-publications/document-centre/file/165.html</a>   |
| PPP Project Trends<br>how much PPP projects in the last 10 years  | 11 (2010 to 2020)<br>- West Kingston Power Project (JEP III) (2010)<br>- Highway 2000 Infrastructure Project (Phase 1A and 1B) (2011)<br>- North South Link of the Highway 2000 (2013)<br>- Malvern Wind Park (2015)<br>- Claredon Solar (2015)<br>- Content Solar (2015)<br>- Kingston Freeport Terminal Limited (2016)<br>- Eight Rivers Energy (2017)<br>- Old Harbour Combined Cycle Power Station (2017)<br>- Paradise Park PV Solar Plant (2018)<br>- Norman Manley International Airport concession (2019)<br><br>See file "210520_PPP Database" | <a href="https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CU&amp;header=true">https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CU&amp;header=true</a>   |
| Participation of Japanese firms in PPP Projects<br>if any (check news source)                               | - Jamaica Public Service Co. (2001), Marubeni Corp.   | <a href="https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CU&amp;header=true">https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CU&amp;header=true</a>   |
| Any notable points for each country<br>if any   | Jamaica's Public Private Partnerships (PPP) Programme   | <a href="https://www.mof.gov.jm/documents/documents-publications/document-centre/file/1266-jamaicas-ppp-programme.html">https://www.mof.gov.jm/documents/documents-publications/document-centre/file/1266-jamaicas-ppp-programme.html</a>   |

Source: Survey Team

## 16. Mexico

### 16.1 Country overview (basic information)

#### 16.1.1 Basic information

The United States of Mexico (Spanish: Estados Unidos Mexicanos), commonly known as Mexico, is a federal republic located in southern North America. It borders the United States to the north, Guatemala and Belize to the southeast, the Pacific Ocean to the west, and the Gulf of Mexico and the Caribbean Sea to the east. The capital is Mexico City. With a total population of about 130 million (as of 2016), it is the most populous country in the Spanish-speaking world. GDP is second only to Brazil in Latin America. On the diplomatic side, he has formed an alliance with the neighboring United States of America after the war and is under the strong influence of it, but he is engaged in multidimensional diplomacy that makes the best use of history and culture. As an example, since the Cold War after World War II, it has maintained deep relations with the neighboring United States, while maintaining relations with eastern countries such as the Soviet Union and Cuba. In particular, it has continued diplomatic relations with its neighboring country, Cuba, since the Cuban Revolution in 1959, as neighboring Latin American and Caribbean countries broke off relations with Cuba based on pan-Americanism. Regarding relations with Japan, while Japan has signed trade treaties with other countries after the opening of the country, the Japan-India Friendship Trade Treaty concluded in 1888 (Meiji 21) is virtually the first equal treaty for Japan, and is currently in other countries. Of the embassies in Japan, only the Mexican embassy is said to be located in Nagata-cho, Chiyoda-ku, Tokyo. In terms of economy, it is the 15th largest in the world in terms of GDP, which is almost the same size as South Korea, and the GDP per capita is \$ 10,650, which is slightly higher than the world average. An observer of the Mercosur and the Union of South American Nations, and a member of the Organization for Economic Co-operation and Development (OECD), Asia-Pacific Economic Cooperation (APEC), and the North American Free Trade Agreement (NAFTA).

#### 16.1.2 General circumstances

|             |  |                 |   |
|-------------|--|-----------------|---|
| 1 area      | 1.96 million square kilometers (about 5 times that of Japan) | 2 Population    | Approximately 126.19 million (2018 World Bank)  |
| 3 Capital   | Mexico City  | 4 ethnic groups | Mixed race of European (Spanish etc.) and indigenous people (60%), Indigenous people (30%), European (Spanish etc.) (9%), Others (1%) |
| 5 languages | Spanish  | 6 religion      | Catholic (about 90% of the people)  |

Source: Ministry of Foreign Affairs HP Mexico US Basic Data

#### 16.1.3 Economic overview

|                          |  |                              |   |
|--------------------------|--|------------------------------|---|
| 1 Major industry         | Manufacturing, steel, and commerce represented by the automobile industry for export   | 2 GDP<br>3 GNI / person      | \$ 1,223 Billion (2018 IMF)<br>US \$ 19,860 (2019, WDI) |
| 4 Economic growth rate   | 2.0% (2018 IMF)  | 5 Unemployment rate          | 3.43% (2019 INEGI)                                      |
| 6 Price increase rate    | 4.83% (2018 INEGI),  |                              |   |
| 7 Total trade amount     | Exports: \$ 450.6 billion (2018 INEGI)<br>Import: US \$ 464.3 billion (2018 INEGI)   |                              |   |
| 8 Major trade items      | Export: Automotive-related, industrial products such as electrical and electronic equipment, mining products, agricultural products<br>Import: Automobiles / automobile parts, electrical / electronic equipment and its parts, industrial machinery       |                              |   |
| 9 Major trading partners | Since the entry into force of NAFTA in 1994, economic relations with the United States have strengthened, and the United States accounts for about 46% of all imports and about 80% of all exports (Ministry of Economy, Trade and Industry, Mexico 2018). |                              |   |
| 10 currencies            | Mexican pesos  | 11 Foreign currency reserves | \$ 174.6 billion (2018 Central Bank)                    |
| 12 National budget       | na   | 13 External debt balance     | \$ 342.7 billion (2018 Central Bank)                    |



|    |                   |  |
|----|-------------------|--|
| 14 | Economic overview | <p>(1) Mexico achieved APEC participation (1993), NAFTA entry into force (1994), and OECD accession (same year) in the early 1990s. A currency crisis occurred in December 1994. After that, although he experienced a serious recession, the trade balance turned into the black due to the depreciation of the peso that occurred after the crisis. GDP growth rate also recorded high growth of over 5% in 1996 and 1997. In 1999 and 2000, exports expanded against the backdrop of the strong US economy and soaring oil prices.</p> <p>(2) The real economic growth rate in recent years fell to 3.2% in 2007 due to the slump in the export manufacturing industry such as automobiles due to the deterioration of the US economy, and to 1.4% in 2008. In 2009, it was -4.7% due to the impact of the global economic crisis, but in 2010 it recovered to 5.1%. It was 4.0% in 2011 and 2012, 1.4% in 2013, and 2.1% in 2014.</p> <p>(3) In response to the recent slump in crude oil prices, the Mexican government announced spending cut measures in January 2015, but due to the recovery trend of the US economy and the depreciation of the peso, exports to North America became firm and the domestic private sector. Due to strong consumption, the growth rate was 2.5% in 2015, 2.3% in 2016, 2.1% in 2017, and 2.0% in 2018, recording positive growth for the ninth consecutive year.</p> |
|----|-------------------|--|

Source: Ministry of Foreign Affairs HP Mexico US Basic Data

## 16.1.4 Country-specific development cooperation policy

### (1) Government of Japan Development Cooperation Policy by Country

**Table 16-1 Overview of Japan's ODA to Mexico**

|                                      |   |
|--------------------------------------|---|
| 1. 1. Overview                       |   |
|                                      | Japan's economic cooperation with Mexico began in 1969 and has been implemented using various schemes since then. Technical cooperation began in earnest with the opening of the Mexico Office of the Overseas Technical Cooperation Agency (OTCA, now JICA) in 1973, and was enhanced by the Japan-Mexico Technical Cooperation Agreement concluded in 1986. In the year, it became the largest recipient of technical cooperation in Central America. Currently, we are providing cooperation support centered on technical cooperation and grant-in-aid for human security for grassroots and human security.  |
| 2. 2. Aim of development cooperation |   |
|                                      | Mexico, the second largest economy in Latin America, is a politically and economically important country for Japan, and the number of Japanese companies expanding into Mexico has been steadily increasing in recent years, so cooperation with the country is important. Sex is increasing. In addition, the country is strengthening its support for Latin American countries, such as establishing the International Development Cooperation Agency (AMEXCID), and expectations are rising for its contribution to the development of the entire region.  |
| 3. 3. Basic policy                   |   |
|                                      | The basic policy is to support Mexico to achieve the realization of an inclusive nation by further promoting sustainable economic growth and benefiting the benefits of economic development to the country's society as a whole. Japan-Mexico Partnership Program (JMPP: Japan) is a program that supports industrial promotion, especially the promotion of small and medium-sized enterprises and supporting industries that are difficult to enjoy the benefits of economic development, and promotes triangular cooperation in the region. Through the Mexico Partnership Program), we will support the development of the entire Latin American region. |
| 4. Priority areas                    |   |
|                                      | <p>(1) Industrial promotion: We will provide support for improving the technological capabilities of small and medium-sized enterprises that make up the supporting industries. In addition, we will work on comprehensive industrial promotion from various approaches such as industry-academia-government collaboration.</p> <p>(2) Triangular cooperation: Support will be provided for technical cooperation, human resource development, and strengthening of aid implementation capabilities so that effective cooperation can be implemented in response to the needs of Latin American countries.</p>  |

Source: Ministry of Foreign Affairs HP Mexico United States Data Collection 2017

**Table 16-2 National Development Cooperation Policy for Mexico (April 2014)**

|                                    |  |
|------------------------------------|--|
| 3. 3. Priority field (medium goal) |  |
| (1)<br>Industrial promotion        | Since industrial promotion, especially promotion of small and medium-sized enterprises and supporting industries, is directly linked to raising the income of the people from the viewpoint of not only economic growth but also job creation, we provide support for improving the technological capabilities of small and medium-sized enterprises that make up the supporting industries. do. In addition, we will work on comprehensive industrial promotion from various approaches such as industry-academia-government collaboration. |
| (2)<br>Triangular cooperation      | We will provide support for technical cooperation, human resource development, and strengthening of aid implementation capabilities, mainly in fields such as environmental conservation and agricultural support, so that effective cooperation can be implemented in response to the needs of Latin American countries.  |



## (2) Survey on COVID-19 by development partners

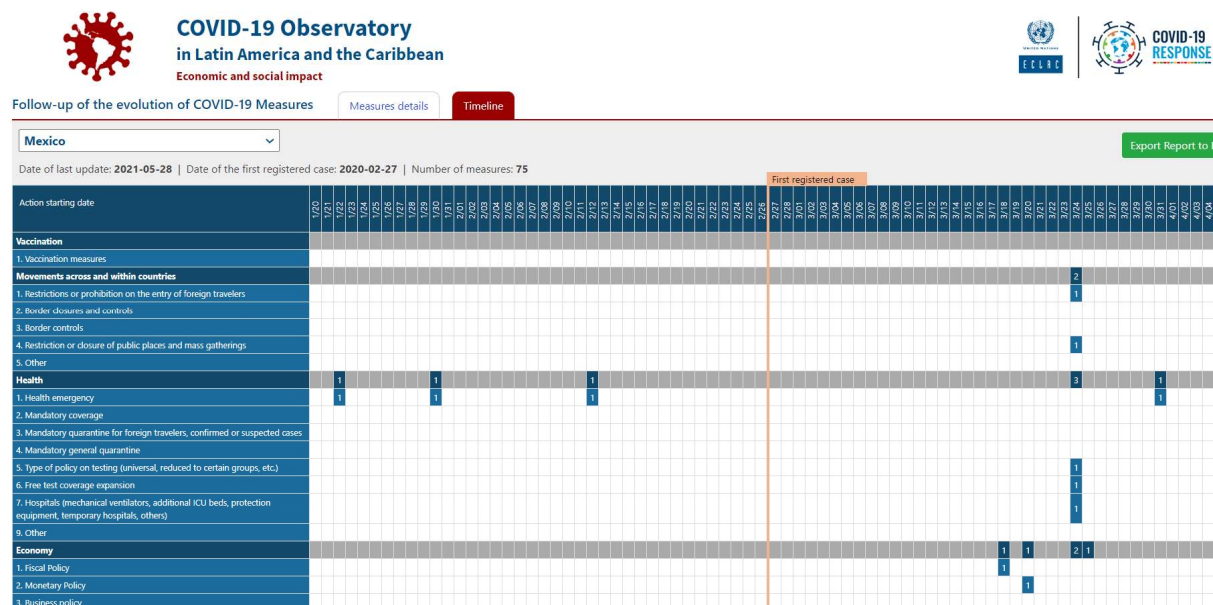
We extracted sector names and specific quantitative figures that have a large impact on the country-specific analysis described in various reports of development partners. Reports from the World Bank, OECD, BCIE, SICA, and the Ministry of Economy, Trade and Industry of Japan suggest the importance of introducing digitalization and innovation (Fintech, Aggrotech, Autotech, etc.), and incorporate the survey results of these development partners. I arranged it accordingly.

World Bank: "Growth and Revitalization" 2021 Semi-Annual Economic Report (March 2021)

- ✓ OECD: COVID-19 in LAC, Regional socio-economic implications and policy priorities (December 2020)
- ✓ BCIE: Impacto Económico del COVID-19 (April 2020)
- ✓ SICA: Estimación del Impacto Económico del COVID-19 en Centroamérica y República Dominicana (April 2020)
- ✓ Ministry of Economy, Trade and Industry of Japan: "Economic and Industrial Policy Based on the Impact of the New Corona Virus" (June 2020), Accelerating Digitization and Onlineization, Gig Economy, Innovation in the Transition to a New Everyday Life 1) Medical care / health, 2) Digital: Infrastructure development premised on the arrival of a digital society, 3) Green: Response to climate change problems, Energy security, 4) Emphasizes resilience.

### 16.1.5 Policies for COVID-19 measures taken by governments of each country

Various policies for COVID-19 taken by the government are described on the ECLAC homepage "COVID-19 Observatory" by country, time series, and field, and can be analyzed.



Source: <https://cepalstat-prod.cepal.org/forms/covid-countrysheet/index.html?table=2&country=MEX>

In this survey, the 56 policies implemented in Mexico posted on this website were classified by sector as much as possible.

#### 1) Infection spread and alleviation of aggravation and death

No material was available.

#### 2) Support for affected industries and people

**Table 16-3 Support for Affected Industries and People (Mexico)**

| Various government policies (COVID-19 Observatory for LAC) |    |  |  |
|--|----|--|--|
| Socioeconomic policy                                       | 25 |  |  |
| Health care & nutrition                                    | 10 |  |  |
| Education  | 1  |  |  |
| Agriculture & rural development                            | 0  |  |  |
| Private sector   | 14 |  |  |
| Environment & disaster prevention                          | 0  |  |  |
| Governance and social security                             | 5  |  |  |
| DX and innovation  | 1  |  |  |
| Infrastructure & energy                                    | 0  |  |  |
| Tourism  | 0  |  |  |
| PPP  | 0  |  |  |
| Others (b)   | 0  |  |  |
| total  | 56 |  |  |

Source: Survey Team

### 3) Arrangement of various policies for COVID-19 taken by the government

COVID-19 Observatory for Latin America and Caribbean (ECLAC) organized by governments

**Table 16-4 Government-directed COVID-19 Policy Categories (Mexico)**

#### Follow-up of the evolution of COVID-19 Measures

| Vaccination   | Economy  | Social protection   |
|---|--|---|
| 1. Vaccination measures   | 1. Fiscal Policy   | 1. Cash transfers (new transfers, increase in existing transfers, expansion of cash transfers to new recipients, early disbursement of transfers) |
| <b>Movements across and within countries</b>  | 2. Monetary Policy   | 2. Food transfers / In-kind transfers   |
| 1. Restrictions or prohibition on the entry of foreign travelers  | 3. Business policy   | 3. Guarantee of basic services  |
| 2. Border closures and controls   | 4. Restriction of economic activity (including shops and shopping centers)                             | <b>Education / schools</b>  |
| 3. Border controls  | 5. Price and quantity controls   | 1. Suspension of classes  |
| 4. Restriction or closure of public places and mass gatherings  | 6. Economic Stimulus (includes aggregate value of fiscal measures and separately of credit guarantees) | 2. Provision of tools for distance learning (online platforms, TV, radio, distance-learning materials)  |
| 5. Other  | 7. Regulation of the personal hygiene and cleaning products market                                     | 3. Maintenance of school feeding programme (indicating under which modalities)  |
| <b>Health</b>   | 8. Debt relief and suspension of credit payments (individuals, microentrepreneurs)                     | <b>Gender</b>   |
| 1. Health emergency   | 9. Other   | 1. Gender-based violence against women  |
| 2. Mandatory coverage   | <b>Labor</b>   | 2. Care economy   |
| 3. Mandatory quarantine for foreign travelers, confirmed or suspected cases                                   | 1. Labor Protection  | 3. Employment and income generation   |
| 4. Mandatory general quarantine   | 2. Elective work leave   | 4. Benefits, transfers and other social protection measures   |
| 5. Type of policy on testing (universal, reduced to certain groups, etc.)                                     | 3. Reduction of working hours  | 5. Women's participation in the digital era   |
| 6. Free test coverage expansion   | 4. Prohibition of dismissal from work  | 6. Other  |
| 7. Hospitals (mechanical ventilators, additional ICU beds, protection equipment, temporary hospitals, others) | 5. Other   |   |

Source: Survey Team

## 16.2 Macroeconomic analysis and selection of priority countries

### 16.2.1 Macroeconomic analysis

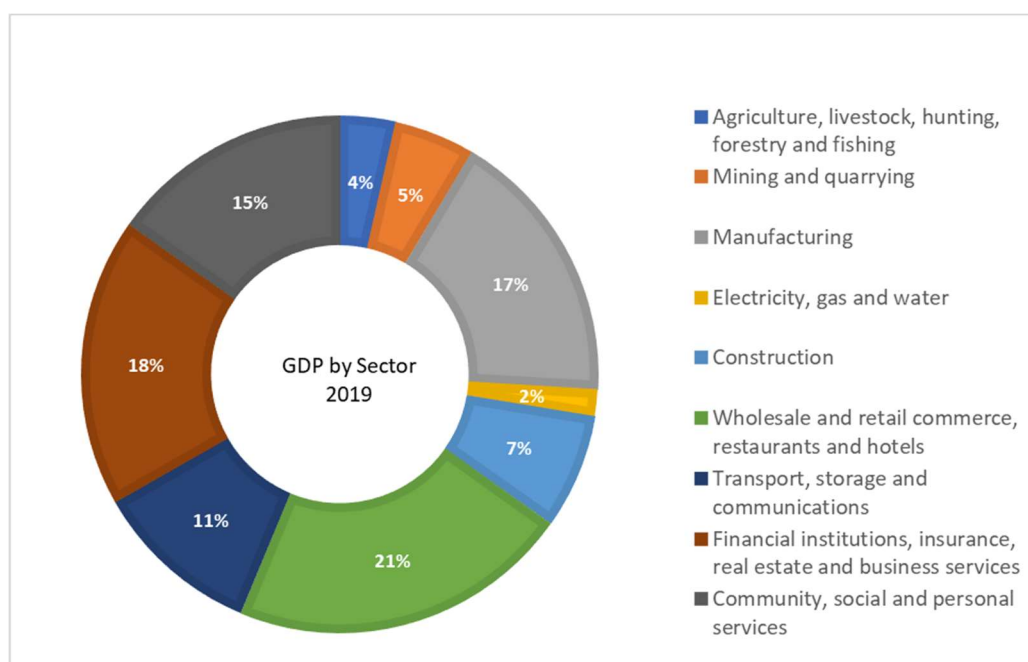
#### (1) Industrial composition

**Table 16-5 Industrial Composition (Mexico)**

Table: Gross domestic product, by sector (Millones de pesos a precios constantes de 2013)

|  | 2011       | 2012       | 2013       | 2014       | 2015       | 2016       | 2017       | 2018       | 2019a/     | 2020 b/    |
|--|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|
| Agriculture, livestock, hunting, forestry and fishing                | 469,662    | 499,516    | 510,906    | 530,063    | 541,029    | 560,060    | 578,962    | 592,121    | 593,807    | 605,258    |
| Mining and quarrying   | 1,147,827  | 1,160,655  | 1,153,599  | 1,131,756  | 1,081,656  | 1,034,812  | 949,009    | 895,685    | 857,567    | 848,010    |
| Manufacturing  | 2,466,335  | 2,563,504  | 2,576,976  | 2,680,409  | 2,759,115  | 2,801,946  | 2,879,959  | 2,935,141  | 2,950,487  | 2,654,468  |
| Electricity, gas and water   | 238,028    | 242,692    | 244,041    | 263,904    | 268,325    | 268,654    | 267,554    | 287,726    | 285,883    | 270,826    |
| Construction   | 1,200,980  | 1,230,058  | 1,210,696  | 1,242,661  | 1,268,215  | 1,288,920  | 1,284,363  | 1,290,003  | 1,223,477  | 1,012,683  |
| Wholesale and retail commerce, restaurants and hotels                | 2,923,928  | 3,036,277  | 3,086,975  | 3,191,813  | 3,338,094  | 3,430,232  | 3,549,995  | 3,655,798  | 3,642,853  | 3,164,703  |
| Transport, storage and communications                                | 1,225,356  | 1,297,509  | 1,336,186  | 1,390,128  | 1,501,924  | 1,603,931  | 1,692,105  | 1,758,043  | 1,777,986  | 1,517,813  |
| Financial institutions, insurance, real estate and business services | 2,615,434  | 2,733,491  | 2,822,902  | 2,924,521  | 3,082,314  | 3,217,883  | 3,290,140  | 3,378,788  | 3,073,219  | 3,029,494  |
| Community, social and personal services                              | 2,588,247  | 2,667,290  | 2,700,339  | 2,711,903  | 2,738,740  | 2,776,111  | 2,837,721  | 2,909,521  | 2,574,172  | 2,432,953  |
| Total  | 14,875,797 | 15,430,993 | 15,642,620 | 16,067,158 | 16,579,414 | 16,982,550 | 17,329,809 | 17,702,826 | 16,979,450 | 15,536,207 |

Source: ECLAC



Source: Survey Team

## (2) Trends in major economic indicators

**Table 16-6 Trends in Major Economic Indicator (Mexico)**

Table 1 MEXICO: MAIN ECONOMIC INDICATORS (Annual growth rates)

|  | 2011    | 2012    | 2013    | 2014    | 2015    | 2016    | 2017    | 2018    | 2019a/  | 2020 b/ |
|--|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Gross domestic product (Annual growth rates c/)                                      | 3.7     | 3.6     | 1.4     | 2.8     | 3.3     | 2.6     | 2.1     | 2.2     | -0.1    | -9.0    |
| Per capita gross domestic product (Annual growth rates c/)                           | 2.2     | 2.2     | 0.0     | 1.5     | 2.0     | 1.4     | 0.9     | 1.1     | -1.1    | -10.1   |
| Gross domestic product, by sector (Annual growth rates c/)                           |         |         |         |         |         |         |         |         |         |         |
| Agriculture, livestock, hunting, forestry and fishing                                | -3.8    | 6.4     | 2.3     | 3.7     | 2.1     | 3.5     | 3.4     | 2.3     | 0.4     | 1.9     |
| Mining and quarrying   | 0.4     | 1.1     | -0.6    | -1.9    | -4.4    | -4.3    | -8.3    | -5.6    | -5.1    | -1.1    |
| Manufacturing  | 3.2     | 3.9     | 0.5     | 4.0     | 2.9     | 1.6     | 2.8     | 1.9     | 0.4     | -10.0   |
| Electricity, gas and water   | 6.1     | 2.0     | 0.6     | 8.1     | 1.7     | 0.1     | -0.4    | 7.5     | 2.3     | -5.3    |
| Construction   | 4.0     | 2.4     | -1.6    | 2.6     | 2.1     | 1.6     | -0.4    | 0.4     | -4.9    | -17.2   |
| Wholesale and retail commerce, restaurants and hotels                                | 7.7     | 3.8     | 1.7     | 3.4     | 4.6     | 2.8     | 3.5     | 3.0     | -0.2    | -9.3    |
| Transport, storage and communications  | 3.9     | 5.9     | 3.0     | 4.0     | 8.0     | 6.8     | 5.5     | 3.9     | 0.8     | -14.6   |
| Financial institutions, insurance, real estate and business services                 | 3.3     | 4.5     | 3.3     | 3.6     | 5.4     | 4.4     | 2.2     | 2.7     | 0.4     | -1.2    |
| Community, social and personal services  | 2.5     | 3.1     | 1.2     | 0.4     | 1.0     | 1.4     | 2.2     | 2.5     | 0.3     | -8.2    |
| Balance of Payments (Millions of dollars)  |         |         |         |         |         |         |         |         |         |         |
| Current account balance  | -11,898 | -18,652 | -31,522 | -25,419 | -31,011 | -24,305 | -20,391 | -25,258 | -4,341  | 26,571  |
| Goods balance  | -1,205  | 291     | -909    | -2,795  | -14,599 | -13,070 | -10,984 | -13,767 | 5,212   | 34,445  |
| Exports, f.o.b.  | 350,004 | 371,442 | 380,729 | 397,651 | 380,977 | 374,305 | 409,806 | 451,083 | 461,040 | 417,825 |
| Imports, f.o.b.  | 351,209 | 371,151 | 381,638 | 400,447 | 395,575 | 387,375 | 420,790 | 464,850 | 455,828 | 383,380 |
| Services trade balance   | -15,591 | -14,905 | -14,058 | -13,292 | -9,777  | -8,960  | -9,759  | -11,188 | -8,269  | -10,171 |
| Income balance   | -18,692 | -26,676 | -38,496 | -32,677 | -30,925 | -29,354 | -29,764 | -33,187 | -36,563 | -37,769 |
| Net current transfers  | 23,590  | 22,638  | 21,942  | 23,345  | 24,290  | 27,079  | 30,116  | 32,885  | 35,279  | 40,066  |
| Capital and financial balance (Millions of dollars)                                  |         |         |         |         |         |         |         |         |         |         |
| Net foreign direct investment d/   | 12,277  | -1,142  | 32,717  | 22,922  | 24,749  | 30,627  | 30,257  | 27,117  | 23,591  | 22,551  |
| Other capital movements d/   | 27,919  | 37,318  | 16,594  | 18,825  | -9,405  | -6,458  | -14,631 | -1,376  | -16,612 |         |
| Foreign remittance from abroad for 2019 and 2020                                     | 21,504  | 9,500   | 10,815  | 9,071   | -15,581 | -5,185  | -14,138 | -7,446  | -29,584 |         |
| Remittances from emigrant workers  | 22,803  | 22,438  | 22,303  | 23,647  | 24,785  | 26,993  | 30,291  | 33,677  | 36,439  | 26,396  |
| Microfinance dispatched and the sectors that received microfinance for 2019 and 2020 |         |         |         |         |         |         |         |         |         |         |
| Activo Total en (Millones de Pesos) e/   | 37,796  | 43,522  | 65,623  | 63,209  | 70,476  | 73,413  | 73,975  | 78,865  | 87,927  |         |
| Tipo de cambio Promedio Anual Pesos por Dólar f/                                     | 12      | 13      | 13      | 13      | 16      | 19      | 19      | 19      | 19      | 22      |
| Activo Total en (Millones de Dólares)  | 3,041   | 3,305   | 5,139   | 4,751   | 4,438   | 3,928   | 3,913   | 4,100   | 4,566   |         |
| Número de beneficiarios (millones de personas) e/                                    | 5       | 6       | 7       | 7       | 7       | 3,928   | 7       | 7       | 7       | 7       |

Source: Economic Survey of Latin America and the Caribbean 2020: Main conditioning factors of fiscal and monetary policies in the post-COVID-19 era

### 16.2.2 Impact analysis and identification of key sectors

#### (1) Impact assessment results for each sector by AHP analytic hierarchy process based on economic indicators

**Table 16-7 Results of Sector Impact Analysis by COVID-19 (Mexico)**

| ECLAC category   | Changes around COVID-19 | Trends before COVID-19 | Total GDP ratio of the sector | comprehensive evaluation |   |
|--|-------------------------|------------------------|-------------------------------|--------------------------|---|
| Importance (weight)  | 0.4590                  | 0.0660                 | 0.0750                        |                          |   |
| Agriculture, livestock, hunting, forestry and fishing                | 2                       | 4                      | 2                             | 0.030                    | 8 |
| Mining and quarrying   | 1                       | 1                      | 3                             | 0.017                    | 9 |
| Manufacturing  | 7                       | 5                      | 7                             | 0.090                    | 3 |
| Electricity, gas and water   | 4                       | 6                      | 1                             | 0.051                    | 7 |
| Construction   | 8                       | 2                      | 4                             | 0.091                    | 2 |
| Wholesale and retail commerce, restaurants and hotels                | 6                       | 8                      | 9                             | 0.088                    | 4 |
| Transport, storage and communications                                | 9                       | 9                      | 5                             | 0.113                    | 1 |
| Financial institutions, insurance, real estate and business services | 3                       | 7                      | 8                             | 0.054                    | 6 |
| Community, social and personal services                              | 5                       | 3                      | 6                             | 0.065                    | 5 |

Source: Survey Team

## 1) Amendment of ECLAC sector classification to this sector classification and selection of priority sectors

In line with the method described in the main volume, the Sector Classification is divided into the Vertical Sector and the Cross-Cutting Sector, the ECLAC classification sector is allocated to the Vertical Sector Classification, and the evaluation of various policies related to COVID-19 taken by the government along with the results of the partner survey and the indicators of the national development cooperation policy, the ranking of priority sectors are calculated using the four indicators, which are described in the table below.

**Table 16-8 Ranking of Priority Sectors (Mexico)**

|                                   | Economic Indicator Analysis | Government Policy on COVID-19 | Survey on COVID-19 by Development Partners | Country Development Cooperation Policy | Base Case |   | Priority |
|-----------------------------------|-----------------------------|-------------------------------|--|--|-----------|---|----------|
| Importance (weight)               | 0.6000                      | 0.2000                        | 0.1000                                     | 0.1000                                 |           |   |          |
| Social and Economic Policy        | 0.0000                      | 0.0893                        | 0.0000                                     | 0.0250                                 | 0.1143    |   | ○        |
| Health and Nutrition              | 0.0391                      | 0.0357                        | 0.0000                                     | 0.0000                                 | 0.0748    | 4 |          |
| Education                         | 0.0278                      | 0.0036                        | 0.0000                                     | 0.0250                                 | 0.0563    | 6 |          |
| Agriculture and Rural Development | 0.0639                      | 0.0000                        | 0.0100                                     | 0.0000                                 | 0.0739    | 5 |          |
| Manufacturing                     | 0.1861                      | 0.0500                        | 0.0200                                     | 0.0250                                 | 0.2811    | 1 | ○        |
| Environment/ Disaster Management  | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0250                                 | 0.0250    |   | ○        |
| Governance and Security           | 0.0000                      | 0.0179                        | 0.0000                                     | 0.0000                                 | 0.0179    |   | ○        |
| DX Innovation                     | 0.0000                      | 0.0036                        | 0.0300                                     | 0.0000                                 | 0.0336    |   | ○        |
| Infrastructure and Every          | 0.2170                      | 0.0000                        | 0.0200                                     | 0.0000                                 | 0.2370    | 2 | ○        |
| Tourism                           | 0.0661                      | 0.0000                        | 0.0200                                     | 0.0000                                 | 0.0861    | 3 | ○        |
| Public-Private Partnership        | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0000                                 | 0.0000    |   | ○        |

Source: Survey Team

## (2) Sensitivity analysis

### 1) Analysis case settings

Based on the above methodology, the following case settings were made.

**Table 16-9 Sensitivity Analysis Case-based Weighting Settings (Mexico)**

|  | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|--|-----------|------------------------|------------------------|------------------------|
| Economic indicator analysis  | 0.6       | 0.6                    | 0.5                    | 0.5                    |
| Investigation and arrangement of various policies for COVID-19 taken by the government | 0.2       | 0.1                    | 0.1                    | 0.1                    |
| Development partner survey results   | 0.1       | 0.2                    | 0.2                    | 0.3                    |
| Country-specific development cooperation policy  | 0.1       | 0.1                    | 0.2                    | 0.1                    |

Source: Survey Team

## 2) Summary of sensitivity analysis

The results of each sensitivity analysis are as summarized below. Sensitivity analysis did not show much change, which was close to the result of the base case.

**Table 16-10 Summary of Sensitivity Analysis Results (Mexico)**

|                                   | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|-----------------------------------|-----------|------------------------|------------------------|------------------------|
| Social and economic policy        |           |                        |                        |                        |
| Health care / nutrition           | 4         | 5                      | 6                      | 5                      |
| education                         | 6         | 6                      | 4                      | 6                      |
| Agriculture / rural development   | 5         | 4                      | 5                      | 4                      |
| Manufacturing industry            | 1         | 1                      | 1                      | 1                      |
| Environment / disaster prevention |           |                        |                        |                        |
| Governance and citizen security   |           |                        |                        |                        |
| DX / Innovation                   |           |                        |                        |                        |
| Infrastructure and Energy         | 2         | 2                      | 2                      | 2                      |
| sightseeing                       | 3         | 3                      | 3                      | 3                      |
| Public-private partnership        |           |                        |                        |                        |

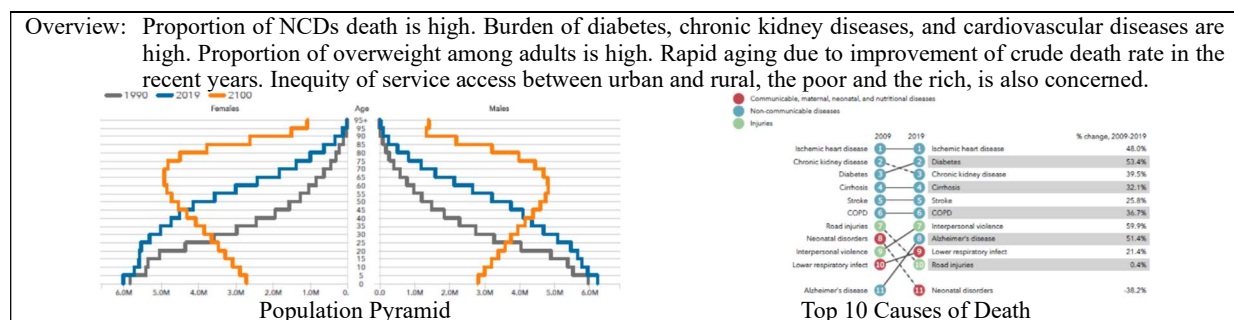
Source: Survey Team

### **(3) Selection of priority sectors by country**

From the above results, 1) social / economic policy, 2) manufacturing industry, 3) environment / disaster prevention, 4) governance / citizen security, 5) DX / innovation, 6) infrastructure / energy, 7) tourism, 8) public-private partnership are selected as priority sectors.

## 16.3 Country-specific information by sector

### 16.3.1 Health care / nutrition



| Demography                                      |   |   |   |   |                                       |                                  |  |
|---|---|---|---|---|---------------------------------------|----------------------------------|--|
| Population                                      | Urban population (%)                      | Urban population growth (%)             | Life Expectancy (years)                     |   |                                       | Population ≥ 65 (%)              |  |
|   |   |   | Male  | Female  | Both                                  |                                  |  |
| 126,190,788                                     | 80.44                                     | 1.45                                    | 77.84                                       | 72.12   | 74.99                                 | 7.22                             |  |
| Maternal, Newborn and Child Health              |   |   |   |   |                                       |                                  |  |
| Total fertility rate                            | Neonatal mortality (per 1,000 livebirths) | Under 5mortality (per 1,000 livebirths) | Maternal mortality (per 100,000 livebirths) | Antenatal care ≥ 4 (%)                          | Immunization (1yr)                    |                                  |  |
| 2.13  | 8.70                                      | 14.70                                   | 33  | 94  | DTP (%)                               | MCV1 (%)                         |  |
|   |   |   |   |   | 88                                    | 97                               |  |
| Nutrition                                       |   |   |   | Health Finance                                  |                                       |                                  |  |
| Under 5 Children                                |   | Adult overweight (%)                    |   | Current health expenditure per capita (USD PPP) | Current health expenditure to GDP (%) | Out-of-pocket expenditure (%)    |  |
| Stunting (%)                                    | Overweight (%)                            | Male                                    | Female                                      |   |                                       |                                  |  |
| 10  | 5.3                                       | 45                                      | 43  | 1,138   | 5.37                                  | 41                               |  |
| Health Service Provision (per 1,000 population) |   |   |   | COVID-19 related Indicators as of January 2022  |                                       |                                  |  |
| Hospital beds                                   | Doctors                                   | Nurses                                  | Total confirmed cases (per million)         | Total death (per million)                       | Total number of tests (per 1,000)     | People completed vaccination (%) |  |
| 1.38  | 2.4                                       | 2.9                                     | 34,509.70                                   | 2,319.26  | 100.08                                | 58.77                            |  |

Source: Graphs=Institute for Health Metrics and Evaluation, County Profile; Demography, Total fertility rate, Neonatal mortality, under-5 mortality, Health finance= World Development Indicators, the World Bank (Accessed on Aug 2021); Maternal mortality= UNICEF (Sep 2019); Antenatal care, Immunization, Nutrition, Health service provision,= OECD/The World Bank (2020), Health at a Glance: Latin America and the Caribbean 2020; COVID-19 related indicators= Our World in Data (Accessed on Jan 2022)

| Health                                  |   |
|---|---|
| Leadership/ Governance                  | Responsible Agency: Secretaria de Salud / Ministry of Health<br><a href="https://www.gob.mx/salud/en">https://www.gob.mx/salud/en</a> ; Decentralized<br>Major Relevant Policies: Programa Sectorial de Salud 2020-2024, Programa Sectorial Derivado del Plan Nacional de Desarrollo 2019-2024  |
| Service Providing System                | Public sector could not provide variety of treatment methods due to old facility and equipment. The service delivery system is vertically divided and fragmented. Private sector has been rapidly developed to advanced services with equipment which is not available in the public sector.  |
| Health Finance                          | Formal sector health insurance and subsidization for the poor cover 85% of population.  |
| Human Resource for Health               | Specialized doctors and nurses are not sufficient.  |
| IT/ Digital Health                      | Some applications have been developed under National Basic Health Information System (SINBA). Some are introduced both public and private sectors to mutual data sharing. Electronic medical record has been introduced.<br>In 2020, Ministry of Health in collaboration with SofiaSalud SA ( <a href="https://www.sofiasalud.com/">https://www.sofiasalud.com/</a> , established in 2018 in Mexico) launched video consultation by specialized doctors.  |
| Drugs/ Medical Equipment                | Advanced medical equipment is not sufficient to respond the recent medical needs.   |
| Priority                                | Obesity, noncommunicable diseases, reproductive health, mental health<br>Elimination of inequity in service access and health outcome   |
| Communicable Disease Emergency Response | Core capacities required in IHR has been developed.<br>The Dr. Hideyo Noguchi Regional Research Centre in the Autonomous University of Yucatan is a major research institute in southern Mexico. It develops health researches, provides trainings on health and social sciences, mainly focusing on neglected tropical diseases.<br>The National Laboratory for Epidemiological Diagnostic and Reference (InDRE) leads a network of state laboratories to conduct The National Epidemiological Surveillance System (SINAVE). |
| Major Development Partners              | PAHO/WHO: Mexico provides technical and financial assistance to neighboring countries. Mexico is proactive to provide assistance to neighboring countries under regional frameworks such as Mesoamerican System of Public Health, Iberoamerican Community, the Pacific Alliance, EU, and Asia-Pacific Economic Cooperation (APEC). Also, Mexico has been supporting migrants' health in collaboration with US and Canada.   |
| Nutrition                               |   |
| Institutional Arrangement               | (No information)  |
| Major Relevant Policies                 | (No information)  |
| Human Resource for Health               | (No information)  |

Source: Survey Team with reference to WHO Country Cooperation Strategy for Mexico at a glance, May 2016, Institute for Health Metrics and Evaluation, County Profile, North American Observatory on Health Systems and Policies, Health System in Transition - Mexico, 2020, WHO, Global atlas of medical devices, 2017, Dumonteil E, Rosado-Vallado M, Zavala-Castro JE (2013) Pioneering Neglected Disease Research in Southern Mexico at the "Dr. Hideyo Noguchi" Regional Research Center. PLoS Negl Trop Dis 7(11), Dan Morgenstern-Kaplan, MD, et al., An App-Based Telemedicine Program for Primary Care and Specialist Video Consultations During the COVID-19 Pandemic in Mexico, 2021, and WHO, Nutrition Landscape Information System (NLIS)



## 16.3.2 Education

| Overview  |  |  |            |            |            |         |                  |    |    |    |                   |    |    |    |                           |    |    |    |
|---|--|--|------------|------------|------------|---------|------------------|----|----|----|-------------------|----|----|----|---------------------------|----|----|----|
| Number of children  | Education level  | Preschool      primary      Lower secondary      Upper secondary   |            |            |            |         |                  |    |    |    |                   |    |    |    |                           |    |    |    |
|   | 2018   | 4,899,899      14,061,377      8,519,794      5,640,841  |            |            |            |         |                  |    |    |    |                   |    |    |    |                           |    |    |    |
| Source: Institute for Statistics (UIS), UNESCO Bureau of Statistics |  |  |            |            |            |         |                  |    |    |    |                   |    |    |    |                           |    |    |    |
| Government authority  | Secretaria de Educación Publica  |  |            |            |            |         |                  |    |    |    |                   |    |    |    |                           |    |    |    |
| Education indicator   | Net enrollment rate: primary education 99.3%, lower secondary 92.2%, upper secondary 73.9% (2018)<br>Primary education completion rate 102.3% (2018), out-of-school children rate 0.7% (2018), public education budget GDP ratio 4.5% (2017) Source: UIS   |  |            |            |            |         |                  |    |    |    |                   |    |    |    |                           |    |    |    |
| Learning achievement survey   | <p>PISA (2018) 7th grade (equivalent to 1st grade of lower secondary school) Reading average 420 points, Math average 409 points, Science average 419 points. It is lower than OECD country average (489 points). 45% of students in reading comprehension, 56% in mathematics, and 47% in science have not reached level 2 where they "understand the basics".</p> <p>3rd Regional Education Quality Survey (TERCE, 2013) 3rd grade science 740.71 points (4th out of 15 countries), reading comprehension 718.41 points (5th out of 15 countries), 6th grade science 768.1 points (2nd out of 15 countries), Reading comprehension 734.51 points (4th out of 15 countries), science 731.96 points (4th out of 15 countries). It is higher than an average of 700 points in Latin American countries.</p> |  |            |            |            |         |                  |    |    |    |                   |    |    |    |                           |    |    |    |
| Impact of COVID-19  |  |  |            |            |            |         |                  |    |    |    |                   |    |    |    |                           |    |    |    |
| School closure / reopening  | From March 11, 2020 to February 2, 2021, 180 days of complete closure, the fourth longest of the 23 Caribbean countries in Central America. Classes were held in a remote style from March to August 2021 and in a hybrid style from September.  |  |            |            |            |         |                  |    |    |    |                   |    |    |    |                           |    |    |    |
| COVID-19 measures   | COVID-19 10 Proposals for Education in Crisis  |  |            |            |            |         |                  |    |    |    |                   |    |    |    |                           |    |    |    |
| Distance education  | Implementation status  | In 2020/2021, distance education was conducted using the Internet, TV and radio through the "Learn at Home II" program. Classes are distributed on the education channel Edusat in rural areas. For indigenous communities, adult education national institutions and indigenous national institutions broadcast radio program in 22 indigenous languages. Distribution of teaching materials such as learning guides and textbooks to areas where TV does not reach (6% of the student population). After the start of distance education, more than 38 million people have studied at home. 8.5 million people watch TV. In addition, the educational program "Telesecundaria", which has been implemented since the latter half of the 1960s, is aimed at rural secondary schools (communities with a population of 2,500 or less) and carries out activities in line with the curriculum through television broadcasting and individual guidance throughout the year. Distance Education Readiness Index published by UNICEF is Level 3 "Distance education systems are considered to be relatively resilient, but there are serious concerns about potential learning losses and the ability to continue equivalent learning if face-to-face lessons are interrupted. "   |            |            |            |         |                  |    |    |    |                   |    |    |    |                           |    |    |    |
|   | Access   | <p>In a household survey conducted by Ibero-American University and UNICEF in May 2020, 60% of households with children said they had accessed the Ministry of Education's "Learn at Home" program. Only 54% of the lowest socio-economic households who participated in the survey used it and said they were not satisfied with the provision of distance learning. Reasons for this are lack of access to the Internet and computers, lack of knowledge required for virtual learning, and lack of textbooks.</p> <p>School-aged children / students who can connect to the Internet at home (%) (2018)</p> <table border="1"> <thead> <tr> <th></th> <th>Rural area</th> <th>Urban area</th> <th>Overall</th> </tr> </thead> <tbody> <tr> <td>Whole school age</td> <td>11</td> <td>52</td> <td>41</td> </tr> <tr> <td>Primary Education</td> <td>10</td> <td>47</td> <td>37</td> </tr> <tr> <td>Lower secondary education</td> <td>12</td> <td>54</td> <td>43</td> </tr> </tbody> </table> <p>Source: UNICEF Global database on school-age digital connectivity</p> <p>In the UNICEF COVID-19 survey, 78.6% of parents said it was difficult to study at home during school closures. The reasons are lack of infrastructure, lack of teacher support (31.4%), inability to concentrate children (21.1%), lack of parental knowledge (17.1%), and lack of textbooks and other teaching materials (14.9%). Internet access rate for educational purpose at schools is 38.88 % in primary, 54.81 % in lower secondary and 50.75 % in upper secondary schools.</p> |            | Rural area | Urban area | Overall | Whole school age | 11 | 52 | 41 | Primary Education | 10 | 47 | 37 | Lower secondary education | 12 | 54 | 43 |
|   |  | Rural area   | Urban area | Overall    |            |         |                  |    |    |    |                   |    |    |    |                           |    |    |    |
| Whole school age  | 11   | 52   | 41         |            |            |         |                  |    |    |    |                   |    |    |    |                           |    |    |    |
| Primary Education   | 10   | 47   | 37         |            |            |         |                  |    |    |    |                   |    |    |    |                           |    |    |    |
| Lower secondary education   | 12   | 54   | 43         |            |            |         |                  |    |    |    |                   |    |    |    |                           |    |    |    |
| Teacher training  | Conducted teacher training by online (audiovisual materials, modules, exercise guides, virtual classes). The Ministry of Education has set up a blog "Entre Docentes" for teachers as a place to share information on proposals, articles,   |  |            |            |            |         |                  |    |    |    |                   |    |    |    |                           |    |    |    |

|  |  |   |                             |                |                      |
|--|--|---|-----------------------------|----------------|----------------------|
|  |  | research, ideas, opinions, and current affairs news regarding continuous education and professional development of teachers in basic education and secondary education. Internet access rate for educational purposes at school: 38.88% for primary school, 54.81% for secondary school, 50.75% for secondary school (UNESCO) |                             |                |                      |
| School hygiene   | Infection control measures   | COVID-19 precautions for the national education sector  |                             |                |                      |
|  | Facility maintenance   | 2019  | Basic water supply facility | Toilet         | Hand-wash facilities |
|  |  | Urban area  | Undeveloped 3%              | Undeveloped 2% | ...                  |
|  |  | Rural area  | Undeveloped 23%             | ...            | ...                  |
|  |  | Whole country   | Undeveloped 15%             | 74%            | Undeveloped 17%      |
|  |  | Primary Education   | Undeveloped 17%             | 74%            | ...                  |
| Secondary Education  | 49%  | 80%   | 82%                         |                |                      |
| Source: World Bank / UNICEF Survey <a href="https://washdata.org/">https://washdata.org/</a> |  |   |                             |                |                      |
| School lunch / nutrition   | 50% reduction during school closure  |   |                             |                |                      |
| Countermeasures for vulnerable people  | Developed and distributed teaching materials such as audio, sign language, and Braille for indigenous languages, visually impaired, and hearing-impaired people.<br>Conducting radio courses in 22 indigenous languages  |   |                             |                |                      |
| Support for donors, etc.   | UNICEF: 1) Home study program, 2) Health in Your Hands hygiene training, delivery of consumables, establishment of a hand wash facility at school, distribution of solid hand soap for use in schools and health centers, delivery of health and hygiene message to 1.2 million indigenous people. |   |                             |                |                      |

Source: Survey Team

### 16.3.3 Agriculture / rural development

|   |   |            |            |            |            |            |
|---|---|------------|------------|------------|------------|------------|
| Urban / rural population ratio                    | 80.2% / 19.8% (FAOSTAT 2018)  |            |            |            |            |            |
| Agricultural land area                            | 96,106,000 ha (FAOSTAT 2019) 1)   |            |            |            |            |            |
| Agricultural sector employment                    | 12.4% of all employment (male / female ratio: 88.5% / 11.5%) (FAOSTAT 2019) 2)  |            |            |            |            |            |
| Agricultural GDP                                  | 3.9% of total GDP (World Bank 2020)   |            |            |            |            |            |
| Of the agricultural sector Value added amount     | 41,845,660.68 thousand dollars (World Bank 2020) 3) * Statistics include forestry   |            |            |            |            |            |
| Agricultural sector expenditure ratio             | Ratio of agricultural fiscal expenditure to national budget (%) 4)  |            |            |            |            |            |
|   | 2018  | 2019       | 2020       |            |            |            |
|   | 1.79  | 1.28       | 1.00       |            |            |            |
| Agricultural sector import / export balance       | Trade Balance (USD1,000 FAOSTAT) 5)   |            |            |            |            |            |
|   |   | 2015       | 2016       | 2017       | 2018       | 2019       |
|   | export  | 25,728,757 | 27,950,098 | 31,221,369 | 33,084,780 | 34,350,163 |
|   | Import  | 24,074,263 | 24,034,369 | 25,301,485 | 26,387,495 | 25,784,233 |
|   | Balance of payments   | 1,654,494  | 3,915,729  | 5,919,884  | 6,697,285  | 8,565,930  |
| Agricultural development Policy / plan / strategy | <p>The Sectoral Program for Agricultural and Rural Development 2020-2024<sup>6</sup>) established priorities and strategies for agricultural and rural development and concrete action plans for the five-year period from 2020. It aims at the prosperity of the country by utilizing the skills of agricultural workers and female entrepreneurs. In order to guarantee "the right of the people to have sufficient access to nutritious and high-quality foods" specified in Article 4.7) of the Constitution, we are advocating the achievement of food self-sufficiency, and in addition, the United Nations 2030 Agenda. In order to responsibly carry out sustainable agriculture in accordance with the development goals of, the following three achievement goals have been set.</p> <p>The first purpose is to achieve food self-sufficiency. In recent years, the national food self-sufficiency rate has decreased to 77.8% (2018), and to correct this, we have set a target to raise it to 86% by 2024. The National Development Plan (PND) 2019-2024<sup>8</sup>) stipulates that corn, beans, and rice must be self-sufficient as strategic items for food security. Immediate challenges are for small and medium-sized producers with limited market access due to lack of cheap and high quality materials, immature production technology, lack of union organization, lack of competitiveness with imported products. Strengthening support is needed. As a countermeasure, the government is proposing a mechanism that supports a system that promotes basic grain production without an intermediary and can provide it at a competitive price. It also selects priority</p> |            |            |            |            |            |

|                    |   |
|--------------------|---|
|                    | <p>areas for the country and takes direct support measures to facilitate access to food, textiles, biofuels, agricultural industry inputs, high-tech machinery, equipment, infrastructure and financing.</p> <p>The second objective focuses on producers who have historically been excluded from rural and coastal production activities, especially for young indigenous women, to protect the rights of rural women and gender-blind. It is to promote free. Employment of small-scale producers in rural and coastal areas, improved income, and distribution of "basic food baskets" are defined as priority strategies.</p> <p>The final goal is to address the problems of degraded agricultural soils, aquifers, and climatic and environmental risks exacerbated by the decline of biodiversity and overfishing of natural resources. Climate change affects the deterioration of the natural environment and food productivity, reducing vulnerability to the country's stable production system and strengthening the adaptability of the agriculture and aquaculture sectors. The importance of adhering to food security without degrading the water footprint and natural resources of these sectors is mentioned.</p>   |
| Impact of COVID-19 | <p>Extreme droughts, economic paralysis, reduced consumption, and economic revitalization in multiple states, according to a report (2020) 9) from the Center for Sustainable Rural Development and Food Sovereignty (CEDRSSA) In addition to the lack of lending policies needed to grow, pandemics have impacted food production by significantly reducing production of key crops such as beans, corn, soybeans, sorghum, and other crops, including fruits and vegetables. Giving. In states such as Guanajuato, the coronavirus caused up to \$ 44 million in damage, with pig farmers declining by up to 15%.</p> <p>According to a report (2021) 10) by researchers at the International Center for Corn and Wheat Improvement (CIMMYT), pandemics cause problems such as reduced mobility, closure of public and private spaces, or border restrictions, especially small and medium-sized. The impact of COVID-19 sanitary measures is significant because the entrepreneurial farming system of corn relies heavily on seasonal labor and local markets. At the local level, there are serious obstacles to the acquisition of inputs, especially fertilizers, seeds, veterinary drugs, animal feeds and other inputs, which become over-demanded and prices soar as soon as they become available. It was seen.</p> <p>A report (2020) 11) by COBI, a citizen group engaged in marine conservation and sustainable fisheries management activities, suggests that the Mexican fishing sector lacks government support. There is. Forty-eight percent of fishermen (interview respondents) have stopped fishing after the lockdown in March 2020. Eight months later, 91% of fishermen have returned (of which 21% have fully recovered), but 8% have not been able to reactivate. In addition, it has been confirmed that exploitation has been escalated since the beginning of the pandemic, such as being beaten by market participants at low prices.</p>  |
| Source / reference | <ol style="list-style-type: none"> <li>1) FAOSTAT-Land, Input and Sustainability-Land Use-Area-Agriculture (<a href="https://www.fao.org/faostat/en/#data/RL">https://www.fao.org/faostat/en/#data/RL</a>)</li> <li>2) FAOSTAT- Share of employment in agriculture (% of total employment) &amp; Share of female employment in agriculture (% of employment in agriculture) (<a href="https://www.fao.org/faostat/en/#data/OE">https://www.fao.org/faostat/en/#data/OE</a>)</li> <li>3) <a href="https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=MX&amp;view=chart">https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=MX&amp;view=chart</a></li> <li>4) FAOSTAT-Government Expenditure-Share of Total Expenditure-Central Government (<a href="https://www.fao.org/faostat/en/#data/IG">https://www.fao.org/faostat/en/#data/IG</a>)</li> <li>5) FAOSTAT-Trade-Crops and livestock products-Import / Export Value-Agricultural Products (<a href="https://www.fao.org/faostat/en/#data/TCL">https://www.fao.org/faostat/en/#data/TCL</a>)</li> <li>6) Programa Sectorial de Agricultura y Desarrollo Rural 2020-2024 (<a href="https://www.gob.mx/agricultura/documentos/programa-sectorial-de-agricultura-y-desarrollo-rural-2020-2024">https://www.gob.mx/agricultura/documentos/programa-sectorial-de-agricultura-y-desarrollo-rural-2020-2024</a>)</li> <li>7) Artículo 4o.- (<a href="http://www.ordenjuridico.gob.mx/Constitucion/articulos/4.pdf">http://www.ordenjuridico.gob.mx/Constitucion/articulos/4.pdf</a>)</li> <li>8) Plan Nacional de Desarrollo 2019-2024 (<a href="https://observatorioplanificacion.cepal.org/sites/default/files/plan/files/Plan%20Nacional%20de%20Desarrollo%20de%20M%C3%A9xico.pdf">https://observatorioplanificacion.cepal.org/sites/default/files/plan/files/Plan%20Nacional%20de%20Desarrollo%20de%20M%C3%A9xico.pdf</a>)</li> <li>9) Situación del sector agropecuario en México, 2020, Centro de estudios para el desarrollo rural sustentable y la soberanía alimentaria (CEDRSSA) (<a href="http://www.cedrssa.gob.mx/files/b/13/22Situacion_Sector_Agropecuario_Me%CC%81xico.pdf">http://www.cedrssa.gob.mx/files/b/13/22Situacion_Sector_Agropecuario_Me%CC%81xico.pdf</a>)</li> <li>10) Immediate impact of COVID-19 pandemic on farming systems in Central America and Mexico, 2021 (<a href="https://www.sciencedirect.com/science/article/pii/S0308521X21001311">https://www.sciencedirect.com/science/article/pii/S0308521X21001311</a>)</li> <li>11) Principles for the New Normal in small-scale fisheries. 2020, Comunidad y Biodiversidad (COBI) (<a href="https://cobi.org.mx/wp-content/uploads/2020/12/COBI-COVID-19-New-Normal_7dic2020.pdf">https://cobi.org.mx/wp-content/uploads/2020/12/COBI-COVID-19-New-Normal_7dic2020.pdf</a>)</li> </ol> |

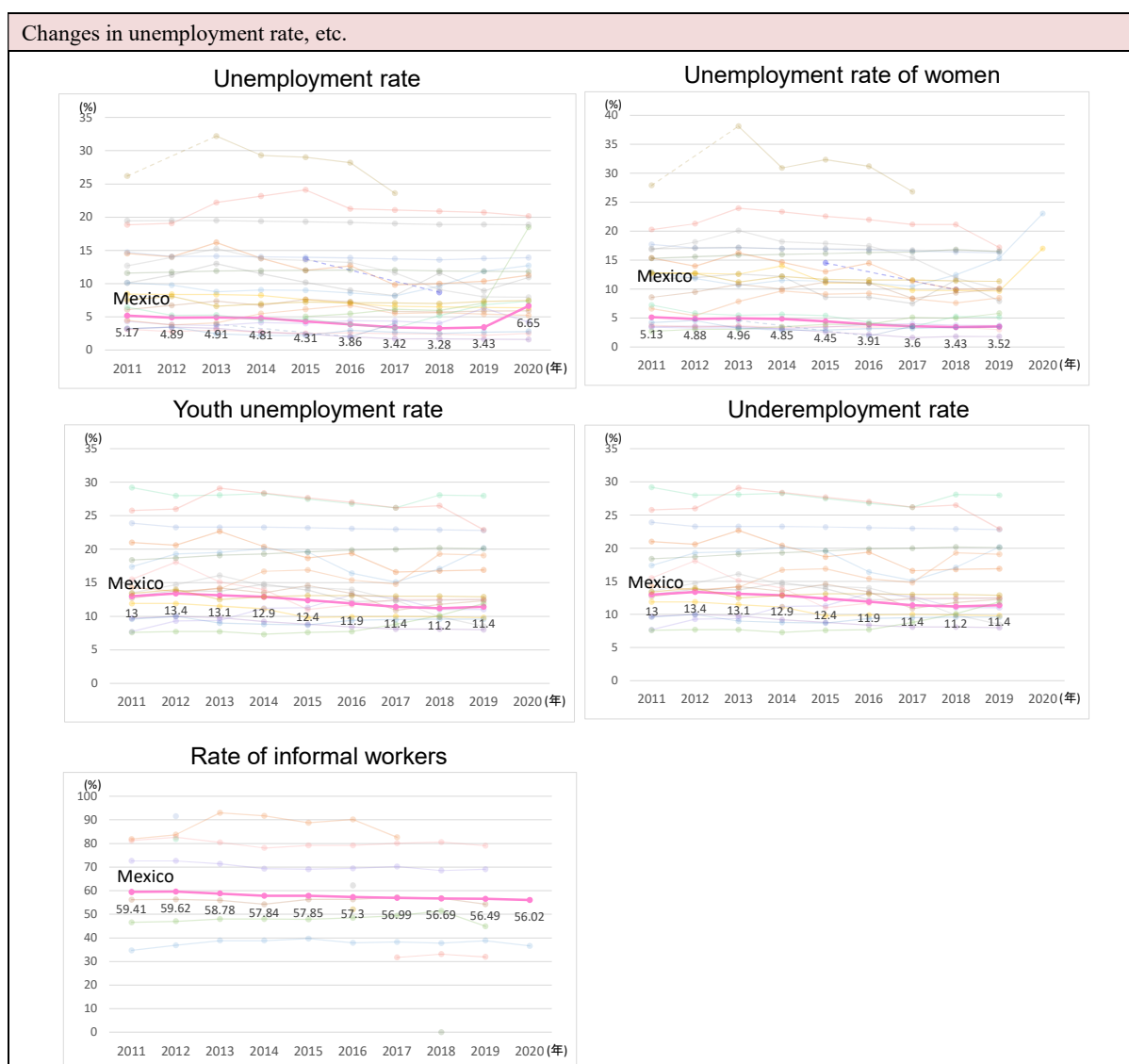
### 16.3.4 Private sector

Mexico is a prominent economic power in the region, whose GDP is about 14 times that of the Dominican Republic. On the other hand, the current situation is that GDP per capita is not very high. The very low minimum wage (19th place) could be one of the reasons why the unemployment rate is extremely low. Also, the informal worker rate reaches 56.49%.

|              | Index                      | Value  | Ranking                 | Year | Source     |
|--------------|----------------------------|--------|-------------------------|------|------------|
| Productivity | GDP per capita (USD)       | 8,347  | 10 (Among 22 countries) | 2020 | World Bank |
|              | GDP per worker (USD)       | 45,024 | 5 (Among 18 countries)  | 2019 | World Bank |
| Employment   | Minimum wage (USD / month) | 100    | 19 (Among 23 countries) | 2020 | JETRO      |
|              | Unemployment rate          | 3.43   | 4 (Among 22 countries)  | 2019 | Statista   |
|              | Female unemployment rate   | 3.52   | 4 (Among 22 countries)  | 2019 | The Global |

|  |                         |       |                        |      |          |
|--|-------------------------|-------|------------------------|------|----------|
|  |                         |       |                        |      | Economy  |
|  | Youth unemployment rate | 7.07  | 5 (Among 22 countries) | 2019 | Statista |
|  | Underemployment rate    | 11.4  | 6 (Among 18 countries) | 2019 | ILO      |
|  | Informal worker rate    | 56.49 | 6 (Among 12 countries) | 2019 | INEGI    |

Source: Described in the table



Source: World Bank, ILO, The Global Economy, etc.

### 16.3.5 Environment / disaster prevention

|             | item   | data  | remarks                          |
|-------------|--|---|----------------------------------|
| environment | Environmental agency                                     | Secretaría de Medio Ambiente y Recursos Naturales   |                                  |
|             | Waste-related organizations                              | Municipalities  |                                  |
|             | Environmental Budget (USD)                               | 2019: 1,326,022,977<br>2020: 1,493,472,539<br>2021: 1,567,409,617<br>Three-year average:<br>1,462,301,711 | Average: 1st out of 23 countries |
|             | Environmental budget per capita (2019-2021 average, USD) | 11.3  | 9th out of 23 countries          |
|             | Budget ratio to national budget (2019)                   | 0.46%   | 8th out of 23 countries          |
|             | Donor support status                                     | 11 cases  | As of May 2021                   |
|             | Renewable energy power generation (GWh) (2019)           | 385   | IRENA, 2021                      |

|                     |  |   |                          |
|---------------------|--|---|--------------------------|
|                     | Geothermal power generation capacity (MWe)         | 2020: 1,005.80<br>2025 Forecast: 1,061.00   | WGC, 2020                |
| Disaster prevention | Disaster prevention organization                   | National Center for Disaster Prevention (CENAPRED)                                |                          |
|                     | Donor support status                               | 3 cases   | As of May 2021           |
|                     | Number of natural disasters (2010-2020)            | 32 cases<br>Major disasters: floods, earthquakes, landslides, droughts, wildfires |                          |
|                     | Number of victims (persons) per 100,000 population | 4,453 people  | 11th out of 23 countries |

Source: Survey Team

### 16.3.6 Governance and citizen security

| Item  | Overview  |           |         |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
|---|---|-----------|---------|----------------------------|----------------------------|--------------------------|-----------------------------|------|-----|------|-----|--------|------|-----|------|-----|------|-----|------|-----|---|-----------------------------|------|-----|------|-----|--------|------|-----|------|-----|------|-----|------|-----|--------------------------|-----------------------------|------|-----|------|-----|--------|------|-----|------|-----|------|-----|------|-----|--------------------|-----------------------------|------|-----|------|-----|--------|------|-----|------|-----|------|-----|------|-----|-------------|-----------------------------|------|-----|------|-----|--------|------|-----|------|-----|------|-----|------|-----|-----------------------|-----------------------------|------|-----|------|-----|--------|------|-----|------|-----|------|-----|------|-----|
| Political system                                      | Presidential Federal Republic   |           |         |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
| Election system                                       | The president is elected by a simple majority vote. The term of office is 6 years and cannot be re-elected.   |           |         |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
| Legislative system                                    | Bicameral National Assembly (Federal Assembly)  |           |         |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
| Most recent / next legislative election               | Senate: July 1, 2018 (next time scheduled for July 2024)<br>House of Representatives: June 6, 2021 (Next time scheduled for July 2024)  |           |         |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
| Appointment of judicial system / judge                | After being appointed by the President of the Republic, the Supreme Court is approved in the Senate with more than two-thirds of the votes cast by the attending members. After being appointed by the Supreme Court, senior judges of the Election and District Courts are approved in the Senate with more than two-thirds of the votes cast by the attending members. The President of the High Court is elected from among the members of the court.  |           |         |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
| Level of political stability and absence of violence  | Low   |           |         |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
| "Worldwide Governance Indicators"                     | <p>Mexico has adopted electoral democracy since 2000, and there are frequent changes of political parties at both the federal and state levels. However, the rule of law is not well established and citizens do not enjoy political rights or civil liberties. Violence due to organized crime, corruption within the government, infringement of human rights by national and non-state actors, and rampant impunity of crime are prominent governance issues (Freedom House 2021).</p> <table border="1"> <caption>Worldwide Governance Indicators Percentile Rank (0 to 100)</caption> <thead> <tr> <th>Indicator</th> <th>Country</th> <th>Year</th> <th>Percentile Rank (0 to 100)</th> </tr> </thead> <tbody> <tr> <td rowspan="6">Voice and Accountability</td> <td rowspan="2">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~60</td> </tr> <tr> <td>2019</td> <td>~60</td> </tr> <tr> <td rowspan="4">Mexico</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~45</td> </tr> <tr> <td>2020</td> <td>~45</td> </tr> <tr> <td>2020</td> <td>~45</td> </tr> <tr> <td rowspan="6">Political Stability and Absence of Violence/Terrorism</td> <td rowspan="2">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td rowspan="4">Mexico</td> <td>2010</td> <td>~35</td> </tr> <tr> <td>2019</td> <td>~25</td> </tr> <tr> <td>2020</td> <td>~25</td> </tr> <tr> <td>2020</td> <td>~25</td> </tr> <tr> <td rowspan="6">Government Effectiveness</td> <td rowspan="2">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td rowspan="4">Mexico</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~45</td> </tr> <tr> <td>2020</td> <td>~45</td> </tr> <tr> <td>2020</td> <td>~45</td> </tr> <tr> <td rowspan="6">Regulatory Quality</td> <td rowspan="2">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td rowspan="4">Mexico</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~45</td> </tr> <tr> <td>2020</td> <td>~45</td> </tr> <tr> <td>2020</td> <td>~45</td> </tr> <tr> <td rowspan="6">Rule of Law</td> <td rowspan="2">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td rowspan="4">Mexico</td> <td>2010</td> <td>~45</td> </tr> <tr> <td>2019</td> <td>~35</td> </tr> <tr> <td>2020</td> <td>~35</td> </tr> <tr> <td>2020</td> <td>~35</td> </tr> <tr> <td rowspan="6">Control of Corruption</td> <td rowspan="2">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td rowspan="4">Mexico</td> <td>2010</td> <td>~45</td> </tr> <tr> <td>2019</td> <td>~35</td> </tr> <tr> <td>2020</td> <td>~35</td> </tr> <tr> <td>2020</td> <td>~35</td> </tr> </tbody> </table> | Indicator | Country | Year                       | Percentile Rank (0 to 100) | Voice and Accountability | * Latin America & Caribbean | 2010 | ~60 | 2019 | ~60 | Mexico | 2010 | ~55 | 2019 | ~45 | 2020 | ~45 | 2020 | ~45 | Political Stability and Absence of Violence/Terrorism | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | Mexico | 2010 | ~35 | 2019 | ~25 | 2020 | ~25 | 2020 | ~25 | Government Effectiveness | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | Mexico | 2010 | ~55 | 2019 | ~45 | 2020 | ~45 | 2020 | ~45 | Regulatory Quality | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | Mexico | 2010 | ~55 | 2019 | ~45 | 2020 | ~45 | 2020 | ~45 | Rule of Law | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | Mexico | 2010 | ~45 | 2019 | ~35 | 2020 | ~35 | 2020 | ~35 | Control of Corruption | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | Mexico | 2010 | ~45 | 2019 | ~35 | 2020 | ~35 | 2020 | ~35 |
|   | Indicator   | Country   | Year    | Percentile Rank (0 to 100) |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
| Voice and Accountability                              | * Latin America & Caribbean   | 2010      | ~60     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
|   |   | 2019      | ~60     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
|   | Mexico  | 2010      | ~55     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
|   |   | 2019      | ~45     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
|   |   | 2020      | ~45     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
|   |   | 2020      | ~45     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
| Political Stability and Absence of Violence/Terrorism | * Latin America & Caribbean   | 2010      | ~55     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
|   |   | 2019      | ~55     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
|   | Mexico  | 2010      | ~35     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
|   |   | 2019      | ~25     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
|   |   | 2020      | ~25     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
|   |   | 2020      | ~25     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
| Government Effectiveness                              | * Latin America & Caribbean   | 2010      | ~55     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
|   |   | 2019      | ~55     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
|   | Mexico  | 2010      | ~55     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
|   |   | 2019      | ~45     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
|   |   | 2020      | ~45     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
|   |   | 2020      | ~45     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
| Regulatory Quality                                    | * Latin America & Caribbean   | 2010      | ~55     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
|   |   | 2019      | ~55     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
|   | Mexico  | 2010      | ~55     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
|   |   | 2019      | ~45     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
|   |   | 2020      | ~45     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
|   |   | 2020      | ~45     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
| Rule of Law   | * Latin America & Caribbean   | 2010      | ~55     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
|   |   | 2019      | ~55     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
|   | Mexico  | 2010      | ~45     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
|   |   | 2019      | ~35     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
|   |   | 2020      | ~35     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
|   |   | 2020      | ~35     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
| Control of Corruption                                 | * Latin America & Caribbean   | 2010      | ~55     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
|   |   | 2019      | ~55     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
|   | Mexico  | 2010      | ~45     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
|   |   | 2019      | ~35     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
|   |   | 2020      | ~35     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
|   |   | 2020      | ~35     |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |
| Global freedom status                                 | 61/100 points (citizen rights: 34/40 points, political rights: 27/60 points)<br>Classified as "free country" (Freedom House 2021)   |           |         |                            |                            |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |   |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                          |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                    |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |             |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |                       |                             |      |     |      |     |        |      |     |      |     |      |     |      |     |

|                                   |   |
|-----------------------------------|---|
| Corruption Perception Index (CPI) | 124/180th place, 31/100 points (Transparency International 2020)  |
| E-government development index    | It ranks high among the Caribbean countries in Central America. In particular, it ranks first in the region in terms of online service indicators. 10.81% of the people (more than 10.42 million people) are not given a national ID, which is the largest number among Central American countries. |
| Rule of law                       | According to WGI, the level of "rule of law" is low.  |
| Citizen security                  | The homicide rate shows the same tendency as the Central American average, which is higher than the world average. The homicide rate in 2018 was 29.1 / 100,000 (28.1 in Central America and 6.2 in the world in the same year) (UNODC 2021).   |

Source: Survey Team

### 16.3.7 DX / Innovation

|                                 |   |   |
|---------------------------------|---|---|
| Basic indicators and statistics | E-Government Ranking 1): 61st                   | Radar chart of e-government ranking<br> |
|                                 | Mobile connection index 2): 67.6                |   |
|                                 | Network Infrastructure Index: 65.9              |   |
|                                 | Internet user rate 71.0                         |   |
|                                 | Mobile connection rate 89.1                     |   |
|                                 | Fixed broadband rate 15.2                       |   |
|                                 | Increase rate of Internet users 4.0 (2021/2020) |   |

#### Communication network

The telecommunications sector market 3) is still dominated by two companies, Telmex (America Móvil) and Grupo Televisa (Televisa), with landlines (53.2%, 23.1%) and fixed broadband (50.1%, 24.3%). It is in a state of being. In 2013, the government announced a constitutional amendment project to end this quasi-monopoly and support competition for video, telephone and broadband internet<sup>4</sup>), but still significantly reduces the leadership of Telcel and Telmex (both from America Móvil). I haven't been able to get it. However, due to the new entry of AT & T and MVNO, Telcel (America Móvil) has 62.4%, Movistar (Telefónica) 20.6%, and AT & T 15.3%, which is a slight competitive principle in the mobile market. According to the National Telecommunications Authority (IFT), the deployment of 5G infrastructure was scheduled to begin in 2021, but it has been delayed due to the effects of COVID-19<sup>5</sup>), and in addition to 5G in Mexico. There are also economic challenges to major infrastructure, such as low investment in telecommunications in recent years (cumulative investment per capita of 395 USD million for the 10 years from 2008) <sup>6</sup>). By the end of 2020, Mexico will allocate a 700 MHz spectrum to International Mobile Communications (IMT), but additional frequency bands will need to be allocated to the entire spectrum to meet the desired speed, coverage, and delay provided by 5G. <sup>be</sup>.

#### National Strategy for Digital Transformation

The National Digital Strategy (EDN) <sup>7</sup>) focuses on promoting the use and development of ICT and contributing to the social welfare of the people, with a humanitarian vision, tight finances and transparency in using ICT technology. It states that it will strictly adhere to the principles of gender and popular sovereignty. In achieving these objectives, the highest priority is to create an environment where all citizens can access the Internet fairly, and the importance of eliminating the digital divide, which is seen especially in the suburbs of urban areas and rural areas in remote areas, is recognized<sup>8</sup>). ing. Access to and use of ICT is a means to strengthen ties between the government and the general public and strengthen economic activities, and is one of the priority projects in the economic measures of the National Development Plan 2019-2024 (PND) <sup>9</sup>). It is built in.

However, this strategy has ambiguous definitions of actions, execution mechanisms, performance indicators, and duration, specific technologies and business models (cloud computing, artificial intelligence, e-commerce) and those in Mexico's value chain and production processes. There is no conception about the role of the cloud, and there is no mention of themes such as cyber security, data protection, literacy, and corporate digital transformation <sup>10</sup>).

#### Characteristic efforts

To mitigate the effects of COVID-19, the Ministry of Public Education has implemented a homeschooling program<sup>11</sup>) to enable school curriculum during lockdown. Educational content is available online and through public television. It spends 8.8 USD million, which is 88% of the education budget, to implement this program <sup>12</sup>).

Mexico has established the Better than Cash Alliance <sup>13</sup>) through multilateral cooperation with Colombia, Paraguay, Peru, and other countries around the world. The partnership aims to accelerate the transition from cash to digital payments to reduce poverty and promote inclusive growth.

It also works with the European Union and plays a major role in planning to promote high performance computing (HPC) <sup>14</sup>). A comprehensive system with HPC's high-speed analysis capabilities, such as fraud detection in the finance service industry and electronic medical record management system in the medical sector, is expected to be used in various fields of science, business, and engineering.

#### source

117. E-Gov-Index: a composite indicator that consists of three indexes (Online Service Index, Telecommunication Infrastructure Index and Human Capital Index), which are equally weighted. It ranges from 0 to 1, with 1 being the most developed.



|      |   |
|------|---|
| 118. | Mobile Connectivity Index: an input index developed by GSMA to measure the performance against the four key enablers of mobile internet adoption – infrastructure, affordability, consumer readiness and content. ( <a href="https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2016/06/Mobile-Connectivity-Launch-Report.pdf">https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2016/06/Mobile-Connectivity-Launch-Report.pdf</a> ) |
| 119. | PANORAMA DE MERCADO – MÉXICO<br><a href="https://www.telesemana.com/panorama-de-mercado/mexico/">https://www.telesemana.com/panorama-de-mercado/mexico/</a>   |
| 120. | México propone ley para terminar con monopolios en telecomunicaciones<br><a href="https://www.estrategiaynegocios.net/lasclavesdeldia/462803-330/mexico-propone-ley-para-terminar-con-monopolios-en-telecomunicaciones">https://www.estrategiaynegocios.net/lasclavesdeldia/462803-330/mexico-propone-ley-para-terminar-con-monopolios-en-telecomunicaciones</a>  |
| 121. | Stephanie Chevalier, 5G in Mexico – statistics & facts<br><a href="https://www.statista.com/topics/8158/5g-in-mexico/">https://www.statista.com/topics/8158/5g-in-mexico/</a>   |
| 122. | Digital Transformation: Infrastructure Sharing in Latin America and the Caribbean<br><a href="https://publications.iadb.org/publications/english/document/Digital-Transformation-Infrastructure-Sharing-in-Latin-America-and-the-Caribbean.pdf">https://publications.iadb.org/publications/english/document/Digital-Transformation-Infrastructure-Sharing-in-Latin-America-and-the-Caribbean.pdf</a>  |
| 123. | Estrategia Digital Nacional 2021-2024<br><a href="https://dof.gob.mx/nota_detalle_popup.php?codigo=5628886">https://dof.gob.mx/nota_detalle_popup.php?codigo=5628886</a>  |
| 124. | Marlen Martínez Domínguez, Digital inequality in Mexico: an analysis of the reasons for non-access and non-use of the internet<br><a href="http://www.scielo.org.mx/scielo.php?script=sci_arttext&amp;pid=S2007-36072020000200004">http://www.scielo.org.mx/scielo.php?script=sci_arttext&amp;pid=S2007-36072020000200004</a>   |
| 125. | PLAN-NACIONAL-DE-DESARROLLO-2019-2024<br><a href="https://lopezobrador.org.mx/wp-content/uploads/2019/05/PLAN-NACIONAL-DE-DESARROLLO-2019-2024.pdf">https://lopezobrador.org.mx/wp-content/uploads/2019/05/PLAN-NACIONAL-DE-DESARROLLO-2019-2024.pdf</a>  |
| 126. | México y su Estrategia Digital Nacional<br><a href="https://www.telesemana.com/blog/2021/09/09/mexico-y-su-estrategia-digital-nacional/">https://www.telesemana.com/blog/2021/09/09/mexico-y-su-estrategia-digital-nacional/</a>  |
| 127. | Aprende en casa<br><a href="https://aprendencasa.sep.gob.mx/site/index">https://aprendencasa.sep.gob.mx/site/index</a>  |
| 128. | SEP gasta 88% más en “Aprende en Casa”<br><a href="https://www.elsoldemexico.com.mx/mexico/sociedad/sep-gasta-88-mas-en-aprende-en-casa-7148199.html">https://www.elsoldemexico.com.mx/mexico/sociedad/sep-gasta-88-mas-en-aprende-en-casa-7148199.html</a>   |
| 129. | <a href="https://www.betterthancash.org/">https://www.betterthancash.org/</a>   |
| 130. | ENERXICO: Las técnicas de supercomputación al servicio del sector en ergético mexicano<br><a href="https://www.gob.mx/inin/acciones-y-programas/enerxico-las-tecnicas-de-supercomputacion-al-servicio-del-sector-energetico-mexicano">https://www.gob.mx/inin/acciones-y-programas/enerxico-las-tecnicas-de-supercomputacion-al-servicio-del-sector-energetico-mexicano</a>   |

### 16.3.8 Infrastructure and Energy

| Transport                                 |   |
|---|---|
| Overview                                  | Inland transportation is mainly by automobile, domestic aviation and subway in Mexico City, and freight trains.<br>Metro (226km, 12 lines, 195 stations), metro buses (BRT system, 125km, 7 lines, 283 stations) and other public buses are available in Mexico City. |
| Leadership governance                     | Ministry of Communications and Transport (SCT)  |
| Major development partners                | JICA / UNDP / IADB / GIZ  |
| Energy and electricity                    |   |
| Overview                                  | Eighty-nine percent of primary energy is gas, oil and coal, but self-sufficiency is 86%. Renewable energy (hydropower, wind, solar) accounts for 20.3% of the electrical energy mix.  |
| Carbon neutral national plan              | No information.<br>Target: Reduce GHG emissions by 22-36% by 2030 (2020 NDC).<br>40% for power generation from zero or low emission type by 2035, 50% by 2050 (energy transition strategy for 2020)   |
| Leadership governance and utility company | Ministry of Energy (SENER)<br>Federal Electricity Commission (CFE)  |
| Major development partners                | JICA / IADB / GIZ   |

Source: JICA Study Team with reference to various websites of the government organization and international organization (WB / IEA / IRENA / US DOE).

### 16.3.9 Tourism

Due to the high proportion of domestic travel consumption, the impact of COVID-19 on the tourism sector is limited.

|   |  |  |
|---|--|--|
| Number of international tourist arrivals (2019) | 45,024 thousand(7 <sup>th</sup> out of 159 countries)  |  |
| International Tourism Receipts(19)              | USD 24,573 million (16 <sup>th</sup> out of 159 countries)   |  |
| Tourism Competitiveness Ranking (2019)          | 4.7 out of 7 (19 <sup>th</sup> out of 140 countries)<br>Highly rated field: Natural resources (6.0 out of 7 points, 1 <sup>st</sup> out of 140 countries)<br>Low evaluation field: Safety and security (4.2 out of 7 points, 126 <sup>th</sup> out of 140 countries) |  |
| Tourism Dependency Index (2019)                 | 11.0 (70 <sup>th</sup> out of 166 countries)   |  |
| Government of Japan policy                      | Number of JICA projects in the last 10 years   | none   |
|   | References to the Country Assistance Policy  | none   |
|   | Interest in pilot projects   | N / A  |
| Tourism industry vulnerability                  | Contribution of Travel & Tourism to GDP (2019)   | 15.5% (12 <sup>th</sup> out of 23 countries) |
|   | Contribution of Travel & Tourism to employment (2019)  | 13.3% (13 <sup>th</sup> out of 23 countries) |
|   | Ratio of international spending (2019)   | 15% (23 <sup>rd</sup> out of 23 countries)   |
|   | Top 3 countries of origin of visitors  | USA (82.05%)                                 |



|  |  |  |
|--|--|--|
|  | (2019)   | Canada (5.10%)<br>UK (1.24%)   |
| Importance of tourism  | Ratio of the budget amount of tourism-related ministries to the national budget amount (2019)            | 0.2% (12 <sup>th</sup> out of 16 countries)<br>National budget: MXN 5,814,291,700,000<br>Budget of tourism-related ministries: MXN 8,785,888,223 |
|  | Whether or not it is mentioned as a priority sector in the National Economic and Social Development Plan | none   |
|  | Existence of effective national tourism policies / strategies / plans                                    | Yes (Programa Sectorial de Turismo 2020-2024)  |
| Impact of COVID-19   | Changes in the contribution of Travel & Tourism to GDP (2019 → 2020)                                     | -48.1% (20 <sup>th</sup> out of 23 countries)  |
|  | Changes in the contribution of Travel & Tourism to employment (2019 → 2020)                              | -17.1% (23 <sup>rd</sup> out of 23 countries)  |
| Number of government support measures for the tourism sector |  | 13 (Fiscal policy: 1, Monetary policy: 1, Resumption of tourism: 2, Health and safety protocol: 1, Domestic travel: 3, Others: 5)                |

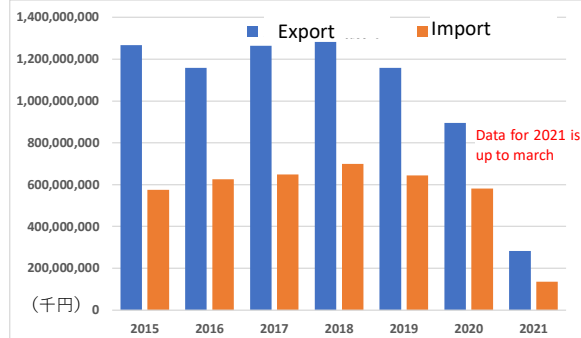
Source: Survey Team

### 16.3.10 Public-private partnership

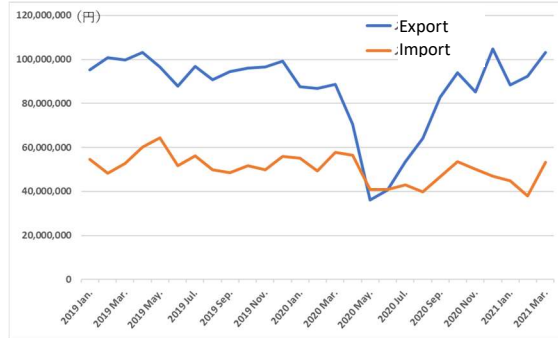
| item   |  | Contents               |
|--|--|------------------------|
| No. of JICA Public-Private Partnership Projects (After 2012)                 | Cooperation preparatory survey (overseas investment and financing) (former PPP infrastructure project)           | 0 cases                |
|  | Overseas investment and loan   | 1                      |
|  | SME Partnership Promotion Survey (support for Small-sized Enterprise)  | 2 cases                |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for small- and medium- sized enterprise) | Ten                    |
|  | SDGs Business Verification Survey with Private Sector (support for small- and medium- sized enterprise)          | 0 cases                |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for large enterprise)                    | 3 cases                |
|  | SDGs Business Verification Survey with Private Sector (support for large enterprise)                             | 0 cases                |
| Total number of Japanese private companies entering the market (2019 survey) | Total number of business locations   | 1299 companies         |
|  | Overseas branches of Japanese companies,   | 43 companies           |
|  | Local corporations wholly owned by Japanese companies and their branches   | 724 companies          |
|  | Branch offices wholly owned by Japanese companies and their branches   | 280 companies          |
|  | joint ventures (local corporations in which Japanese companies have a direct or indirect stake of 10% or more)   | 109 companies          |
|  | joint ventures (Branch offices in which Japanese companies have a direct or indirect stake of 10% or more)       | 46 companies           |
|  | companies established overseas by Japanese nationals (in which Japanese nationals have a stake of 10% or more)   | 93 companies           |
|  | Unknown classification   | 4 companies            |
| Number of Japanese residents (2020 survey)                                   | Total  | 12600 people           |
|  | Long-term residents  | 9848 people            |
|  | Permanent resident   | 2752 people            |
| Business Environment   | Doing Business 2020 Rank   | 60 <sup>th</sup> place |
| PPP Project  | Existence of PPP law scheme  | ○                      |
|  | PPP project with Japanese companies  | 12 cases               |

Trade trends with Japan

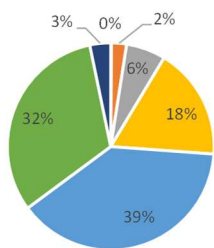
Total import / export (annual transition)  
Blue – Export / Orange – Import



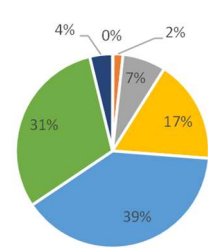
Total import / export (monthly transition)  
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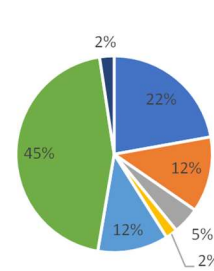
Export items (2019)



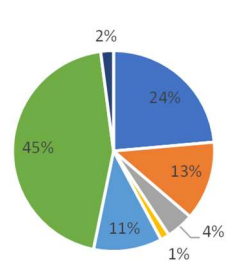
Export items (2020)



Imported items (2019)



Imported items (2020)



Gathering information about the PPP system

| N°  | Task Item   | Inquiries/comments/status<br>Title of submitted file   | Source/URL   |
|-----|---|--|--|
| 1   | <b>PRIORITY 4. PPP Sector</b>   |  |  |
| 1.1 | PPP Projects in selective countries<br>PPP rules and regulations in Central America and Caribbean Countries |  | All below can be useful  |
| A   | PPP laws and Regulations<br>if there is any, when, and how  | - Ley de Asociaciones Público Privadas<br><br>- Reglamento de la Ley de Asociaciones Público Privadas<br><br>- LINEAMIENTOS para la elaboración y presentación de los análisis costo y beneficio de los programas y proyectos de inversión.<br>- LINEAMIENTOS que establecen las disposiciones para determinar la conveniencia de llevar a cabo un proyecto mediante un esquema de asociación público privada.<br>- LINEAMIENTOS para el registro en la Cartera de Programas y Proyectos de Inversión<br>- LINEAMIENTOS para el seguimiento del ejercicio de los programas y proyectos de inversión, proyectos de infraestructura productiva de largo plazo y proyectos de asociaciones público privadas, de la Administración Pública Federal | <a href="http://www.diputados.gob.mx/LeyesBiblio/pdf/LAPP_150618.pdf">http://www.diputados.gob.mx/LeyesBiblio/pdf/LAPP_150618.pdf</a><br><br><a href="http://www.diputados.gob.mx/LeyesBiblio/regley/Reg_LAPP_200217.pdf">http://www.diputados.gob.mx/LeyesBiblio/regley/Reg_LAPP_200217.pdf</a><br><br><a href="https://www.gob.mx/cms/uploads/attachment/file/21174/Lineamientos_costo_beneficio.pdf">https://www.gob.mx/cms/uploads/attachment/file/21174/Lineamientos_costo_beneficio.pdf</a><br><br><a href="https://www.gob.mx/cms/uploads/attachment/file/21247/lineamientos_a_pp_31_dic_13.pdf">https://www.gob.mx/cms/uploads/attachment/file/21247/lineamientos_a_pp_31_dic_13.pdf</a><br><br><a href="https://www.gob.mx/cms/uploads/attachment/file/21213/registro.pdf">https://www.gob.mx/cms/uploads/attachment/file/21213/registro.pdf</a><br><br><a href="https://www.gob.mx/cms/uploads/attachment/file/23123/lineamientos_seguinte_ejercicio_inversion.pdf">https://www.gob.mx/cms/uploads/attachment/file/23123/lineamientos_seguinte_ejercicio_inversion.pdf</a> |
| B   | PPP Unit Organization<br>if there is any, how structured  | - Capitalization and investment fund for the rural sector (Fondo de capitalización e inversión del sector rural FOCIR) This is not a PPP Unit organization but is an example of a Unit dedicated to help in a PPP.   | <a href="https://pppknowledge.org/countries/mexico">https://pppknowledge.org/countries/mexico</a><br><a href="https://www.gob.mx/focir/acciones-y-programas/asociaciones-publico-privadas-app">https://www.gob.mx/focir/acciones-y-programas/asociaciones-publico-privadas-app</a>   |
| C   | PPP sectors<br>in what sectors are the PPPs allowed   | - Any sector is allowed (article 26 of the Public Private Associations Law - page 10)  | <a href="http://www.diputados.gob.mx/LeyesBiblio/pdf/LAPP_150618.pdf">http://www.diputados.gob.mx/LeyesBiblio/pdf/LAPP_150618.pdf</a>  |
| D   | Proposal Types (Solicited or Unsolicited)<br>unsolicited  | - Both are allowed ( The unsolicited are mentioned in the article 26 page 10 "Anyone interested in carrying out a public-private partnership project may submit their proposal to the competent federal agency or entity" of the Public Private Associations Law, and have some requirements)  | <a href="http://www.diputados.gob.mx/LeyesBiblio/pdf/LAPP_150618.pdf">http://www.diputados.gob.mx/LeyesBiblio/pdf/LAPP_150618.pdf</a>  |
| E   | PPP Forms<br>BOT,BTO,DB,...,what form are allowed   | - Every form is allowed (Second Section Of Public-Private Partnership Contracts (page 4)   | <a href="https://publications.iadb.org/en/evaluation-public-private-partnerships-infrastructure">https://publications.iadb.org/en/evaluation-public-private-partnerships-infrastructure</a><br><a href="https://blog.vise.com.mx/modalidades-de-asociaciones-publico-privadas-en-mexico-(example)">https://blog.vise.com.mx/modalidades-de-asociaciones-publico-privadas-en-mexico-(example)</a>   |
| F   | PPP types<br>Availability payment, service purchase   | - Any type is allowed (article 26 of the Public Private Associations Law - page 10)  | <a href="http://www.diputados.gob.mx/LeyesBiblio/pdf/LAPP_150618.pdf">http://www.diputados.gob.mx/LeyesBiblio/pdf/LAPP_150618.pdf</a>  |
| G   | PPP Project Trends<br>how much PPP projects in the last 10 years  | 169 (2010 to 2020)<br>See file "210520_PPP Database" sheet "For G"   | <a href="https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true">https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true</a>  |
| H   | Participation of Japanese firms in PPP Projects<br>if any (check news source)                               | Electricidad Aguila de Tuxpan (2001), Mitsubishi Altamira (2002), Mitsubishi Valladolid III (2004), Mitsui and Chubu Electric Power Company San Luis Potosi Wastewater Treatment (2004), Sumitomo Corporation Tuxpan V (2004), Kyushu Electric Power Corp and Mitsubishi Queretaro Aqueeduct II (2007), Mitsui San Pedro Martir Waste Water Treatment Plant (2007), Mitsui Agua Prieta Wastewater Treatment Plant (2009), Mitsui Atononico Waste Water Treatment Plant (2010), Mitsui Bii Stinu Wind Energy Project (2013), Mitsui Eoliatic del Pacifico Wind Power Plant (2013), Mitsui<br>The information shown was worked using the data from the WorldBank website.<br>See file "210520_PPP Database"                                      | <a href="https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true">https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true</a>  |

Source: Survey Team

## 17. Nicaragua

### 17.1 Country overview (basic information)

#### 17.1.1 Basic information

The Republic of Nicaragua (Spanish: República de Nicaragua), commonly known as Nicaragua, is a republic of Latin America located in central Central America. It borders Honduras to the northwest and Costa Rica to the south, facing the Caribbean Sea to the east and the Pacific Ocean to the southwest. It also owns the Corn Islands and the Misquito Islands in the Caribbean Sea. The capital is Managua. Nicaragua is the largest country in Central America in the narrow sense. Due to the dictatorship of the Somoza family that lasted from 1936 to 1979 and the civil war after the Nicaraguan Revolution against the Somoza dictatorship, development was extremely distorted, and as a result, national income and literacy rates were still low in Central America. It is in. More than 80% of the population is concentrated in Managua, Leon, Granada, Masaya, etc. on the western Pacific side, and the population density on the Caribbean side is low. More than 40% of the working population is engaged in the primary industry, the main industries are coffee, bananas, sugar cane, beef and cigars. Coffee cultivation is flourishing in the northern mountainous regions of Matagalpa and Jinotega. In recent years, beans have been exported to Japan, but they are not as good as those from Costa Rica and Guatemala. In the northwest, sugar cane and shrimp are cultivated. Cigars and rum from Nicaragua are considered to be as high-class as Cuban. During the Sandinista administration from 1979, relations with socialist countries such as Cuba and the Soviet Union were close, but after the Chamorro administration, relations with the United States were restored and omnidirectional diplomacy was developed. The Ortega administration, which was launched in 2007, has strengthened relations with Venezuela and Cuba through participation in the American People's Bolivar Alliance (ALBA), as well as with Iran and Russia. Although relations with the United States, which has deep immigration and trade ties, are maintained, President Ortega's anti-American remarks are also conspicuous.

#### 17.1.2 General circumstances

|             |   |                 |   |
|-------------|---|-----------------|---|
| 1 area      | 130,370 square kilometers (total area of Hokkaido and Kyushu) | 2 Population    | 6.47 million (2018 World Bank)                          |
| 3 Capital   | Managua city  | 4 ethnic groups | Mixed race 70%, European 17%, African 9%, Indigenous 4% |
| 5 languages | Spanish   | 6 religion      | Catholic, Protestant, etc.                              |

Source: Ministry of Foreign Affairs HP Nicaragua Republic Basic Data

#### 17.1.3 Economic overview

|   |  |                              |   |
|---|--|------------------------------|---|
| 1 Major industry  | Agriculture and livestock (coffee, beef, gold, beans, sugar, dairy products, peanuts)  | 2 GDP<br>3 GNI / person      | US \$ 13.12 billion (2018, World Bank)<br>6.84 (2019 Statista)                        |
| 4 Economic growth rate                                      | -3.8% (2018, Central Bank)   | 5 Unemployment rate          | 5.2% (Incomplete employment rate: 50.1%) (2018, Development Information Agency INIDE) |
| 6 Price increase rate                                       | -6.1% (2019, Central Bank)   |                              |   |
| 7 Total trade amount  | Exports (FOB): US \$ 2,516.9 million (2018 Central Bank)<br>Imports (CIF): US \$ 5,199.6 million (2018, Central Bank)  |                              |   |
| 8 Major trade items   | Exports: beef, coffee, gold, sugar, dairy products, peanuts, etc. (2018, Central Bank)<br>Import: Diesel, gasoline, lubricating oil, food products, pharmaceuticals, crude oil, clothes, shoes, etc.   |                              |   |
| 9 Major trading partners (January-April 2019, Central Bank) | Exports: 1 <sup>st</sup> US (43.8%), 2 <sup>nd</sup> El Salvador (10.0%), 3 <sup>rd</sup> Costa Rica (6.0%), 4 <sup>th</sup> Guatemala (4.4%), 5 <sup>th</sup> Honduras (3.4%), (Japan (0.5%))<br>Imports: 1 <sup>st</sup> US (27.3%), 2 <sup>nd</sup> China (12.0%), 3 <sup>rd</sup> Costa Rica (8.9%), 4 <sup>th</sup> Mexico (8.7%), 5 <sup>th</sup> Guatemala (8.0%), (Japan (1.8%)) |                              |   |
| 10 currencies   | Cordoba  | 11 Foreign currency reserves | na  |
| 12 National   | na   | 13 External                  | US \$ 6,057.0 million (Q2 2019, Central   |

| budget               | debt balance   | Bank) |
|----------------------|--|-------|
| 14 Economic overview | <p>(1) Since the Chamorro administration, which was inaugurated in 1990, Nicaragua has taken policies focusing on economic stabilization, structural adjustment, and reduction of accumulated debt in order to rebuild the economy destroyed by the civil war. Achieved 4.2%. Inflation, which exceeded 10,000% in 1990, decreased to 7.3% in 1997 (3.1% in 2015). In recent years, the annual economic growth rate has been maintained at the 4% level. However, the negative legacy of the civil war in the 1980s could not be wiped out, and the country is still one of the poorest countries in Latin America.</p> <p>(2) After the Ortega administration was inaugurated in 2007, inflation caused by soaring international crude oil prices and food prices in 2008 (temporarily 24% per annum), and the turmoil in domestic affairs after the unified mayoral election held in November 2009. Despite a decrease in aid from Western countries and foreign investment, good economic performance was maintained due to the impact of huge economic cooperation from Venezuela. The IMF has also evaluated it, and in October 2010, the IMF approved an extension of its economic program (Expanded Credit Grant Facility).</p> <p>(3) Nicaragua has been certified as a Heavily Indebted Poor Country (HIPC), and in September 2001, the Poverty Reduction Strategy Paper was completed and discussions on debt relief were held. In addition, in order to promote structural adjustment policies, an agreement was reached with the IMF on the New Poverty Reduction and Growth Facility (PRGF) in 2002, and the “National Development Plan” was formulated in 2003. Through these efforts, the HIPC was reached at the time of completion (completion point) in January 2004, and debt forgiveness equivalent to US \$ 4.5 billion out of US \$ 6 billion in external debt was granted, and Japan also waived about 13 billion yen. Gone. Poverty in Nicaragua is still serious, and the most important policy issue of the current administration is poverty reduction. The Ortega administration is promoting social programs such as the “Zero Hunger Plan (Umble Zero)” aimed at eradicating hunger and promoting production in rural areas.</p> <p>(4) The US-Central America-Dominican (Joint) Free Trade Agreement (DR-CAFTA) came into effect in April 2006. A free trade agreement (FTA) with Mexico in 1998, Taiwan in January 2008, Panama in November 2009, and Chile in October 2012 came into effect. The Central America-EU Economic Partnership Agreement came into effect in August 2013. The Central America / Korea FTA was signed in February 2018, and will come into effect sequentially starting from October 2019 in Nicaragua.</p> <p>(5) In 2012, the Nicaragua Interoceanic Canal Construction Law was passed by the Diet, and the Canal Authority was established. In 2013, a canal-related bill was passed, including granting a concession to Hong Kong company HKC. HKND, a subsidiary of HKC, proceeded with the plan, and in 2014, the canal route was announced and the groundbreaking ceremony was held. In November 2015, the government approved the environmental and social impact assessment. However, no major movement has been seen in canal construction since then.</p> <p>(6) Due to political instability that began in April 2018, many negative factors for economic growth such as sluggish lending, low investor confidence, sluggish tax revenue, and US sanctions have occurred, and international organizations The 2019 GDP growth rate forecast value is expected to be about -5%.</p> |       |

Source: Ministry of Foreign Affairs HP Nicaragua Republic Basic Data

## 17.1.4 Country-specific development cooperation policy

### (1) Government of Japan Development Cooperation Policy by Country

**Table 17-1 Overview of Japan’s ODA to Nicaragua**

|   |   |
|---|---|
| <b>1. 1. Overview</b>                       | Japan’s economic cooperation with Nicaragua began in 1964 with the acceptance of trainees, and began in earnest following the end of the civil war due to the implementation of the democratic presidential election in 1990. Japan has provided support to the country in a wide range of fields, including the construction of major bridges on national roads, education, health care, agricultural development, human resource development, and disaster prevention, centered on grant-aid and technical cooperation.   |
| <b>2. 2. Aim of development cooperation</b> | In Nicaragua, more than 40% of the population still belongs to the poor, and the poverty gap between urban and rural areas is remarkable. Vulnerability to natural disasters such as hurricanes and earthquakes, and deterioration of the living environment in the metropolitan area due to the concentration of one-third of the population in the metropolitan area are obstacles to national development. Japan’s support for Nicaragua in such a situation will contribute to solving the development issues of the country and deepening bilateral relations, as well as the priority issues of Japan’s ODA Charter, “poverty reduction” and “global issues”. It is also significant from the perspective of “approach to”. |
| <b>3. 3. Basic policy</b>                   | The basic policy is stable economic growth by reducing poverty and reducing disparities. In order to support stable economic growth in Nicaragua, we will focus on poverty reduction and inequality correction, build a foundation for economic revitalization, and support social development in the poor and regions. In addition, we will support environmental conservation and disaster prevention by utilizing Japan’s technology and knowledge.  |
| <b>4. Priority areas</b>                    | (1) Building a foundation for economic revitalization: By developing social capital such as road infrastructure, which is the basis of economic development, and supporting the promotion of agriculture, pasture and fisheries, which are the  |

core industries of the nation, and rural development. , To raise the level of the country’s economic base.

(2) Social development in the poor and regions: As support for the poor in rural areas and the poor areas of the metropolitan area, people’s improvement of the quality of primary and secondary education, including facility development, and improvement of health care and hygiene, etc. Contribute to improving the quality of life.

(3) Environmental conservation and disaster prevention: In the field of environmental conservation by introducing renewable energy and energy saving utilizing the knowledge possessed by Japan, paying attention to the deterioration of the living environment due to the influx of population into the city and the vulnerability to frequent natural disasters. We will provide support in the field of disaster prevention, such as mitigation of disaster risk and response in the event of a disaster.

Source: Ministry of Foreign Affairs HP Nicaragua Country Data Collection 2017

**Table 17-2 National Development Cooperation Policy for Nicaragua (September 2017)**

| 3. 3. Priority field (medium goal)                           |   |
|--|---|
| (1) Building a foundation for promoting economic development | Develop social capital, such as road infrastructure, which will be the basis of economic development, and raise the level of the country’s economic base. In addition, we will continue to support the development of industrial human resources in the country through technical cooperation and the improvement of the systems and abilities of the government and communities that are responsible for regional development. |
| (2) Social development in the poor / regions                 | Improve primary and secondary education, health care and hygiene, including facility development, as support for rural areas and poor areas in the metropolitan area.   |
| (3) Environmental protection and disaster prevention         | We will provide support in the fields of environmental conservation such as renewable energy, introduction of energy saving, and natural resource management, and disaster prevention fields such as disaster risk reduction and disaster response, utilizing the knowledge possessed by Japan.   |

Source: Survey Team

## (2) Survey on COVID-19 by development partners

We extracted sector names and specific quantitative figures that have a large impact on the country-specific analysis described in various reports of development partners. Reports from the World Bank, OECD, BCIE, SICA, and the Ministry of Economy, Trade and Industry of Japan suggest the importance of introducing digitalization and innovation (Fintech, Aggrotech, Autotech, etc.), and incorporate the survey results of these development partners. I arranged it accordingly.

World Bank: “Growth and Revitalization” 2021 Semi-Annual Economic Report (March 2021)

- ✓ OECD: COVID-19 in LAC, Regional socio-economic implications and policy priorities (December 2020)
- ✓ BCIE: Impacto Económico del COVID-19 (April 2020)
- ✓ SICA: Estimación del Impacto Económico del COVID-19 en Centroamérica y República Dominicana (April 2020)
- ✓ Ministry of Economy, Trade and Industry of Japan: “Economic and Industrial Policy Based on the Impact of the New Corona Virus” (June 2020), Accelerating Digitization and Onlineization, Gig Economy, Innovation in the Transition to a New Everyday Life 1) Medical care / health, 2) Digital: Infrastructure development premised on the arrival of a digital society, 3) Green: Response to climate change problems, Energy security, 4) Emphasizes resilience.

### 17.1.5 Policies for COVID-19 measures taken by governments of each country

Various policies for COVID-19 taken by the government are described on the ECLAC homepage “COVID-19 Observatory” by country, time series, and field, and can be analyzed.





Source: <https://cepalstat-prod.cepal.org/forms/covid-countrysheet/index.html?table=2&country=HND>

In this survey, the 26 policies implemented in Nicaragua listed on this website were classified by sector as much as possible.

### 1) Infection spread and alleviation of aggravation and death

No material was available.

### 2) Support for affected industries and people

**Table 17-3 Support for Affected Industries and People (Nicaragua)**

| Various government policies (COVID-19 Observatory for LAC) |    |  |  |
|--|----|--|--|
| Socioeconomic policy                                       | 4  |  |  |
| Health care & nutrition                                    | 9  |  |  |
| Education  | 0  |  |  |
| Agriculture & rural development                            | 0  |  |  |
| Private sector   | 4  |  |  |
| Environment & disaster prevention                          | 0  |  |  |
| Governance and social security                             | 4  |  |  |
| DX and innovation  | 2  |  |  |
| Infrastructure & energy                                    | 0  |  |  |
| Tourism  | 0  |  |  |
| PPP  | 0  |  |  |
| Others (b)   | 3  |  |  |
| total  | 26 |  |  |

Source: Survey Team

### 3) Arrangement of various policies for COVID-19 taken by the government

COVID-19 Observatory for Latin America and Caribbean (ECLAC) organized by governments



**Table 17-4 Government-directed COVID-19 Policy Categories (Nicaragua)**

**Follow-up of the evolution of COVID-19 Measures**

| <b>Vaccination</b>  | <b>Economy</b>   | <b>Social protection</b>  |
|---|--|---|
| 1. Vaccination measures   | 1. Fiscal Policy   | 1. Cash transfers (new transfers, increase in existing transfers, expansion of cash transfers to new recipients, early disbursement of transfers) |
| <b>Movements across and within countries</b>  | 2. Monetary Policy   | 2. Food transfers / In-kind transfers   |
| 1. Restrictions or prohibition on the entry of foreign travelers  | 3. Business policy   | 3. Guarantee of basic services  |
| 2. Border closures and controls   | 4. Restriction of economic activity (including shops and shopping centers)                             | <b>Education / schools</b>  |
| 3. Border controls  | 5. Price and quantity controls   | 1. Suspension of classes  |
| 4. Restriction or closure of public places and mass gatherings  | 6. Economic Stimulus (includes aggregate value of fiscal measures and separately of credit guarantees) | 2. Provision of tools for distance learning (online platforms, TV, radio, distance-learning materials)  |
| 5. Other  | 7. Regulation of the personal hygiene and cleaning products market                                     | 3. Maintenance of school feeding programme (indicating under which modalities)  |
| <b>Health</b>   | 8. Debt relief and suspension of credit payments (individuals, microentrepreneurs)                     | <b>Gender</b>   |
| 1. Health emergency   | 9. Other   | 1. Gender-based violence against women  |
| 2. Mandatory coverage   | <b>Labor</b>   | 2. Care economy   |
| 3. Mandatory quarantine for foreign travelers, confirmed or suspected cases                                   | 1. Labor Protection  | 3. Employment and income generation   |
| 4. Mandatory general quarantine   | 2. Elective work leave   | 4. Benefits, transfers and other social protection measures   |
| 5. Type of policy on testing (universal, reduced to certain groups, etc.)                                     | 3. Reduction of working hours  | 5. Women's participation in the digital era   |
| 6. Free test coverage expansion   | 4. Prohibition of dismissal from work  | 6. Other  |
| 7. Hospitals (mechanical ventilators, additional ICU beds, protection equipment, temporary hospitals, others) | 5. Other   |   |

Source: Survey Team

## 17.2 Macroeconomic analysis and selection of priority countries

### 17.2.1 Macroeconomic analysis

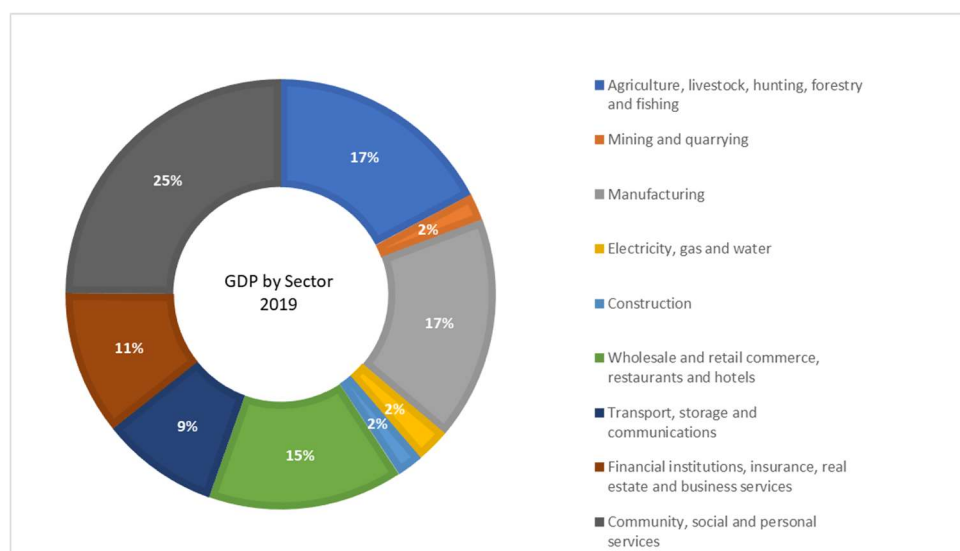
#### (1) Industrial composition

**Table 17-5 Industrial Composition (Nicaragua)**

Table: Gross domestic product, by sector (En millones de córdobas oro a precios constantes de 2006)

|  | 2011    | 2012    | 2013    | 2014    | 2015    | 2016    | 2017    | 2018    | 2019a/  | 2020 a/ |
|--|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Agriculture, livestock, hunting, forestry and fishing                | 23,393  | 23,290  | 22,811  | 23,291  | 23,140  | 24,250  | 26,482  | 26,715  | 27,458  | 27,667  |
| Mining and quarrying   | 1,865   | 2,068   | 2,532   | 2,541   | 2,534   | 2,741   | 2,536   | 2,594   | 3,209   | 3,314   |
| Manufacturing  | 19,208  | 21,171  | 22,554  | 24,261  | 24,863  | 25,775  | 26,511  | 26,649  | 26,822  | 26,194  |
| Electricity, gas and water   | 2,501   | 2,983   | 3,623   | 4,048   | 4,125   | 4,177   | 4,015   | 4,186   | 4,055   | 3,574   |
| Construction   | 2,917   | 3,706   | 4,113   | 4,187   | 5,251   | 5,179   | 5,623   | 4,748   | 3,176   | 3,547   |
| Wholesale and retail commerce, restaurants and hotels                | 20,038  | 21,478  | 22,244  | 23,036  | 24,351  | 25,604  | 27,445  | 23,480  | 23,314  | 22,682  |
| Transport, storage and communications                                | 11,601  | 12,294  | 12,963  | 13,518  | 14,560  | 15,587  | 16,488  | 15,799  | 14,029  | 12,961  |
| Financial institutions, insurance, real estate and business services | 14,638  | 14,992  | 15,761  | 16,722  | 17,515  | 18,487  | 19,208  | 18,581  | 17,219  | 16,552  |
| Community, social and personal services                              | 26,295  | 26,632  | 26,991  | 27,377  | 27,786  | 28,221  | 28,677  | 29,142  | 39,528  | 39,070  |
| Total  | 122,455 | 128,613 | 133,591 | 138,981 | 144,124 | 150,021 | 156,986 | 151,893 | 158,810 | 155,560 |

Source: ECLAC



Source: Survey Team

## (2) Trends in major economic indicators

**Table 17-6 Trends in Major Economic Indicator (Nicaragua)**

Table 1 NICARAGUA: MAIN ECONOMIC INDICATORS (Annual growth rates)

|  | 2011     | 2012     | 2013     | 2014     | 2015     | 2016     | 2017     | 2018     | 2019a/   | 2020 a/ |
|--|----------|----------|----------|----------|----------|----------|----------|----------|----------|---------|
| Gross domestic product (Annual growth rates c/)                                      | 6.3      | 6.5      | 4.9      | 4.8      | 4.8      | 4.6      | 4.6      | -4.0     | -3.7     | -2.0    |
| Per capita gross domestic product (Annual growth rates c/)                           | 4.9      | 5.1      | 3.5      | 3.4      | 3.4      | 3.2      | 3.3      | -5.1     | -4.2     | -1.0    |
| Gross domestic product, by sector (Annual growth rates c/)                           |          |          |          |          |          |          |          |          |          |         |
| Agriculture, livestock, hunting, forestry and fishing                                | 5.7      | -0.4     | -2.1     | 2.1      | -0.7     | 4.8      | 9.2      | 0.9      | 3.0      | 0.9     |
| Mining and quarrying   | 25.7     | 10.9     | 22.4     | 0.4      | -0.3     | 8.2      | -7.5     | 2.3      | 17.5     | 3.3     |
| Manufacturing  | 9.8      | 10.2     | 6.5      | 7.6      | 1.0      | 3.7      | 2.9      | 0.5      | -0.3     | -2.3    |
| Electricity, gas and water   | 1.8      | 19.3     | 21.4     | 11.7     | 1.9      | 1.3      | -3.9     | 4.3      | -1.3     | -15.5   |
| Construction   | 10.8     | 27.1     | 11.0     | 1.8      | 25.4     | -1.4     | 8.6      | -15.6    | -34.5    | 11.7    |
| Wholesale and retail commerce, restaurants and hotels                                | 8.9      | 7.2      | 3.6      | 3.6      | 5.7      | 5.1      | 7.2      | -14.4    | -4.3     | -4.0    |
| Transport, storage and communications  | 12.6     | 6.0      | 5.4      | 4.3      | 7.7      | 7.1      | 5.8      | -4.2     | -8.9     | -7.6    |
| Financial institutions, insurance, real estate and business services                 | -0.6     | 2.4      | 5.1      | 6.1      | 4.7      | 5.6      | 3.9      | -3.3     | -19.9    | -11.5   |
| Community, social and personal services  | 1.2      | 1.3      | 1.4      | 1.4      | 1.5      | 1.6      | 1.6      | 1.6      | 1.6      | -1.0    |
| Balance of Payments (Millions of dollars)  |          |          |          |          |          |          |          |          |          |         |
| Current account balance  | -1,163.9 | -1,234.8 | -1,380.4 | -953.8   | -1,259.6 | -1,127.1 | -987.1   | -242.7   | 755.9    | 632.5   |
| Goods balance  | -2,253.5 | -2,290.4 | -2,234.9 | -2,142.9 | -2,514.2 | -2,497.0 | -2,369.6 | -1,604.1 | -1,055.9 | -927.9  |
| Exports, f.o.b.  | 3,416.1  | 3,919.4  | 3,879.0  | 4,175.8  | 3,873.4  | 3,794.6  | 4,179.5  | 4,197.4  | 2,696.8  | 2,852.0 |
| Imports, f.o.b.  | 5,669.6  | 6,209.8  | 6,113.9  | 6,318.7  | 6,387.6  | 6,291.6  | 6,549.1  | 5,801.5  | 4,352.4  | 4,411.9 |
| Services trade balance   | 128.7    | 161.6    | 19.7     | 187.1    | 229.1    | 392.0    | 527.1    | 402.3    | 518.5    | 328.8   |
| Income balance   | -268.7   | -415.8   | -534.2   | -447.9   | -489.0   | -634.2   | -711.7   | -652.2   | -466.4   | -363.5  |
| Net current transfers  | 1,229.6  | 1,309.8  | 1,369.0  | 1,449.9  | 1,514.5  | 1,612.1  | 1,567.1  | 1,611.3  | 1,757.9  | 1,920.4 |
| Capital and financial balance (Millions of dollars)                                  |          |          |          |          |          |          |          |          |          |         |
| Net foreign direct investment d/   | 928.6    | 712.3    | 815.0    | 982.8    | 922.0    | 923.8    | 970.9    | 762.5    | 503.0    | 182.3   |
| Other capital movements d/   | 322.3    | 507.3    | 660.9    | 252.9    | 534.7    | 146.6    | 316.2    | -1,032.6 | -1,080.7 |         |
| Foreign remittance from abroad for 2019 and 2020                                     | 912.0    | 1,014.2  | 1,077.7  | 1,135.8  | 1,193.4  | 1,264.1  | 1,390.8  | 1,501.2  | 1,682.4  | 1,851.4 |
| Microfinance dispatched and the sectors that received microfinance for 2019 and 2020 |          |          |          |          |          |          |          |          |          |         |

Source: Economic Survey of Latin America and the Caribbean 2020: Main conditioning factors of fiscal and monetary policies in the post-COVID-19 era

### 17.2.2 Impact analysis and identification of key sectors

#### (1) Impact assessment results for each sector by AHP analytic hierarchy process based on economic indicators

**Table 17-7 Results of Sector Impact Analysis by COVID-19 (Nicaragua)**

| ECLAC category   | Changes around COVID-19 | Trends before COVID-19 | Total GDP ratio of the sector | comprehensive evaluation |   |
|--|-------------------------|------------------------|-------------------------------|--------------------------|---|
| Importance (weight)  | 0.4590                  | 0.0660                 | 0.0750                        |                          |   |
| Agriculture, livestock, hunting, forestry and fishing                | 4                       | 4                      | 8                             | 0.060                    | 6 |
| Mining and quarrying   | 9                       | 9                      | 2                             | 0.108                    | 1 |
| Manufacturing  | 5                       | 7                      | 7                             | 0.073                    | 5 |
| Electricity, gas and water   | 8                       | 8                      | 3                             | 0.098                    | 2 |
| Construction   | 1                       | 5                      | 1                             | 0.019                    | 9 |
| Wholesale and retail commerce, restaurants and hotels                | 2                       | 3                      | 6                             | 0.035                    | 8 |
| Transport, storage and communications                                | 3                       | 6                      | 4                             | 0.046                    | 7 |
| Financial institutions, insurance, real estate and business services | 7                       | 1                      | 5                             | 0.081                    | 3 |
| Community, social and personal services                              | 6                       | 2                      | 9                             | 0.079                    | 4 |

Source: Survey Team

#### 1) ECLAC Sector Classification Amendments to the Sector Classification

In line with the method described in the main volume, the Sector Classification is divided into the Vertical Sector and the Cross-Cutting Sector, the ECLAC classification sector is allocated to the Vertical Sector Classification, and the evaluation of various policies related to COVID-19 taken by the government along with the results of the partner survey and the indicators of the national development

cooperation policy, the ranking of priority sectors are calculated using the four indicators, which are described in the table below.

**Table 17-8 Ranking of Priority Sectors (Nicaragua)**

|                                   | Economic Indicator Analysis | Government Policy on COVID-19 | Survey on COVID-19 by Development Partners | Country Development Cooperation Policy | Base Case |   | Priority |
|-----------------------------------|-----------------------------|-------------------------------|--|--|-----------|---|----------|
| Importance (weight)               | 0.6000                      | 0.2000                        | 0.1000                                     | 0.1000                                 |           |   |          |
| Social and Economic Policy        | 0.0000                      | 0.0308                        | 0.0091                                     | 0.0000                                 | 0.0399    |   | ○        |
| Health and Nutrition              | 0.0405                      | 0.0692                        | 0.0000                                     | 0.0200                                 | 0.1298    | 4 |          |
| Education                         | 0.0359                      | 0.0000                        | 0.0000                                     | 0.0200                                 | 0.0559    | 6 |          |
| Agriculture and Rural Development | 0.1038                      | 0.0000                        | 0.0182                                     | 0.0200                                 | 0.1420    | 3 | ○        |
| Manufacturing                     | 0.1196                      | 0.0308                        | 0.0182                                     | 0.0000                                 | 0.1686    | 2 | ○        |
| Environment/ Disaster Management  | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0200                                 | 0.0200    |   | ○        |
| Governance and Security           | 0.0000                      | 0.0308                        | 0.0000                                     | 0.0000                                 | 0.0308    |   | ○        |
| DX Innovation                     | 0.0000                      | 0.0154                        | 0.0273                                     | 0.0000                                 | 0.0427    |   | ○        |
| Infrastructure and Every          | 0.2618                      | 0.0000                        | 0.0091                                     | 0.0200                                 | 0.2909    | 1 | ○        |
| Tourism                           | 0.0382                      | 0.0000                        | 0.0182                                     | 0.0000                                 | 0.0564    | 5 |          |
| Public-Private Partnership        | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0000                                 | 0.0000    |   | ○        |

Source: Survey Team

## (2) Sensitivity analysis

### 1) Analysis case settings

Based on the above methodology, the following case settings were made.

**Table 17-9 Sensitivity Analysis Case-based Weighting Settings (Nicaragua)**

|  | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|--|-----------|------------------------|------------------------|------------------------|
| Economic indicator analysis  | 0.6       | 0.6                    | 0.5                    | 0.5                    |
| Investigation and arrangement of various policies for COVID-19 taken by the government | 0.2       | 0.1                    | 0.1                    | 0.1                    |
| Development partner survey results   | 0.1       | 0.2                    | 0.2                    | 0.3                    |
| Country-specific development cooperation policy  | 0.1       | 0.1                    | 0.2                    | 0.1                    |

Source: Survey Team

### 2) Summary of sensitivity analysis

The results of each sensitivity analysis are as summarized below. Sensitivity analysis did not show much change, which was close to the result of the base case.

**Table 17-10 Summary of Sensitivity Analysis Results (Nicaragua)**

|                                   | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|-----------------------------------|-----------|------------------------|------------------------|------------------------|
| Social and economic policy        |           |                        |                        |                        |
| Health care / nutrition           | 4         | 4                      | 4                      | 4                      |
| education                         | 6         | 5                      | 5                      | 5                      |
| Agriculture / rural development   | 3         | 2                      | 2                      | 2                      |
| Manufacturing industry            | 2         | 3                      | 3                      | 3                      |
| Environment / disaster prevention |           |                        |                        |                        |
| Governance and citizen security   |           |                        |                        |                        |
| DX / Innovation                   |           |                        |                        |                        |
| Infrastructure and Energy         | 1         | 1                      | 1                      | 1                      |
| sightseeing                       | 5         | 6                      | 6                      | 6                      |
| Public-private partnership        |           |                        |                        |                        |

Source: Survey Team

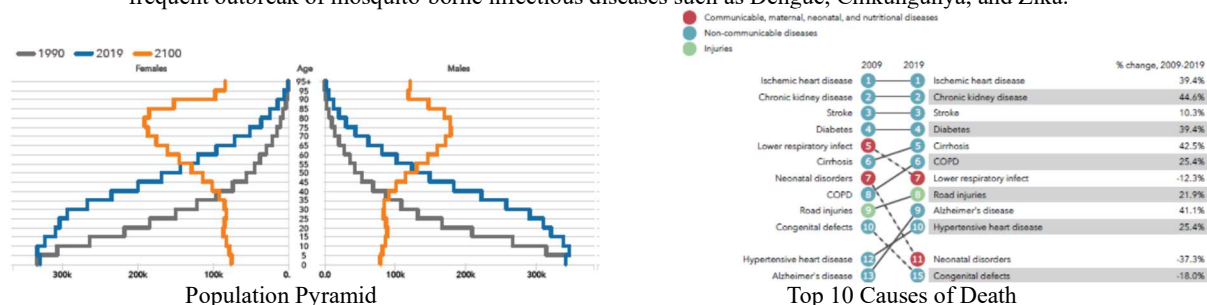
### **(3) Selection of priority sectors by country**

From the above results, 1) social / economic policy, 2) agriculture / rural development, 3) manufacturing industry, 4) environment / disaster prevention, 5) governance / citizen security, 6) DX / innovation, 7) infrastructure / energy, 8) public-private partnership are selected as priority sectors.

## 17.3 Country-specific information by sector

### 17.3.1 Health care / nutrition

Overview: Proportion of NCDs death is high. Burden of diabetes, chronic kidney diseases, and cardiovascular diseases are high. Proportion of overweight among adults is high. Inappropriate water and sanitation environment causes frequent outbreak of mosquito-borne infectious diseases such as Dengue, Chikungunya, and Zika.



| Demography                                      |   |   |  |   |                                       |                                  |
|---|---|---|--|---|---------------------------------------|----------------------------------|
| Population                                      | Urban population (%)                      | Urban population growth (%)             | Life Expectancy (years)                        |   |                                       | Population ≥ 65 (%)              |
| 6,465,513                                       | 58.76                                     | 1.64                                    | Male   | Female  | Both                                  | 5.25                             |
|   |   |   | 77.77  | 70.74   | 74.28                                 |                                  |
| Maternal, Newborn and Child Health              |   |   |  |   |                                       |                                  |
| Total fertility rate                            | Neonatal mortality (per 1,000 livebirths) | Under 5mortality (per 1,000 livebirths) | Maternal mortality (per 100,000 livebirths)    | Antenatal care ≥ 4 (%)                          | Immunization (1yr)                    |                                  |
| 2.40  | 10.60                                     | 17.30                                   | 98   | 88  | DTP (%)                               | MCV1 (%)                         |
|   |   |   |  |   | 98                                    | 99                               |
| Nutrition                                       |   |   | Health Finance                                 |   |                                       |                                  |
| Under 5 Children                                | Adult overweight (%)                      |   |  | Current health expenditure per capita (USD PPP) | Current health expenditure to GDP (%) | Out-of-pocket expenditure (%)    |
| Stunting (%)                                    | Overweight (%)                            | Male                                    | Female   | 468   | 8.56                                  | 33                               |
| 17.3  | 8.3                                       | 37                                      | 32   |   |                                       |                                  |
| Health Service Provision (per 1,000 population) |   |   | COVID-19 related Indicators as of January 2022 |   |                                       |                                  |
| Hospital beds                                   | Doctors                                   | Nurses                                  | Total confirmed cases (per million)            | Total death (per million)                       | Total number of tests (per 1,000)     | People completed vaccination (%) |
| 0.90  | 1   | 1.5                                     | 2,626.53                                       | 32.68   |                                       | 49.4                             |

Source: Graphs=Institute for Health Metrics and Evaluation, County Profile; Demography, Total fertility rate, Neonatal mortality, under-5 mortality, Health finance= World Development Indicators, the World Bank (Accessed on Aug 2021); Maternal mortality= UNICEF (Sep 2019); Antenatal care, Immunization, Nutrition, Health service provision,= OECD/The World Bank (2020), Health at a Glance: Latin America and the Caribbean 2020; COVID-19 related indicators= Our World in Data (Accessed on Jan 2022)

| Health                                  |  |
|---|--|
| Leadership/ Governance                  | Responsible Agency: Ministerio de Salud (Ministry of Health), Instituto Nicaragüense de Seguridad Social (INSS)<br><a href="http://www.minsa.gob.ni/">http://www.minsa.gob.ni/</a> ; Centralized<br>Major Relevant Policies: Política Nacional de Salud 2004                     |
| Service Providing System                | PHC model (family and community health model: MOSAFC) has been introduced since 2004, which is holistic service providing system at primary level.<br>Public sector is controlled by the Ministry of Health and INSS collaborate with private sector to provide health services. |
| Health Finance                          | Government fund and social insurance fund  |
| Human Resource for Health               | Not sufficient to the population and concentrated in urban areas. Nurses are involved in emergency medical services in rural areas.  |
| IT/ Digital Health                      | (No information)   |
| Drugs/ Medical Equipment                | Generally, deterioration and insufficient maintenance of facility and equipment are concerned. The essential medicine is procured and distributed by MOH to be provided free of charge to citizens.  |
| Priority                                | MNCH, communicable diseases, and health services in rural areas  |
| Communicable Disease Emergency Response | Necessary action and responses are undertaken along with IHR.<br>National influenza center: National Diagnostic and Reference Center (Centro Nacional de Diagnóstico y Referencia / CNDR)  |
| Major Development Partners              | PAHO/WHO, IDB, EU, some bilateral donors   |
| Nutrition                               |  |
| Institutional Arrangement               | Ministerio Agropecuario y Forestal   |
| Major Relevant Policies                 | Ley de Soberanía y Seguridad Alimentaria y Nutricional, 2009<br>Política de Seguridad Alimentaria y Nutricional desde el sector agropecuario y rural, 2009   |
| Human Resource for Health               | Nutrition related degrees: Yes<br>Nutrition related subjects in pre-service education: Yes<br>Number of nutrition related professionals: 3.6 per 100,000 population  |

Source: Survey Team with reference to WHO Country Cooperation Strategy for Nicaragua at a glance, May 2016, Institute for Health Metrics and Evaluation, County Profile, JICA, Data Collection Survey on Health Sector, Country Report of Nicaragua 2012, WHO, Global atlas of medical devices, 2017, Network of PAHO/WHO Collaborating Centers and National Reference Laboratories for Dengue in the Americas (<https://www3.paho.org/English/AD/DPC/CD/den-cc.htm>), and WHO, Nutrition Landscape Information System (NLIS)

## 17.3.2 Education

| Overview                              |   |   |                      |                             |        |                      |            |     |     |     |               |     |     |     |                   |                 |        |
|---------------------------------------|---|---|----------------------|-----------------------------|--------|----------------------|------------|-----|-----|-----|---------------|-----|-----|-----|-------------------|-----------------|--------|
| Number of children                    | <ul style="list-style-type: none"> <li>Preschool education: 9,313 public schools, 939 private schools, 289,037 children, 11,274 teachers</li> <li>Primary education: 9,818 public schools, 1,200 private schools, 902,565 children, 11,274 teachers</li> <li>Secondary education: 1,313 public schools, 521 private schools, 514,186 students, 11,911 teachers</li> </ul>   |   |                      |                             |        |                      |            |     |     |     |               |     |     |     |                   |                 |        |
| Government authority                  | Ministry of Education (Ministerio de Educación)   |   |                      |                             |        |                      |            |     |     |     |               |     |     |     |                   |                 |        |
| Education indicator                   | Public Education Budget 4.4% of GDP (2017) Source: UIS<br>Net school enrollment rate: primary education 94.89%, secondary education 48.42% (World Bank)   |   |                      |                             |        |                      |            |     |     |     |               |     |     |     |                   |                 |        |
| Learning achievement survey           | The results of the 3rd Regional Education Quality Survey (TERCE, 2013) are 652.59 points in 3rd grade mathematics (11th out of 15 countries below average), 654.28 points in 3rd grade reading comprehension (11th out of 15 countries below average), and 642.94 points in 6th grade mathematics (13th out of 15 countries below average), 662.24 points in 6th grade reading comprehension (12th out of 15 countries below average), and 668.37 points in 6th grade science (12th out of 15 countries below average). |   |                      |                             |        |                      |            |     |     |     |               |     |     |     |                   |                 |        |
| Impact of COVID-19                    |   |   |                      |                             |        |                      |            |     |     |     |               |     |     |     |                   |                 |        |
| School closure / reopening            | From March 11, 2020 to February 2, 2021, the number of days completely closed is 0 days, the number of partially closed days is 75 days. The only country in Latin America that has continued face-to-face lessons, except 60 % of private schools in the country that it has decided to suspend attendance. It has been pointed out that the number of absentees increased due to fear of infection during a pandemic.   |   |                      |                             |        |                      |            |     |     |     |               |     |     |     |                   |                 |        |
| COVID-19 measures                     | Formulated "COVID-19 National Strategy for the Basic and Secondary Education Subsystem to Face Pandemic Challenges" (Estrategia Nacional del Subsistema de Educación básica y media, para enfrentar le desafío de la pandemia COVID-19 )<br>In the 2021 general expenditure budget, 724 million Cordova was approved as a pandemic measure, and 487 million (58.2%) was allocated to the Ministry of Health and 214.4million (30.5%) to the Ministry of Education.  |   |                      |                             |        |                      |            |     |     |     |               |     |     |     |                   |                 |        |
| Distance education                    | Implementation status   | The Ministry of Education provides video tutorials, creates educational guides for each grade, and organizes digital content to be shared on educational platforms to support home learning in case of unforeseen circumstances. For secondary education, prepare an online school curriculum book that can be downloaded on Android devices. In July 2020, started television distance learning for primary and secondary school students with the aim of improving, strengthening, and leveling the learning of public school students. Virtual lessons are held at private schools using Google Classroom. The digital version of the JICA-supported math textbook can be downloaded from the Ministry of Education website. |                      |                             |        |                      |            |     |     |     |               |     |     |     |                   |                 |        |
|                                       | Access  | According to UNICEF statistical data, the rate of school-aged children / students who can connect to the Internet at home (%) (2012) is 4%. According to ECLAC (CEPAL), Nicaragua has the least access to the Internet through home networks and mobile devices in Central America. According to IDB, there is no platform for distance learning.   |                      |                             |        |                      |            |     |     |     |               |     |     |     |                   |                 |        |
|                                       | Teacher training  | Established a virtual campus, which is a virtual classroom of an online lifelong education system to strengthen teacher training nationwide.  |                      |                             |        |                      |            |     |     |     |               |     |     |     |                   |                 |        |
| School hygiene                        | Infection control measures  | Creating a biosecurity guide (education for health prevention)  |                      |                             |        |                      |            |     |     |     |               |     |     |     |                   |                 |        |
|                                       | Facility maintenance  | <table border="1"> <thead> <tr> <th>2019</th> <th>Basic water supply facility</th> <th>Toilet</th> <th>Hand-wash facilities</th> </tr> </thead> <tbody> <tr> <td>Rural area</td> <td>54%</td> <td>12%</td> <td>40%</td> </tr> <tr> <td>Whole country</td> <td>54%</td> <td>12%</td> <td>40%</td> </tr> <tr> <td>Primary Education</td> <td>Undeveloped 32%</td> <td>... ..</td> <td>.....</td> </tr> </tbody> </table> <p>Source: World Bank / UNICEF Survey <a href="https://washdata.org/">https://washdata.org/</a></p>  | 2019                 | Basic water supply facility | Toilet | Hand-wash facilities | Rural area | 54% | 12% | 40% | Whole country | 54% | 12% | 40% | Primary Education | Undeveloped 32% | ... .. |
| 2019                                  | Basic water supply facility   | Toilet  | Hand-wash facilities |                             |        |                      |            |     |     |     |               |     |     |     |                   |                 |        |
| Rural area                            | 54%   | 12%   | 40%                  |                             |        |                      |            |     |     |     |               |     |     |     |                   |                 |        |
| Whole country                         | 54%   | 12%   | 40%                  |                             |        |                      |            |     |     |     |               |     |     |     |                   |                 |        |
| Primary Education                     | Undeveloped 32%   | ... ..  | .....                |                             |        |                      |            |     |     |     |               |     |     |     |                   |                 |        |
| School lunch / nutrition              | Lunch provided from kindergarten to lower secondary school (BID country report)   |   |                      |                             |        |                      |            |     |     |     |               |     |     |     |                   |                 |        |
| Countermeasures for vulnerable people | N / A   |   |                      |                             |        |                      |            |     |     |     |               |     |     |     |                   |                 |        |
| Support for donors, etc.              | <u>IDB:</u><br>- Analysis of nutritional status of school population along the Caribbean coast. The purpose of assessing the nutritional status of vulnerable school students in Nicaragua affected by the COVID-19 pandemic and two hurricanes in 2020. Used to survey beneficiaries of a comprehensive school   |   |                      |                             |        |                      |            |     |     |     |               |     |     |     |                   |                 |        |



|  |   |
|--|---|
|  | <p>nutrition program. Total cost US \$ 150,000</p> <ul style="list-style-type: none"> <li>- COVID-19 Educational and social emotional support in the disaster. The purpose is to mitigate the negative effects on the child's cognitive and social emotional development. Application development for parents with young children to mitigate adverse effects at the educational and emotional process level. Total cost US \$ 364,353</li> </ul> <p>UNICEF: Online training for educational institutions, development of administrative processes, social and psychological support and teacher training on curriculum adaptation.</p> <p>World Bank (GPE): Digital classrooms and socio-emotional support. Design and implementation of "Mobile Digital Classroom" strategies (Aulas Digitals Móviles) and school staff, children to help children access digital learning content in 80 rural primary schools with no or limited connectivity. A social emotion support program for students and their families. Creating and distributing educational booklets for vulnerable students, improving vulnerable school infrastructure, training teachers on how to use digital classrooms, providing play and hygiene kits</p> |
|--|---|

Source: Survey Team

### 17.3.3 Agriculture / rural development

|   |  |           |           |           |           |           |
|---|--|-----------|-----------|-----------|-----------|-----------|
| Urban / rural population ratio                    | 58.5% / 41.5% (FAOSTAT 2018)   |           |           |           |           |           |
| Agricultural land area                            | 5,065,000 ha (FAOSTAT 2019) 1)   |           |           |           |           |           |
| Agricultural sector employment                    | 31.7% of all employment (male / female ratio: 73.5% / 26.5%) (FAOSTAT 2019) 2)   |           |           |           |           |           |
| Agricultural GDP                                  | 15.8% of total GDP (World Bank 2020)   |           |           |           |           |           |
| Of the agricultural sector Value added amount     | \$ 2,453,674.98 thousand (World Bank 2020) 3) * Statistics include forestry  |           |           |           |           |           |
| Agricultural sector expenditure ratio             | Ratio of agricultural fiscal expenditure to national budget (%) 4)   |           |           |           |           |           |
|   | 2018   | 2019      | 2020      |           |           |           |
|   | 1.66   | 1.72      | 2.11      |           |           |           |
| Agricultural sector import / export balance       | Trade Balance (USD1,000 FAOSTAT) 5)  |           |           |           |           |           |
|   |  | 2015      | 2016      | 2017      | 2018      | 2019      |
|   | export   | 1,952,640 | 1,793,890 | 2,142,079 | 2,058,231 | 2,116,814 |
|   | Import   | 986,509   | 1,039,468 | 1,069,089 | 1,047,711 | 1,027,701 |
|   | Balance of payments  | 966,131   | 754,422   | 1,072,990 | 1,010,520 | 1,089,113 |
| Agricultural development Policy / plan / strategy | <p>As one of Nika Agua's core industries, maintaining growth and increasing competitiveness are one of the most important issues for the further development of the agricultural sector. In the "National Plan for Production, Consumption and Trade 2021-2022" 6), the government has formulated nine agricultural policies to ensure the safety and access of food and nutrition for the people, and the purpose of each policy and its. An accompanying strategic action plan is specified.</p> <p>1) Productivity policy: [Purpose] Improve productivity and yields in major sectors of socio-economic revitalization. [Strategic plan] Distribution of food baskets, creation of added value, support for conversion to a sustainable and competitive system, improvement of genetic quality and production indicators of beef, pork and milk, etc.</p> <p>2) Research and Productive Innovation Policy: [Purpose] Transition to a sustainable production system that is resilient to climate change. [Strategic plan] Innovation, genetic improvement of animals, establishment of new research and experimental facilities for high quality seed production, etc.</p> <p>3) Food Security Policy: [Purpose] Guarantee the right to obtain sufficient, safe and nutritious food at fair prices and promote national food production and market stability. [Strategic Plan] Funding programs for economic diversification, productive transformation, environmental protection and family nutrition management. Strengthening phytosanitary and epidemiological monitoring systems, strengthening endemic and cross-border pest and disease control at the national level, etc.</p> <p>4) National Environmental Conservation Policy: [Purpose] Strengthening national resilience and adaptability to climate change, as well as transitioning to an economy based on nature and low carbon emissions. [Strategic plan] Appropriate management of forest resources. Certification of wildlife reserves and establishment of breeding farms. Continueable production / management of agroforestry systems, etc.</p> <p>5) Forest Policy: [Purpose] Promote sustainable forestry of timber and non-timber products.</p> <p>6) Commercial policy; [Purpose] To supply domestic demand at a fair price and promote the sound development of the domestic market. [Strategic plan] Promotion of economic integration process in Central America. Development of new markets such as the Southern South America Common Market (MERCOSUR), Colombia, Peru, the Eurasian Union, and Turkey. Operation of Foreign Trade Single</p> |           |           |           |           |           |

|                    |  |
|--------------------|--|
|                    | <p>Window (VUCEN) platform for the purpose of cost reduction and simplification of pre-customs clearance procedures for import and export, etc.</p> <p>7) Financing and Investment Policy: [Purpose] Manage external funding to fund public and social productive investment programs and projects that enhance production activities.</p> <p>8) Agricultural industrialization policy: [Purpose] Improve the post-harvest process to ensure the quality of agricultural products.</p> <p>9) Agricultural Land Safety Policy: [Purpose] In each production cycle, prioritize national level production zones and strengthen surveillance and patrol systems in cooperation with national police and national system agencies such as the armed forces.</p>   |
| Impact of COVID-19 | <p>The meat industry accounts for 8.8% of Nicaragua's gross domestic product (2019, FAO) and is a major export product along with coffee and gold. Despite the corona scourge, meat exports increased 3.59% from US \$ 565 million in 2019 to US \$ 586 million in 2020 (2020, CANICARNE) 7). It increased by 3.51% from the previous year to 132.99 million kilograms.</p> <p>According to the Nicaragua Beef Export Factory Chamber of Commerce (CANICARNE) 7), this strong factor is due to various ways to improve meat productivity and commercialization to address the various challenges of the global market due to pandemics. It is said that it is due to working on the strategy. We have made improvements to the feedlot production system, optimizing the country's livestock industry and ensuring better quality, better production and safer meat. For example, the mixing ratio of corn used for fattening feed and supplemental feed material is optimized to promote efficient nutrition of livestock. It also improved the productivity per unit of grazing farmland and reduced the amount of land required for breeding, enabling more efficient use of land.</p>  |
| Source / reference | <p>1) FAOSTAT-Land, Input and Sustainability-Land Use-Area-Agriculture (<a href="https://www.fao.org/faostat/en/#data/RL">https://www.fao.org/faostat/en/#data/RL</a>)</p> <p>2) FAOSTAT- Share of employment in agriculture (% of total employment) &amp; Share of female employment in agriculture (% of employment in agriculture) (<a href="https://www.fao.org/faostat/en/#data/OE">https://www.fao.org/faostat/en/#data/OE</a>)</p> <p>3) Agriculture, forestry, and fishing, value added (constant 2015 US \$) --Latin America &amp; Caribbean (<a href="https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart">https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart</a>)</p> <p>4) FAOSTAT-Government Expenditure-Share of Total Expenditure-Central Government (<a href="https://www.fao.org/faostat/en/#data/IG">https://www.fao.org/faostat/en/#data/IG</a>)</p> <p>5) FAOSTAT-Trade-Crops and livestock products-Import / Export Value-Agricultural Products (<a href="https://www.fao.org/faostat/en/#data/TCL">https://www.fao.org/faostat/en/#data/TCL</a>)</p> <p>6) PLAN NACIONAL DE PRODUCCIÓN, CONSUMO Y COMERCIO 2021-2022 (<a href="https://www.el19digital.com/app/webroot/tinyMCE/source/2021/Mayo/19May/PLAN%20NACIONAL%20DE%20PRODUCCION%2021-2022%20(08May21) 3.pdf">https://www.el19digital.com/app/webroot/tinyMCE/source/2021/Mayo/19May/PLAN%20NACIONAL%20DE%20PRODUCCION%2021-2022%20(08May21) 3.pdf</a>)</p> <p>7) Entrevista con Juan Velásquez, Director de CANICARNE, 2021, AmCham Nicaragua (<a href="https://www.amcham.org.ni/entrevista-con-juan-velasquez-director-de-canicarne/">https://www.amcham.org.ni/entrevista-con-juan-velasquez-director-de-canicarne/</a>)</p> |

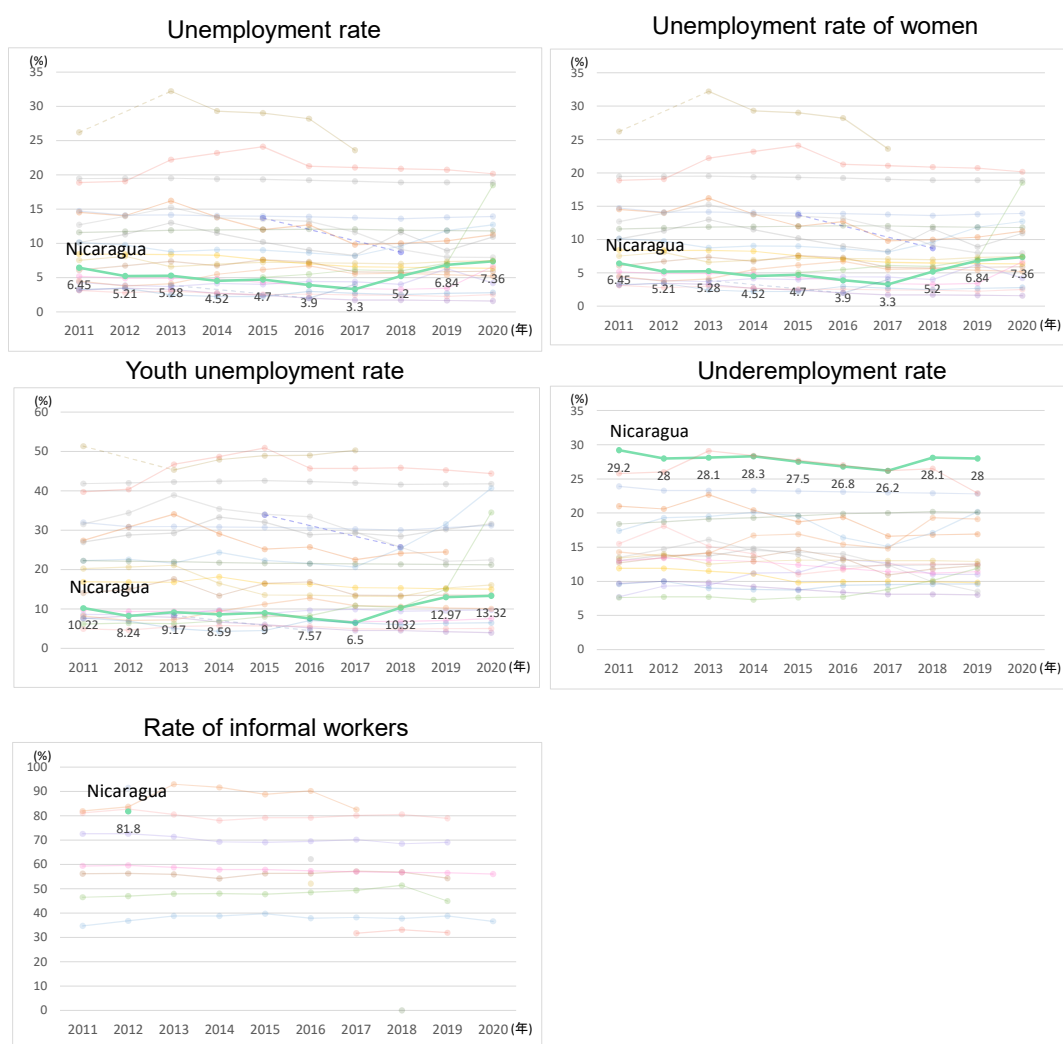
### 17.3.4 Private sector

Nicaragua has a medium-sized economy, but its GDP per capita is very low (21st). The unemployment rate continued to improve until 2017, but has deteriorated since then, reaching 6.84% in 2019. The underemployment rate and informal worker rate are high, and thus the employment situation is considered to be poor.

|              | Index                      | Value  | Ranking                 | Year | Source             |
|--------------|----------------------------|--------|-------------------------|------|--------------------|
| Productivity | GDP per capita (USD)       | 1,905  | 22 (Among 22 countries) | 2020 | World Bank         |
|              | GDP per worker (USD)       | 12,292 | 17 (Among 18 countries) | 2019 | World Bank         |
| Employment   | Minimum wage (USD / month) | 158    | 17 (Among 23 countries) | 2019 | ILO                |
|              | Unemployment rate          | 6.84   | 10 (Among 22 countries) | 2019 | Statista           |
|              | Female unemployment rate   | 5.16   | 7 (Among 22 countries)  | 2019 | The Global Economy |
|              | Youth unemployment rate    | 12.97  | 8 (Among 22 countries)  | 2019 | Statista           |
|              | Underemployment rate       | 28.28  | 18 (Among 18 countries) | 2019 | ILO                |
|              | Informal worker rate       | 81.8   | 10 (Among 12 countries) | 2012 | CEPAL              |

Source: Described in the table

Changes in unemployment rate, etc.



Source: World Bank, ILO, The Global Economy, etc.

### 17.3.5 Environment / disaster prevention

|                     | item   | data   | remarks                           |
|---------------------|--|--|-----------------------------------|
| environment         | Environmental agency                                     | Ministerio del Ambiente y los Recursos Naturales                                       |                                   |
|                     | Waste-related organizations                              | Dirección de Ornato, Municipio de Managua Nicaragua                                    |                                   |
|                     | Environmental Budget (USD)                               | 2019: 9,910,110<br>2020: 7,117,600<br>2021: 6,337,649<br>Three-year average: 7,788,453 | Average: 10th out of 23 countries |
|                     | Environmental budget per capita (2019-2021 average, USD) | 1.2 1.2  | 12th out of 23 countries          |
|                     | Budget ratio to national budget (2019)                   | ————   | not gotten                        |
|                     | Donor support status                                     | 6  | As of May 2021                    |
|                     | Renewable energy power generation (GWh) (2019)           | 609  | IRENA, 2021                       |
|                     | Geothermal power generation capacity (MWe)               | 2020: 159.00<br>2025 Forecast: 159.00  | WGC, 2020                         |
| Disaster prevention | Disaster prevention organization                         | Prevention, Mitigation and Attention of Disasters (SINAPRED)                           |                                   |
|                     | Donor support status                                     | 5 cases  | As of May 2021                    |
|                     | Number of natural disasters (2010-2020)                  | 12 cases<br>Major disasters: floods, earthquakes, droughts                             |                                   |
|                     | Number of victims (persons) per 100,000 population       | 16,990 people  | 6th out of 23 countries           |

Source: Survey Team

### 17.3.6 Governance and citizen security

| Item  | Overview   |           |                            |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
|---|--|-----------|----------------------------|------|----------------------------|--------------------------|-----------------------------|------|-----|------|-----|------|-----|-----------|------|-----|------|-----|------|-----|---|-----------------------------|------|-----|------|-----|------|-----|-----------|------|-----|------|-----|------|-----|--------------------------|-----------------------------|------|-----|------|-----|------|-----|-----------|------|-----|------|-----|------|-----|--------------------|-----------------------------|------|-----|------|-----|------|-----|-----------|------|-----|------|-----|------|-----|-------------|-----------------------------|------|-----|------|-----|------|-----|-----------|------|-----|------|-----|------|-----|-----------------------|-----------------------------|------|-----|------|-----|------|-----|-----------|------|-----|------|-----|------|-----|
| Political system                                      | Presidential Republic  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
| Election system                                       | The president and vice president are elected by general direct election. The term of office is 5 years.  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
| Legislative system                                    | Unicameral National Assembly   |           |                            |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
| Most recent / next legislative election               | November 7, 2021   |           |                            |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
| Appointment of judicial system / judge                | The Supreme Court justice is appointed by the National Assembly. The term of office is 5 years.  |           |                            |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
| Level of political stability and absence of violence  | What was originally low has worsened since 2018.   |           |                            |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
| “Worldwide Governance Indicators”                     | <p>Governance performance is low. Nicaragua has been in a very serious human rights crisis since hundreds of citizens performed street demonstrations in April 2018 in protest of social security reform. The socio-political and human rights crisis that has been affecting the country since April 2018 has been exacerbated by the hurricane damage in November 2020 and the impact of COVID-19, poverty, and unemployment in a wide area of the country. The result is an increase in inequality.</p> <table border="1"> <caption>Worldwide Governance Indicators Percentile Rank (0 to 100)</caption> <thead> <tr> <th>Indicator</th> <th>Country</th> <th>Year</th> <th>Percentile Rank (0 to 100)</th> </tr> </thead> <tbody> <tr> <td rowspan="6">Voice and Accountability</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~60</td> </tr> <tr> <td>2019</td> <td>~60</td> </tr> <tr> <td>2020</td> <td>~60</td> </tr> <tr> <td rowspan="3">Nicaragua</td> <td>2010</td> <td>~35</td> </tr> <tr> <td>2019</td> <td>~25</td> </tr> <tr> <td>2020</td> <td>~20</td> </tr> <tr> <td rowspan="6">Political Stability and Absence of Violence/Terrorism</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Nicaragua</td> <td>2010</td> <td>~30</td> </tr> <tr> <td>2019</td> <td>~25</td> </tr> <tr> <td>2020</td> <td>~20</td> </tr> <tr> <td rowspan="6">Government Effectiveness</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Nicaragua</td> <td>2010</td> <td>~25</td> </tr> <tr> <td>2019</td> <td>~25</td> </tr> <tr> <td>2020</td> <td>~20</td> </tr> <tr> <td rowspan="6">Regulatory Quality</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Nicaragua</td> <td>2010</td> <td>~35</td> </tr> <tr> <td>2019</td> <td>~35</td> </tr> <tr> <td>2020</td> <td>~30</td> </tr> <tr> <td rowspan="6">Rule of Law</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Nicaragua</td> <td>2010</td> <td>~25</td> </tr> <tr> <td>2019</td> <td>~25</td> </tr> <tr> <td>2020</td> <td>~20</td> </tr> <tr> <td rowspan="6">Control of Corruption</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Nicaragua</td> <td>2010</td> <td>~35</td> </tr> <tr> <td>2019</td> <td>~35</td> </tr> <tr> <td>2020</td> <td>~30</td> </tr> </tbody> </table> | Indicator | Country                    | Year | Percentile Rank (0 to 100) | Voice and Accountability | * Latin America & Caribbean | 2010 | ~60 | 2019 | ~60 | 2020 | ~60 | Nicaragua | 2010 | ~35 | 2019 | ~25 | 2020 | ~20 | Political Stability and Absence of Violence/Terrorism | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Nicaragua | 2010 | ~30 | 2019 | ~25 | 2020 | ~20 | Government Effectiveness | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Nicaragua | 2010 | ~25 | 2019 | ~25 | 2020 | ~20 | Regulatory Quality | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Nicaragua | 2010 | ~35 | 2019 | ~35 | 2020 | ~30 | Rule of Law | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Nicaragua | 2010 | ~25 | 2019 | ~25 | 2020 | ~20 | Control of Corruption | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Nicaragua | 2010 | ~35 | 2019 | ~35 | 2020 | ~30 |
| Indicator   | Country  | Year      | Percentile Rank (0 to 100) |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
| Voice and Accountability                              | * Latin America & Caribbean  | 2010      | ~60                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
|   |  | 2019      | ~60                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
|   |  | 2020      | ~60                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
|   | Nicaragua  | 2010      | ~35                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
|   |  | 2019      | ~25                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
|   |  | 2020      | ~20                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
| Political Stability and Absence of Violence/Terrorism | * Latin America & Caribbean  | 2010      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
|   |  | 2019      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
|   |  | 2020      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
|   | Nicaragua  | 2010      | ~30                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
|   |  | 2019      | ~25                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
|   |  | 2020      | ~20                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
| Government Effectiveness                              | * Latin America & Caribbean  | 2010      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
|   |  | 2019      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
|   |  | 2020      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
|   | Nicaragua  | 2010      | ~25                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
|   |  | 2019      | ~25                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
|   |  | 2020      | ~20                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
| Regulatory Quality                                    | * Latin America & Caribbean  | 2010      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
|   |  | 2019      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
|   |  | 2020      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
|   | Nicaragua  | 2010      | ~35                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
|   |  | 2019      | ~35                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
|   |  | 2020      | ~30                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
| Rule of Law   | * Latin America & Caribbean  | 2010      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
|   |  | 2019      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
|   |  | 2020      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
|   | Nicaragua  | 2010      | ~25                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
|   |  | 2019      | ~25                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
|   |  | 2020      | ~20                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
| Control of Corruption                                 | * Latin America & Caribbean  | 2010      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
|   |  | 2019      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
|   |  | 2020      | ~55                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
|   | Nicaragua  | 2010      | ~35                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
|   |  | 2019      | ~35                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
|   |  | 2020      | ~30                        |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
| Global freedom status                                 | 30/100 points (citizen rights: 10/40 points, political rights: 20/60 points) Classified as "non-free country" (Freedom House 2021). Since the inauguration of the Ortega administration in 2007, the level of freedom of citizens and the transparency of elections has decreased (IDEA International 2020).   |           |                            |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
| Corruption Perception Index (CPI)                     | 159/180th place, 22/100 points (Transparency International 2020)   |           |                            |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
| E-government development index                        | It is lower than the average level in the region, especially behind the development of communication infrastructure. Although digital national IDs are issued, 10.24% (45,000 or more) of the people are not given national IDs.   |           |                            |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
| Rule of law   | The level of "rule of law" is low. Unjustified crackdowns have been carried out against anti-government protests and opposition parties.   |           |                            |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |
| Citizen security                                      | Citizen security is one of the best ranked among Central American and Caribbean countries. The homicide rate has decreased since 2009. From 14 / 100,000 (2009) to 7.2 / 100,000 (2016) (UNODC 2021). Since 2018, illegal guns have been on the market, and as a result, there are concerns about the deterioration of citizen security.   |           |                            |      |                            |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |           |      |     |      |     |      |     |

Source: Survey Team

## 17.3.7 DX / Innovation

|  |  |   |
|--|--|---|
| <p>Basic indicators and statistics</p>   | <p>E-Government Ranking 1): 123rd<br/>         Mobile connection index 2): 52.5<br/>         Network Infrastructure Index: 57.3<br/>         Internet user rate 41.7<br/>         Mobile connection rate 118.0<br/>         Fixed broadband rate 3.3<br/>         Increase rate of Internet users 15.0 (2021/2020)</p> | <p>Radars chart of e-government ranking</p> |
| <p><b>Communication network</b></p>  |  |   |
| <p>Nicaragua's landline and mobile phone penetrations 3) and mobile phones 4) are 3.2% (2020) and 90.2% (2020), respectively, below the Latin American and Caribbean averages of 15% (2020) and 100.4% (2020), respectively. National economic scale 5) (GDP 12,621 USD Million / Latin American and Caribbean average GDP 146,609 USD Million) is directly linked to the current state of underdevelopment in the telecommunications sector. According to 2015 data6), about 750 (USD Million) infrastructure investment is made (5.9% of GDP), about 60% of which is allocated to the public sector, and about 2.4% of GDP is allocated to the telecommunications sector. The investment amount was 50 (USD Million). Inadequate infrastructure equipment further promoted disparities between urban and rural areas, with fixed-line telephone penetration of approximately 12.7% in urban areas and less than 0.4% in rural areas (2015) 7). In August 2016, the government started an ICT development project8) with a loan from the World Bank with the aim of expanding broadband access. The main purpose is to link it with the Caribbean submarine cable to promote economic development in the eastern Caribbean region. Private telecommunications company América Móvil (brand name Claro) has an advantage in all telecommunications markets, including fixed-line, mobile, broadband and cable TV 9). Telefónica, the only company to compete with Claro in the fixed-line and mobile markets, sold its business in Nicaragua to Millicom in 2019, and Telefónica's Movistar is now entering the market under the Millicom brand name Tigo. Tigo occupies almost one-third of the mobile market, but has a fixed-line market share of only about 10%.</p>   |  |   |
| <p><b>National Strategy for Digital Transformation</b></p>   |  |   |
| <p>The National Development Program for Human Development 2018-2021 10) stipulates a national development program for the telecommunications sector, which focuses on the following four items. 1) Information and communication technology policies encouraging the development of infrastructure and technical equipment 2) Expanding the bandwidth of high-speed Internet to improve services and access throughout the country, 3) Modernizing and organizing the domestic and international postal networks of post offices Reorganization, promotion of operational quality and diversification of services, 4) establishment of new standards and their research and development to promote the renewal and development of the telecommunications field. As a presidential directive, a law initiative called the Special Cybercrime Law has been launched, and the National Cybersecurity Strategy 2020-202511) has been approved. According to this decree, a promotion action plan is being prepared as a national strategy led by the Ministry of Foreign Affairs and the Telecommunications and Postal Research Institute (TELCOR). The main objective of this strategy is to use ICT tools to promote national peace, stability, security and sustainable development, and to ensure cyberspace sovereignty and credibility.</p>  |  |   |
| <p><b>Characteristic efforts</b></p>   |  |   |
| <p>The government is actively engaged in national education, such as implementing a project to improve education standards by financing from the World Bank12). Due to this COVID-19 pandemic, the class participation rate, which was 70.1% in March 2020, dropped to 45.3% in June of the same year, which had a serious impact on national education. So MINED has taken steps to educate the entire public school, including webinars, video conferences, large open online courses, and the development of intensive primary and secondary education training using a repository of digital resources accessible to MINED's portal. And seeking for strengthening actions in learning. As part of this, we are promoting distance learning through the use of educational TV "Teleclasses" and communication platforms such as WhatsApp and Messenger, as well as a comprehensive strategic plan that packages priority curriculums in the most vulnerable and poorest regions. Is also being deployed.</p>   |  |   |
| <p><b>source</b></p>   |  |   |
| <p>131. E-Gov-Index: a composite indicator that consists of three indexes (Online Service Index, Telecommunication Infrastructure Index and Human Capital Index), which are equally weighted. It ranges from 0 to 1, with 1 being the most developed.<br/>         132. Mobile Connectivity Index: an input index developed by GSMA to measure the performance against the four key enablers of mobile internet adoption – infrastructure, affordability, consumer readiness and content. (https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2016/06/Mobile-Connectivity-Launch-Report.pdf)<br/>         133. Fixed telephone subscriptions (per 100 people) –Nicaragua, Latin America &amp; Caribbean https://data.worldbank.org/indicator/IT.MLT.MAIN.P2?locations=ZJ-NI<br/>         134. Mobile cellular subscriptions (per 100 people)-Latin America &amp; Caribbean, Nicaragua https://data.worldbank.org/indicator/IT.CEL.SETS.P2?locations=ZJ-NI<br/>         135. GDP (current US \$)-Latin America &amp; Caribbean, Nicaragua https://data.worldbank.org/indicator/NY.GDP.MKTP.CD?locations=ZJ-NI<br/>         136. Country Infrastructure Briefs: Central America, Mexico, Panama, and Dominican Republic https://publications.iadb.org/publications/english/document/Country_Infrastructure_Briefs_Central_America_Mexico_Panama_and_the_Dominican_Republic_en_en.pdf<br/>         137. IMPLEMENTATION COMPLETION AND RESULTS REPORT (IDA-41680, IDA-51300) https://documents1.worldbank.org/curated/en/105801468185361378/text/ICR3456-P089989-Box394855B-PUBLIC-disclosed-2-4-16.txt<br/>         138. World Bank Supports Improved Broadband and New ICT Industries for Nicaragua https://www.worldbank.org/en/news/press-release/2016/08/17/banco-mundial-apoya-banda-ancha-mejorada-y-nuevas-industrias-tic-para-nicaragua<br/>         139. PANORAMA DE MERCADO – NICARAGUA</p> |  |   |

|      |  |
|------|--|
|      | <a href="https://www.telesemana.com/panorama-de-mercado/nicaragua/">https://www.telesemana.com/panorama-de-mercado/nicaragua/</a>  |
| 140. | Nacional Program of Human Development 2018-2021<br><a href="http://observatorioplanificacion.cepal.org/sites/default/files/plan/files/Nicaragua.EJES%20DEL%20PROGRAMA%20NACIONAL%20DE%20DESARROLLO%20HUMANO.pdf">http://observatorioplanificacion.cepal.org/sites/default/files/plan/files/Nicaragua.EJES%20DEL%20PROGRAMA%20NACIONAL%20DE%20DESARROLLO%20HUMANO.pdf</a>     |
| 141. | National Cybersecurity Strategy 2020-2025<br><a href="http://legislacion.asamblea.gob.ni/normaweb.nsf/b92aaca87dac762406257265005d21f7/bed236921a6bc847062585f30068db3e?OpenDocument">http://legislacion.asamblea.gob.ni/normaweb.nsf/b92aaca87dac762406257265005d21f7/bed236921a6bc847062585f30068db3e?OpenDocument</a>   |
| 142. | Nicaragua COVID-19 Education Sector Response (P174677) <a href="https://www.globalpartnership.org/sites/default/files/document/file/2020-11-application-program-document-COVID-19-accelerated-funding-nicaragua.pdf">https://www.globalpartnership.org/sites/default/files/document/file/2020-11-application-program-document-COVID-19-accelerated-funding-nicaragua.pdf</a> |

### 17.3.8 Infrastructure and Energy

| Transport                                 |   |
|---|---|
| Overview                                  | Inland transportation is mainly by car. There are domestic air routes. There was also a railroad, but it has stopped since 2001.  |
| Leadership governance                     | Ministry of Transport and Infrastructure (MTI)  |
| Major development partners                | JICA / WB / UNDP / IADB   |
| Energy and electricity                    |   |
| Overview                                  | 42% of primary energy is petroleum and the others are renewable (mainly bio and geothermal). The self-sufficiency rate of primary energy is 57% in 2018. 57% of the electrical energy mix is renewable energy (mainly bioenergy, hydropower, wind). |
| Carbon neutral national plan              | No information.<br>Target: Increase the amount of electricity generated by renewable energy to 60-65% by 2030 (NDC in 2020).  |
| Leadership governance and utility company | Ministry of Energy and Mines (MEM)<br>DISNORTE-DISSUR   |
| Major development partners                | JICA / IADB / GIZ   |

Source: JICA Study Team with reference to various websites of the government organization and international organization (WB / IEA / IRENA / US DOE).

### 17.3.9 Tourism

International tourism revenue is small for the number of international tourists arriving

|   |  |  |
|---|--|--|
| Number of international tourist arrivals (2019) |  | 1,295 thousand   |
| International Tourism Receipts (2019)           |  | USD 515 million  |
| Tourism Competitiveness Ranking (2019)          |  | 3.5 out of 7 (91st out of 140 countries)<br>Highly rated field: International openness (4.2 out of 7 points, 21st out of 140 countries)<br>Low evaluation field: Business environment (3.4 points out of 7 points, 132nd out of 140 countries) |
| Tourism Dependency Index (2019)                 |  | 11.0 (69th out of 166 countries)   |
| Government of Japan policy                      | Number of JICA projects in the last 10 years   | none   |
|   | References to the Country Assistance Policy  | none   |
|   | Interest in pilot projects   | N / A  |
| Tourism industry vulnerability                  | Contribution of Travel & Tourism to GDP (2019)   | 10.1% (18th out of 23 countries)   |
|   | Contribution of Travel & Tourism to employment (2019)  | 10.4% (18th out of 23 countries)   |
|   | Ratio of international spending (2019)   | 48% (18th out of 23 countries)   |
|   | Top 3 nationalities of visitors (2019)   | USA (12.54%)<br>Honduras (12.27%)<br>Costa Rica (10.62%)   |
| Importance of tourism                           | Ratio of the budget amount of tourism-related ministries to the national budget amount (2019)            | N / A  |
|   | Whether or not it is mentioned as a priority sector in the National Economic and Social Development Plan | Yes<br>Plan name: Ejes del Programa Nacional de Desarrollo Humano 2018-2021<br>Reference example: As one of the Desarrollo Socioprodutivo, G. Turismo (p. 31)  |
|   | Existence of effective national tourism policies / strategies / plans                                    | none   |

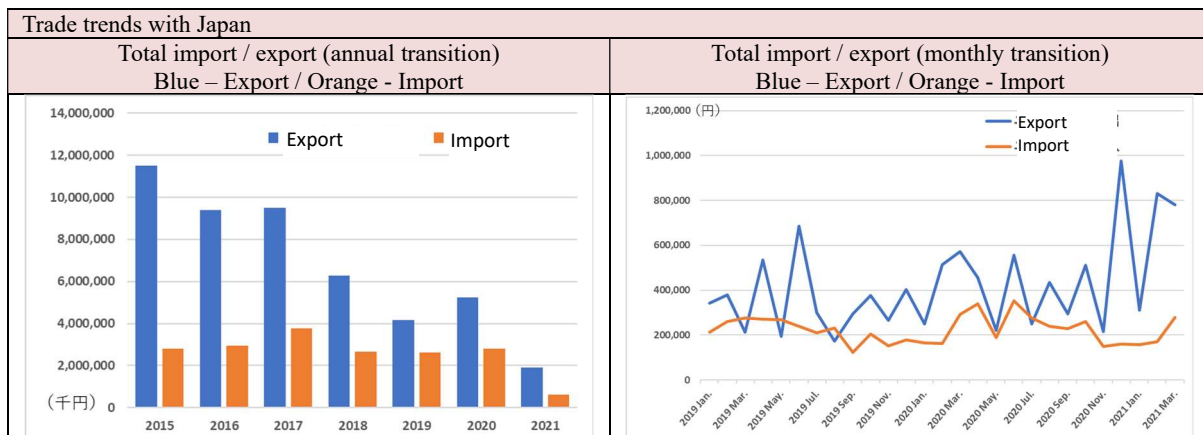


|  |   |   |
|--|---|---|
| Impact of COVID-19   | Changes in the contribution of Travel & Tourism to GDP (2019 → 2020)        | -48.3% (18th out of 23 countries)   |
|  | Changes in the contribution of Travel & Tourism to employment (2019 → 2020) | -26.8% (12th out of 23 countries)   |
| Number of government support measures for the tourism sector |   | 4 (Monetary policy: 2, Resumption of tourism: 1, Health and safety protocol: 1) |

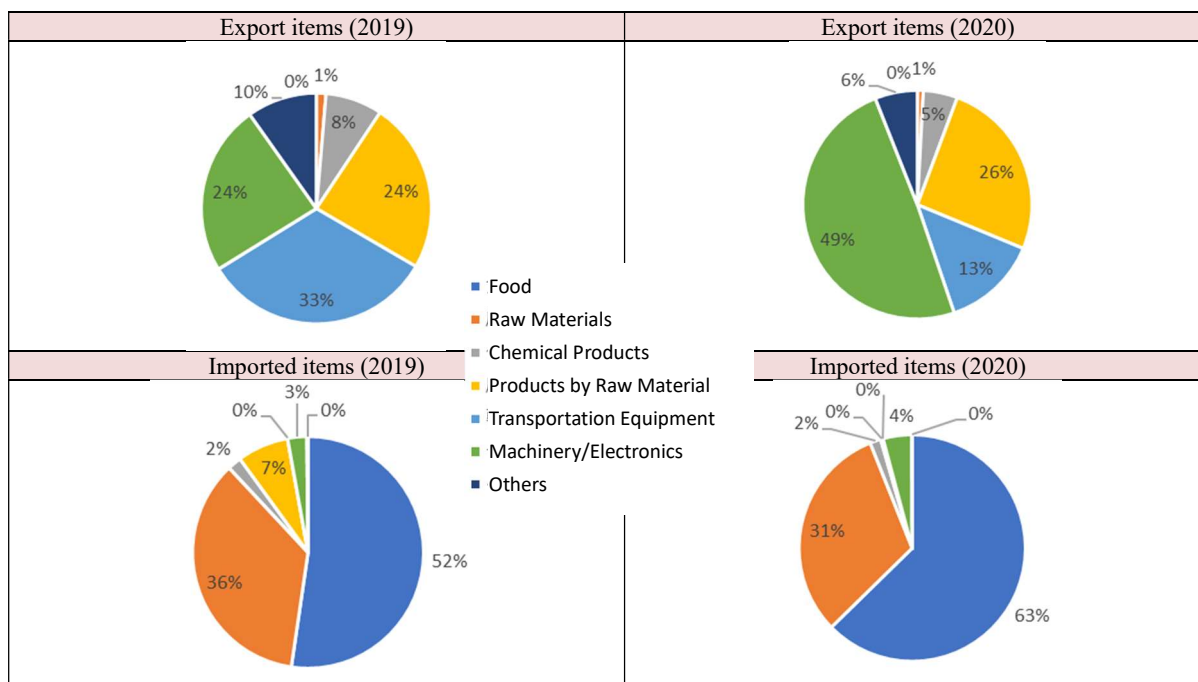
Source: Survey Team

### 17.3.10 Public-private partnership

| item   |  | Contents    |
|--|--|-------------|
| No. of JICA Public-Private Partnership Projects (After 2012)                 | Cooperation preparatory survey (overseas investment and financing) (former PPP infrastructure project)           | 0 cases     |
|  | Overseas investment and loan   | 0 cases     |
|  | SME Partnership Promotion Survey (support for Small-sized Enterprise)  | 0 cases     |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for small- and medium- sized enterprise) | 1           |
|  | SDGs Business Verification Survey with Private Sector (support for small- and medium- sized enterprise)          | 0 cases     |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for large enterprise)                    | 0 cases     |
|  | SDGs Business Verification Survey with Private Sector (support for large enterprise)                             | 0 cases     |
| Total number of Japanese private companies entering the market (2019 survey) | Total number of business locations   | 6 companies |
|  | Overseas branches of Japanese companies,   | 0 companies |
|  | Local corporations wholly owned by Japanese companies and their branches   | 1 company   |
|  | Branch offices wholly owned by Japanese companies and their branches   | 3 companies |
|  | joint ventures (local corporations in which Japanese companies have a direct or indirect stake of 10% or more)   | 0 companies |
|  | joint ventures (Branch offices in which Japanese companies have a direct or indirect stake of 10% or more)       | 1 company   |
|  | companies established overseas by Japanese nationals (in which Japanese nationals have a stake of 10% or more)   | 1 company   |
|  | Unknown classification   | 0 companies |
| Number of Japanese residents (2020 survey)                                   | Total  | 81 people   |
|  | Long-term residents  | 81 people   |
|  | Permanent resident   | 0 people    |
| Business Environment   | Doing Business 2020 Rank   | 142nd       |
| PPP Project  | Existence of PPP law scheme  | ○           |
|  | PPP project with Japanese companies  | 0 cases     |







### Gathering information about the PPP system

| N°  | Task Item  | Inquiries/comments/status<br>Title of submitted file   | Source/URL  |
|-----|--|--|---|
| 1   | <b>PRIORITY 4_PPP Sector</b>   |  |   |
|     | PPP Projects in selective countries  |  |   |
| 1.1 | PPP rules and regulations in Central America and Caribbean Countries       |  | All below can be useful   |
| A   | PPP laws and Regulations if there is any, when, and how                    | Law of Public Private Association<br>Regulation of the APP Law   | <a href="http://www.snip.gob.ni/Docs/leyes/Ley935.pdf">http://www.snip.gob.ni/Docs/leyes/Ley935.pdf</a><br><a href="http://www.snip.gob.ni/Docs/leyes/ReglamentoApp.pdf">http://www.snip.gob.ni/Docs/leyes/ReglamentoApp.pdf</a>  |
| B   | PPP Unit Organization if there is any, how structured                      | There is no PPP Unit Organization but the General Directorate of Public Investments is in charge of guaranteeing the application of the PPP Law (Public Private Association Law Article 6 - page 6 )   | <a href="http://www.snip.gob.ni/Docs/leyes/Ley935.pdf">http://www.snip.gob.ni/Docs/leyes/Ley935.pdf</a>   |
| C   | PPP sectors in what sectors are the PPPs allowed                           | No limitation is specified for any particular sector. According to article 1 of the law, it is applicable to projects and contracts developed under the Public Private Partnership scheme for the provision of infrastructure and public services, as well as to public sector entities.   | <a href="http://www.snip.gob.ni/Docs/leyes/Ley935.pdf">http://www.snip.gob.ni/Docs/leyes/Ley935.pdf</a>   |
| D   | Proposal Types (Solicited or Unsolicited) unsolicited                      | Both types are accepted (Regulation of the APP Law - Chapter II and III - page 2272 to 2274  | <a href="http://www.snip.gob.ni/Docs/leyes/ReglamentoApp.pdf">http://www.snip.gob.ni/Docs/leyes/ReglamentoApp.pdf</a>   |
| E   | PPP Forms BOT, BTO, DB, ,,, what form are allowed                          | General Directorate of Public Investments will be in charge of preparing and coordinating plans, policies and regulations for the development and proper functioning of the public-private contracting modality governed by this Law, ensuring compliance and correct use and advise any State institution that requires it in its implementation. (Public Private Association Law - Article 7 Page 7)   | <a href="http://www.snip.gob.ni/Docs/leyes/Ley935.pdf">http://www.snip.gob.ni/Docs/leyes/Ley935.pdf</a>   |
| F   | PPP types Availability payment, service purchase                           | The PPP types are Self-sustaining projects and Subsidized projects (Public Private Association Law - Article 5 Page 6 and 7)   | <a href="http://www.snip.gob.ni/Docs/leyes/Ley935.pdf">http://www.snip.gob.ni/Docs/leyes/Ley935.pdf</a>   |
| G   | PPP Project Trends how much PPP projects in the last 10 years              | 9 (2010 to 2020)<br>- Eolico Amayo Wind Farm (Phase II) (2010)<br>- Polaris Geothermal Power Plant Phases I + II (2010)<br>- La Fe San Martin Wind (2011)<br>- Hidropantasma (2011)<br>- Inversiones Hidroelectricas SA - Small Hydro (2012)<br>- Globeleq - Eolo Wind Project (2012)<br>- Albainsa - Alba Rivas Wind Farm (2012)<br>- Green Power Biomass Power Plant (2014)<br>- Xinwei Telecom Nicaragua (2015)<br><br>See file "210520_PPP Database" | <a href="https://ppi.worldbank.org/en/visualization/#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true">https://ppi.worldbank.org/en/visualization/#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true</a> |
| H   | Participation of Japanese firms in PPP Projects if any (check news source) | An information search was carried out but no relevant information could be found.  |   |
|     | Any notable points for each country if any                                 |  |   |

Source: Survey Team

## 18. Panama

### 18.1 Country overview (basic information)

#### 18.1.1 Basic information

Republic of Panama (Spanish: República de Panamá), commonly known as Panama, is a republican nation located on the border between North and South America. It borders Costa Rica to the northwest, Colombia to the southeast, the Caribbean Sea to the north, and the Pacific Ocean to the south. The country's location is the junction of the Americas, the Pacific Ocean, and the Atlantic Ocean. Due to its geographical importance, it has been a major role in the movement of people and international politics in addition to trade since the arrival of the Spaniards, and because of its importance, the Panama Canal, which runs through the Central American Isthmus, runs through it. According to IMF estimates, Panama's GDP in 2013 was \$ 40.5 billion, with per capita GDP of \$ 10,876, the highest of the seven Central American countries, slightly above Mexico. According to the World Bank definition, gross national income per capita in 2019 is \$ 14,950, making it the only high-income country in the seven countries (more than \$ 12,536 as of 2019). It relies entirely on the US dollar, the currency of the United States, and relinquishes its currency sovereignty. The central bank (Panama National Bank) exists, but does not have the right to issue banknotes.

#### 18.1.2 General circumstances

|             |   |                 |  |
|-------------|---|-----------------|--|
| 1 area      | 75,517 square kilometers (slightly smaller than Hokkaido) | 2 Population    | 4.22 million people (2019 Board of Audit)  |
| 3 Capital   | Panama City   | 4 ethnic groups | Mixed race 70%, indigenous people 7%, etc. |
| 5 languages | Spanish   | 6 religion      | Catholic                                   |

Source: Ministry of Foreign Affairs HP Panama Republic Basic Data

#### 18.1.3 Economic overview

|                            |   |                              |   |
|----------------------------|---|------------------------------|---|
| 1 Major industry           | Tertiary industry (Panama Canal operation, relay trade via Colon Free Zone, international financial center, flag of convenience system, tourism, commerce, real estate, etc. account for about 70% of GDP)  | 2 GDP<br>3 GNI / person      | \$ 66.8 billion (2019 Board of Audit)<br>US \$ 30,610 (2019, WDI) |
| 4 Economic growth rate     | 3.0% (2019 Board of Audit)  | 5 Unemployment rate          | 18.57.1% (2019 Statista)  |
| 6 Price increase rate      | -0.4% (2019 Board of Audit)   |                              |   |
| 7 Total trade amount       | Export (FOB): \$ 670 million (2018 Board of Audit)<br>Import (CIF): \$ 13.23 billion (2018 Board of Audit)  |                              |   |
| 8 Major Trade Items (2018) | Export: Bananas, shrimp and other fish and shellfish, scrap metal, sugar, fish meal and fish oil<br>Import: Fuels such as gasoline, automobiles, pharmaceuticals, steel products, building materials for housing  |                              |   |
| 9 Major trading partners   | Exports: USA, Netherlands, China, India, Costa Rica, Taiwan, Spain, Thailand, Vietnam, Nicaragua<br>Imports: USA, China, Mexico, Costa Rica, Spain, Colombia, Germany, Japan, Brazil, Guatemala   |                              |   |
| 10 currencies              | Balboa (coins only), US dollars   | 11 Foreign currency reserves | na  |
| 12 National budget         | USD23,669,270,825 (2019)  | 13 External debt balance     | \$ 36.1 billion (Ministry of Economy and Finance, 2020)           |
| 14 Economic overview       | (1) Due to geographical superiority, dollar-ized economy, introduction of various systems to encourage overseas investment, etc., each sector such as canals, ports, colon free zone, finance, tourism, construction, real estate and logistics has developed. Tertiary industry accounts for about 70% of GDP.<br>(2) On the other hand, because the primary and secondary industries are not well developed, most of the consumer goods and production goods such as processed foods, oil, medical care, miscellaneous goods, and industrial products depend on imports, and trade. The balance is constantly in the red.<br>(3) Although the Panama economy in recent years fell to 1.2% due to the effects of the global economic crisis in 2009, the GDP growth rate was in 2010 against the backdrop of favorable trends in the construction, logistics, commerce and real estate sectors. From 2017, it entered a high-growth period |                              |   |

|  |   |
|--|---|
|  | <p>of over 5%. After that, economic growth slowed to 3.6% in 2018 due to the impact of large-scale construction strikes and 3.0% in 2019. The Cortiso administration, which was born in July 2019, worked to reduce the debt that had swelled during the previous administration and to restore fiscal health, and aimed to rebuild the economy. However, the economic growth rate in 2020 is expected to be significantly negative due to the impact of the pandemic caused by the new coronavirus that occurred in 2020, which has severely affected the economy, employment, and finances.</p> <p>(4) The conclusion of trade agreements with other countries is also being actively promoted, and the bilateral free trade agreement (FTA) came into effect with El Salvador and Taiwan under the Moscoso administration, and then under the Trihos administration. FTA negotiations with Singapore, Chile, Costa Rica, Honduras and Guatemala, and under the Martinelli administration with Nicaragua, Peru, the United States and Canada, and with Colombia and Mexico to join the Pacific Alliance. Summarized. Under the Valera administration, FTAs with Israel and South Korea have been approved, and negotiations with China have begun.</p> <p>(5) The number of vessels passing through the Panama Canal (fiscal year 2020) is 13,369. The ranking of countries of use on a weight basis (fiscal year 2020) is in the order of the United States, China, Japan, Chile, and South Korea. The operation of the extended Panama Canal, where the third lock was constructed on the Pacific side and the Atlantic side, started in June 2016. Japan financed expansion work with \$ 800 million through JBIC.</p> |
|--|---|

Source: Ministry of Foreign Affairs HP Panama Republic Basic Data

## 18.1.4 Country-specific development cooperation policy

### (1) Government of Japan Development Cooperation Policy by Country

**Table 18-1 Overview of Japan's ODA to Panama**

|  |  |
|--|--|
| <b>1. 1. Overview</b>  |  |
| Japan's economic cooperation with Panama began in 1979 and began in earnest in the 1980s. In 1989, the Japan Overseas Cooperation Volunteers (JOCV) dispatch arrangement was signed, and dispatch began in 1991. Grant-in-aid for human security is centered on grassroots and human security grant-aid for human security, and there have been three ODA loans so far.  |  |
| <b>2. 2. Aim of development cooperation</b>  |  |
| Japan is the world's number one user of the Panama Canal (based on usage fees), and many Japanese companies are expanding into it. Panama is Japan's second largest export partner in Latin America, and has close economic ties. Therefore, the stability of the country's political economy is also important for Japan. In the future, the so-called shale gas revolution is expected to export a large amount of energy from the United States to the East Asian region, and the expanded Panama Canal is expected to become even more important, so we aim to become a global strategic base. Further enhancement of logistics and transportation services in the country will continue to be extremely important for Japan. In addition, although Panama has reached an economic level that exceeds the level of middle-income countries, the economic infrastructure development in the capital Panama City, environmental conservation to support sustainable growth, and the economic disparity between the metropolitan area and rural areas It has issues such as expansion. Under these circumstances, continuing support for Japan to support the sustainable growth of Panama will not only solve its development issues and further strengthen Japan-Panama relations, but also from the perspective of Japan's energy security. It is also significant from. |  |
| <b>3. 3. Basic policy</b>  |  |
| By cooperating in the development of an environmentally friendly economic infrastructure, we will support the sustainable growth of Panama, and support Panama's efforts to respond to the growing economic disparity problem and promote human resource development.  |  |
| <b>4. Priority areas</b>   |  |
| <p>(1) Sustainable economic growth: We will improve the living and sanitary environment in the ever-growing Panama metropolitan area and provide support for the development of an economic infrastructure to support sustainable economic growth. In addition, we will support various efforts being implemented in Panama in the fields of waste management, conservation of the natural environment, establishment of community disaster prevention, fishery resource management, etc.</p> <p>(2) Disparity correction: In Panama, the economic disparity between the metropolitan area and rural areas, poverty in rural areas, and the difference between rich and poor in urban areas are still significant, so development in rural areas and support for small and medium-sized enterprises in urban areas. , Human resource development for the poor, support for vulnerable groups such as persons with disabilities, women and children.</p>  |  |

Source: Ministry of Foreign Affairs HP Panama Country Data Collection 2017

**Table 18-2 National Development Cooperation Policy for Panama (September 2018)**

|  |   |
|--|---|
| <b>3. 3. Priority field (medium goal)</b>                        |   |
| (1) Environmentally friendly economic infrastructure development | Support for economic infrastructure development such as improvement of urban transportation function, cooperation for environmentally friendly economic infrastructure development, various efforts as a response to the impact of climate change (watershed management to secure |

|                            |  |
|----------------------------|--|
|                            | water sources, improvement of community disaster prevention capabilities), Fisheries resource management, etc.).   |
| (2) Correcting disparities | We will provide support that contributes to the correction of disparities, such as regional / rural development, improvement of education standards, support for vulnerable groups such as people with disabilities, women, and children, and human resource development for the poor. |

## (2) Survey on COVID-19 by development partners

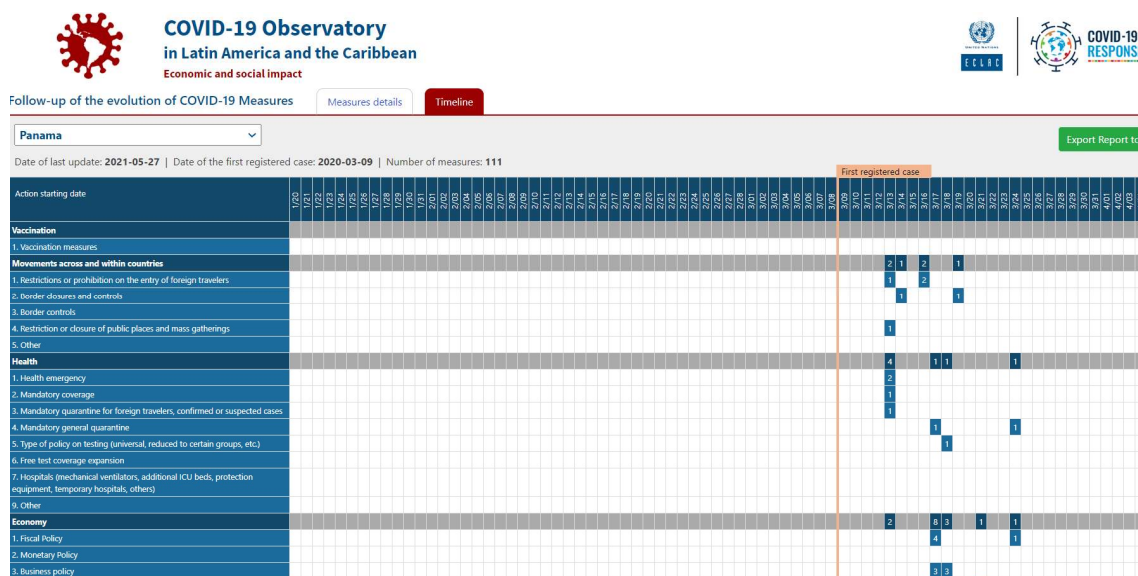
We extracted sector names and specific quantitative figures that have a large impact on the country-specific analysis described in various reports of development partners. Reports from the World Bank, OECD, BCIE, SICA, and the Ministry of Economy, Trade and Industry of Japan suggest the importance of introducing digitalization and innovation (Fintech, Aggrotech, Autotech, etc.), and incorporate the survey results of these development partners. I arranged it accordingly.

World Bank: "Growth and Revitalization" 2021 Semi-Annual Economic Report (March 2021)

- ✓ OECD: COVID-19 in LAC, Regional socio-economic implications and policy priorities (December 2020)
- ✓ BCIE: Impacto Económico del COVID-19 (April 2020)
- ✓ SICA: Estimación del Impacto Económico del COVID-19 en Centroamérica y República Dominicana (April 2020)
- ✓ Ministry of Economy, Trade and Industry of Japan: "Economic and Industrial Policy Based on the Impact of the New Corona Virus" (June 2020), Accelerating Digitization and Onlineization, Gig Economy, Innovation in the Transition to a New Everyday Life 1) Medical care / health, 2) Digital: Infrastructure development premised on the arrival of a digital society, 3) Green: Response to climate change problems, Energy security, 4) Emphasizes resilience.

### 18.1.5 Policies for COVID-19 measures taken by governments of each country

Various policies for COVID-19 taken by the government are described on the ECLAC homepage "COVID-19 Observatory" by country, time series, and field, and can be analyzed.



Source: <https://cepalstat-prod.cepal.org/forms/covid-countrysheet/index.html?country=PAN>

In this survey, the 57 policies implemented in Panama posted on this website were classified by sector as much as possible.

#### 1) Infection spread and alleviation of aggravation and death

No material was available.

## 2) Support for affected industries and people

**Table 18-3 Support for Affected Industries and People (Panama)**

| Various government policies (COVID-19 Observatory for LAC) |  |    |  |
|--|--|----|--|
| Socioeconomic policy                                       |  | 24 |  |
| Health care & nutrition                                    |  | 10 |  |
| Education  |  | 2  |  |
| Agriculture & rural development                            |  | 0  |  |
| Private sector   |  | 12 |  |
| Environment & disaster prevention                          |  | 0  |  |
| Governance and social security                             |  | 3  |  |
| DX and innovation  |  | 1  |  |
| Infrastructure & energy                                    |  | 0  |  |
| Tourism  |  | 0  |  |
| PPP  |  | 0  |  |
| Others (b)   |  | 5  |  |
| total  |  | 57 |  |

Source: Survey Team

## 3) Arrangement of various policies for COVID-19 taken by the government

COVID-19 Observatory for Latin America and Caribbean (ECLAC) organized by governments

**Table 18-4 Government-directed COVID-19 Policy Categories (Panama)**

### Follow-up of the evolution of COVID-19 Measures

| Vaccination   | Economy  | Social protection   |
|---|--|---|
| 1. Vaccination measures   | 1. Fiscal Policy   | 1. Cash transfers (new transfers, increase in existing transfers, expansion of cash transfers to new recipients, early disbursement of transfers) |
| <b>Movements across and within countries</b>  | 2. Monetary Policy   | 2. Food transfers / In-kind transfers   |
| 1. Restrictions or prohibition on the entry of foreign travelers  | 3. Business policy   | 3. Guarantee of basic services  |
| 2. Border closures and controls   | 4. Restriction of economic activity (including shops and shopping centers)                             | <b>Education / schools</b>  |
| 3. Border controls  | 5. Price and quantity controls   | 1. Suspension of classes  |
| 4. Restriction or closure of public places and mass gatherings  | 6. Economic Stimulus (includes aggregate value of fiscal measures and separately of credit guarantees) | 2. Provision of tools for distance learning (online platforms, TV, radio, distance-learning materials)  |
| 5. Other  | 7. Regulation of the personal hygiene and cleaning products market                                     | 3. Maintenance of school feeding programme (indicating under which modalities)  |
| <b>Health</b>   | 8. Debt relief and suspension of credit payments (individuals, microentrepreneurs)                     | <b>Gender</b>   |
| 1. Health emergency   | 9. Other   | 1. Gender-based violence against women  |
| 2. Mandatory coverage   | <b>Labor</b>   | 2. Care economy   |
| 3. Mandatory quarantine for foreign travelers, confirmed or suspected cases                                   | 1. Labor Protection  | 3. Employment and income generation   |
| 4. Mandatory general quarantine   | 2. Elective work leave   | 4. Benefits, transfers and other social protection measures   |
| 5. Type of policy on testing (universal, reduced to certain groups, etc.)                                     | 3. Reduction of working hours  | 5. Women's participation in the digital era   |
| 6. Free test coverage expansion   | 4. Prohibition of dismissal from work  | 6. Other  |
| 7. Hospitals (mechanical ventilators, additional ICU beds, protection equipment, temporary hospitals, others) | 5. Other   |   |

Source: Survey Team

## 18.2 Macroeconomic analysis and selection of priority countries

### 18.2.1 Macroeconomic analysis

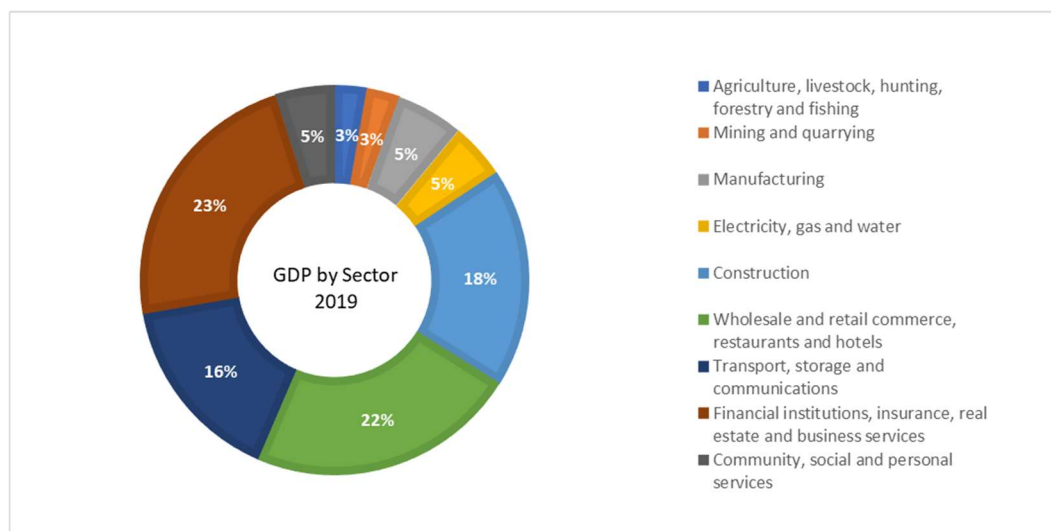
#### (1) Industrial composition

**Table 18-5 Industrial Composition (Panama)**

Table: Gross domestic product, by sector (Millones de balboas a precios constantes de 2007)

|  | 2011   | 2012   | 2013   | 2014   | 2015   | 2016   | 2017   | 2018   | 2019a/ | 2020 b/ |
|--|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------|
| Agriculture, livestock, hunting, forestry and fishing                | 861    | 864    | 906    | 928    | 928    | 929    | 939    | 959    | 1,025  | 1,067   |
| Mining and quarrying   | 334    | 418    | 513    | 559    | 615    | 665    | 719    | 741    | 1,044  | 1,400   |
| Manufacturing  | 1,713  | 1,852  | 1,924  | 1,992  | 2,061  | 2,084  | 2,139  | 2,171  | 2,138  | 1,667   |
| Electricity, gas and water   | 948    | 1,088  | 1,143  | 1,274  | 1,406  | 1,549  | 1,663  | 1,705  | 1,776  | 1,672   |
| Construction   | 2,690  | 3,515  | 4,446  | 5,061  | 5,761  | 6,225  | 6,742  | 6,956  | 6,972  | 3,357   |
| Wholesale and retail commerce, restaurants and hotels                | 6,429  | 7,144  | 7,329  | 7,409  | 7,652  | 7,938  | 8,206  | 8,399  | 8,613  | 6,602   |
| Transport, storage and communications                                | 4,205  | 4,419  | 4,522  | 4,609  | 4,733  | 4,820  | 5,368  | 5,724  | 6,030  | 5,653   |
| Financial institutions, insurance, real estate and business services | 6,113  | 6,453  | 6,888  | 7,267  | 7,651  | 8,011  | 8,269  | 8,495  | 8,722  | 7,806   |
| Community, social and personal services                              | 3,392  | 3,527  | 3,581  | 3,741  | 3,937  | 4,285  | 4,578  | 4,955  | 1,877  | 1,511   |
| Total  | 26,685 | 29,279 | 31,253 | 32,841 | 34,744 | 36,507 | 38,624 | 40,105 | 38,195 | 30,735  |

Source: ECLAC



Source: Survey Team



## (2) Trends in major economic indicators

**Table 18-6 Trends in Major Economic Indicator (Panama)**

Table 1 PANAMA: MAIN ECONOMIC INDICATORS (Annual growth rates)

|  | 2011     | 2012     | 2013     | 2014      | 2015     | 2016     | 2017     | 2018      | 2019a/    | 2020 b/  |
|--|----------|----------|----------|-----------|----------|----------|----------|-----------|-----------|----------|
| Gross domestic product (Annual growth rates c/)                                      | 11.3     | 9.8      | 6.9      | 5.1       | 5.7      | 5.0      | 5.6      | 3.7       | 3.0       | -17.9    |
| Per capita gross domestic product (Annual growth rates c/)                           | 9.4      | 7.9      | 5.1      | 3.3       | 3.9      | 3.2      | 3.8      | 2.2       | 1.6       | -19.1    |
| Gross domestic product, by sector (Annual growth rates c/)                           |          |          |          |           |          |          |          |           |           |          |
| Agriculture, livestock, hunting, forestry and fishing                                | -0.0     | 0.4      | 4.9      | 2.4       | -0.0     | 0.1      | 1.1      | 2.1       | 4.9       | 4.1      |
| Mining and quarrying   | 22.1     | 25.2     | 22.8     | 8.9       | 10.0     | 8.1      | 8.1      | 3.1       | 41.3      | 34.1     |
| Manufacturing  | 5.6      | 8.2      | 3.9      | 3.5       | 3.4      | 1.1      | 2.6      | 1.5       | -1.1      | -22.0    |
| Electricity, gas and water   | 21.3     | 14.7     | 5.1      | 11.5      | 10.3     | 10.2     | 7.3      | 2.5       | 4.6       | -5.8     |
| Construction   | 24.1     | 30.6     | 26.5     | 13.9      | 13.8     | 8.0      | 8.3      | 3.2       | 0.1       | -51.9    |
| Wholesale and retail commerce, restaurants and hotels                                | 17.9     | 11.1     | 2.6      | 1.1       | 3.3      | 3.7      | 3.4      | 2.3       | 1.8       | -23.3    |
| Transport, storage and communications  | 10.1     | 5.1      | 2.3      | 1.9       | 2.7      | 1.8      | 11.4     | 6.6       | 6.3       | -6.2     |
| Financial institutions, insurance, real estate and business services                 | 6.8      | 5.6      | 6.7      | 5.5       | 5.3      | 4.7      | 3.2      | 2.7       | 2.3       | -10.5    |
| Community, social and personal services  | 4.8      | 4.0      | 1.5      | 4.5       | 5.2      | ...      | ...      | ...       | 3.1       | -19.5    |
| Balance of Payments (Millions of dollars)  |          |          |          |           |          |          |          |           |           |          |
| Current account balance  | -4,993.3 | -3,527.5 | -4,400.9 | -6,730.1  | -4,273.9 | -4,634.0 | -3,692.1 | -5,355.1  |           |          |
| Goods balance  | -7,217.2 | -6,414.9 | -9,539.8 | -10,823.0 | -9,721.1 | -9,012.4 | -9,821.5 | -10,613.2 | -9,047.3  | -3,183.2 |
| Exports, f.o.b.  | 16,926.2 | 18,857.3 | 17,056.9 | 14,971.5  | 12,765.4 | 11,687.0 | 12,469.6 | 13,355.6  | 10,717.6  | 6,720.8  |
| Imports, f.o.b.  | 24,143.4 | 25,272.2 | 26,596.7 | 25,794.5  | 22,486.5 | 20,699.4 | 22,291.2 | 23,968.8  | -19,302.3 | -9,842.6 |
| Services trade balance   | 3,932.9  | 4,696.1  | 7,783.1  | 7,788.5   | 9,578.4  | 8,056.9  | 9,296.8  | 9,540.9   | 9,550.7   | 4,755.2  |
| Income balance   | -1,911.4 | -1,896.7 | -2,706.7 | -3,817.8  | -4,025.2 | -3,559.3 | -3,043.0 | -4,212.5  | -3,804.4  | -1,335.6 |
| Net current transfers  | 202.4    | 88.0     | 62.5     | 122.2     | -106.0   | -119.2   | -124.4   | -70.2     | -31.3     | 100.6    |
| Capital and financial balance (Millions of dollars)                                  |          |          |          |           |          |          |          |           |           |          |
| Net foreign direct investment d/   | 2,956.2  | 3,254.0  | 3,612.3  | 4,129.6   | 3,966.3  | 4,652.2  | 4,314.5  | 5,134.1   | 4,320.4   | 1,915.6  |
| Other capital movements d/   | 1,808.9  | -684.5   | 679.3    | 2,997.4   | -676.8   | 1,309.1  | -1,915.0 | -234.2    | 1,257.9   |          |
| Foreign remittance from abroad for 2019 and 2020                                     |          | 381.1    | 407.9    | 651.9     | 472.7    | 426.1    | 443.7    | 456.8     | 493.1     |          |
| Remittances from emigrant workers  |          |          |          |           |          |          |          |           | -327.5    | -79.9    |
| Microfinance dispatched and the sectors that received microfinance for 2019 and 2020 |          |          |          |           |          |          |          |           |           |          |

Source: Economic Survey of Latin America and the Caribbean 2020: Main conditioning factors of fiscal and monetary policies in the post-COVID-19 era

### 18.2.2 Impact analysis and identification of key sectors

#### (1) Impact assessment results for each sector by AHP analytic hierarchy process based on economic indicators

**Table 18-7 Results of Sector Impact Analysis by COVID-19 (Panama)**

| ECLAC category   | Changes around COVID-19 | Trends before COVID-19 | Total GDP ratio of the sector | comprehensive evaluation |   |
|--|-------------------------|------------------------|-------------------------------|--------------------------|---|
| Importance (weight)  | 0.4590                  | 0.0660                 | 0.0750                        |                          |   |
| Agriculture, livestock, hunting, forestry and fishing                | 1                       | 1                      | 1                             | 0.013                    | 9 |
| Mining and quarrying   | 2                       | 9                      | 2                             | 0.037                    | 8 |
| Manufacturing  | 6                       | 2                      | 5                             | 0.072                    | 4 |
| Electricity, gas and water   | 3                       | 7                      | 3                             | 0.046                    | 7 |
| Construction   | 9                       | 8                      | 7                             | 0.115                    | 1 |
| Wholesale and retail commerce, restaurants and hotels                | 8                       | 5                      | 8                             | 0.102                    | 2 |
| Transport, storage and communications                                | 4                       | 6                      | 6                             | 0.060                    | 6 |
| Financial institutions, insurance, real estate and business services | 5                       | 4                      | 9                             | 0.072                    | 5 |
| Community, social and personal services                              | 7                       | 3                      | 4                             | 0.082                    | 3 |

Source: Survey Team

#### 1) ECLAC Sector Classification Amendments to the Sector Classification

In line with the method described in the main volume, the Sector Classification is divided into the Vertical Sector and the Cross-Cutting Sector, the ECLAC classification sector is allocated to the Vertical Sector Classification, and the evaluation of various policies related to COVID-19 taken by the



government along with the results of the partner survey and the indicators of the national development cooperation policy, the ranking of priority sectors are calculated using the four indicators, which are described in the table below.

**Table 18-8 Ranking of Priority Sectors (Panama)**

|                                   | Economic Indicator Analysis | Government Policy on COVID-19 | Survey on COVID-19 by Development Partners | Country Development Cooperation Policy | Base Case |   | Priority |
|-----------------------------------|-----------------------------|-------------------------------|--|--|-----------|---|----------|
| Importance (weight)               | 0.6000                      | 0.2000                        | 0.1000                                     | 0.1000                                 |           |   |          |
| Social and Economic Policy        | 0.0000                      | 0.0842                        | 0.0000                                     | 0.0000                                 | 0.0842    |   | ○        |
| Health and Nutrition              | 0.0415                      | 0.0351                        | 0.0000                                     | 0.0000                                 | 0.0766    | 5 |          |
| Education                         | 0.0355                      | 0.0070                        | 0.0000                                     | 0.0200                                 | 0.0625    | 6 |          |
| Agriculture and Rural Development | 0.0571                      | 0.0000                        | 0.0200                                     | 0.0200                                 | 0.0971    | 3 | ○        |
| Manufacturing                     | 0.1729                      | 0.0421                        | 0.0100                                     | 0.0000                                 | 0.2250    | 2 | ○        |
| Environment/ Disaster Management  | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0400                                 | 0.0400    |   | ○        |
| Governance and Security           | 0.0000                      | 0.0105                        | 0.0000                                     | 0.0000                                 | 0.0105    |   | ○        |
| DX Innovation                     | 0.0000                      | 0.0035                        | 0.0300                                     | 0.0000                                 | 0.0335    |   | ○        |
| Infrastructure and Every          | 0.2215                      | 0.0000                        | 0.0200                                     | 0.0200                                 | 0.2615    | 1 | ○        |
| Tourism                           | 0.0715                      | 0.0000                        | 0.0200                                     | 0.0000                                 | 0.0915    | 4 |          |
| Public-Private Partnership        | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0000                                 | 0.0000    |   | ○        |

Source: Survey Team

## (2) Sensitivity analysis

### 1) Analysis case settings

Based on the above methodology, the following case settings were made.

**Table 18-9 Sensitivity Analysis Case-based Weighting Settings (Panama)**

|  | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|--|-----------|------------------------|------------------------|------------------------|
| Economic indicator analysis  | 0.6       | 0.6                    | 0.5                    | 0.5                    |
| Investigation and arrangement of various policies for COVID-19 taken by the government | 0.2       | 0.1                    | 0.1                    | 0.1                    |
| Development partner survey results   | 0.1       | 0.2                    | 0.2                    | 0.3                    |
| Country-specific development cooperation policy  | 0.1       | 0.1                    | 0.2                    | 0.1                    |

Source: Survey Team

### 2) Summary of sensitivity analysis

The results of each sensitivity analysis are as summarized below. Sensitivity analysis did not show much change, which was close to the result of the base case.

**Table 18-10 Summary of Sensitivity Analysis Results (Panama)**

|                                   | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|-----------------------------------|-----------|------------------------|------------------------|------------------------|
| Social and economic policy        |           |                        |                        |                        |
| Health care / nutrition           | 5         | 5                      | 6                      | 5                      |
| education                         | 6         | 6                      | 5                      | 6                      |
| Agriculture / rural development   | 3         | 3                      | 3                      | 3                      |
| Manufacturing industry            | 2         | 2                      | 2                      | 2                      |
| Environment / disaster prevention |           |                        |                        |                        |
| Governance and citizen security   |           |                        |                        |                        |
| DX / Innovation                   |           |                        |                        |                        |
| Infrastructure and Energy         | 1         | 1                      | 1                      | 1                      |
| sightseeing                       | 4         | 4                      | 4                      | 4                      |
| Public-private partnership        |           |                        |                        |                        |

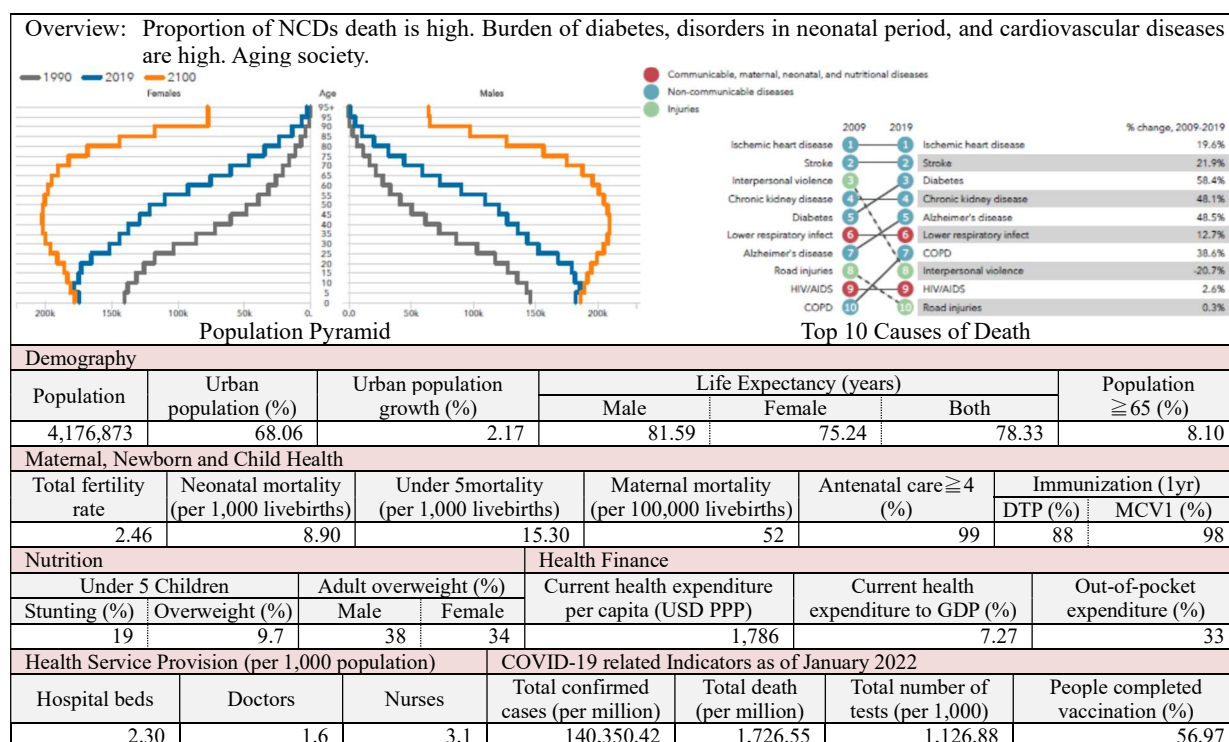
Source: Survey Team

### **(3) Selection of priority sectors by country**

From the above results, 1) social / economic policy, 2) agriculture / rural development, 3) manufacturing industry, 4) environment / disaster prevention, 5) governance / citizen security, 6) DX / innovation, 7) infrastructure / energy, 8) public-private partnership are selected as priority sectors.

## 18.3 Country-specific information by sector

### 18.3.1 Health care / nutrition



Source: Graphs=Institute for Health Metrics and Evaluation, County Profile; Demography, Total fertility rate, Neonatal mortality, under-5 mortality, Health finance= World Development Indicators, the World Bank (Accessed on Aug 2021); Maternal mortality= UNICEF (Sep 2019); Antenatal care, Immunization, Nutrition, Health service provision,= OECD/The World Bank (2020), Health at a Glance: Latin America and the Caribbean 2020; COVID-19 related indicators= Our World in Data (Accessed on Jan 2022)

| Health                                  |  |
|---|--|
| Leadership/ Governance                  | Responsible Agency: Ministerio de Salud (MINSa), Caja de Seguro Social (CSS)<br><a href="http://www.minsa.gob.pa/">http://www.minsa.gob.pa/</a><br>Centralized<br>Major Relevant Policies: Policia Nacional de Salud 2016-2025   |
| Service Providing System                | Ministry of Health and Social Security Fund provides public sector health services. Integrated PHC services are provided by Modelo de atención individual, familiar, comunitario y Ambiental (Individual, family, community, and environmental care model) at primary level. Private sector targets high-income group. |
| Health Finance                          | National Health Insurance  |
| Human Resource for Health               | (No information)   |
| IT/ Digital Health                      | National eHealth Strategy. National referral hospital provides virtual hospital service. PAHO Public Health Campus program supports virtual clinic services to support diagnosis and education for doctors in remote areas.  |
| Drugs/ Medical Equipment                | Ministry of Health and Social Security Fund procure and distribute for their own facilities.   |
| Priority                                | Elimination of inequity in service access between urban and rural, as well as the poor and the rich. Noncommunicable diseases  |
| Communicable Disease Emergency Response | Necessary action and responses are undertaken along with IHR.<br>Instituto Conmemorativo Gorgas de Estudios de la Salud (ICGES) established in 1928 is the main player of national laboratory network. Since 2021, JICA support capacity of diagnosis, surveillance and warning of infectious diseases.                |
| Major Development Partners              | PAHO/WHO, One UN   |
| Nutrition                               |  |
| Institutional Arrangement               | Presidencia de la República, Secretaría Nacional para el Plan Alimentario Nutricional  |
| Major Relevant Policies                 | Plan Nacional de Seguridad Alimentaria y Nutrición 2009 – 2015<br>Plan Nacional de Seguridad Alimentaria y Nutricional Panama, 2009-2015   |
| Human Resource for Health               | (No information)   |

Source: Survey Team with reference to Institute for Health Metrics and Evaluation, County Profile, WHO, Health in Americas 2017, WHO, Global atlas of medical devices, 2017, ICGES website (<http://www.gorgas.gob.pa/sobre-icges/que-es-el-icges/>), WHO Country Cooperation Strategy for Panama 2014-2018, May 2014, and WHO, Nutrition Landscape Information System (NLIS)

## 18.3.2 Education

| Overview  |   |  |                        |                              |                 |               |         |
|---|---|--|------------------------|------------------------------|-----------------|---------------|---------|
| Number of children  | Education level   | Preschool  | primary                | Lower secondary              | Upper secondary |               |         |
|   | 2017  | 95,481 people  | 418,852 people         | 200,934 people               | 121,979 people  |               |         |
| Source: Institute for Statistics (UIS), UNESCO Bureau of Statistics |   |  |                        |                              |                 |               |         |
| Government authority  | Ministry of Education (Ministerio de Educación)   |  |                        |                              |                 |               |         |
| Education indicator   | Net enrollment rate: primary education 86.8%, lower secondary 87.8%, upper secondary 56.4% (2017)<br>Primary education completion rate 89.8% (2017), out-of-school children rate 13.2% (2017), public education budget GDP ratio 3.13% (2019) Source: UIS   |  |                        |                              |                 |               |         |
| Learning achievement survey   | PISA (2018) 64% in reading comprehension, 81% in mathematics, 71% in science of 7 <sup>th</sup> grade students (equivalent to 1 <sup>st</sup> grade of lower secondary school) have not reached level 2 that "understands the basic contents".<br>3rd Regional Education Quality Survey (TERCE, 2013) 3rd grade science 664.09 points (12th out of 15 countries below average), reading comprehension 670.25 points (12th out of 15 countries below average), 6th grade science 643.88 points (12th out of 15 countries below average), reading comprehension 671.37 points (11th out of 15 countries below average), science 674.67 points (11th out of 15 countries below average). |  |                        |                              |                 |               |         |
| Impact of COVID-19  |   |  |                        |                              |                 |               |         |
| School closure / reopening  | Completely closed from March 11, 2020 to February 2, 2021 with 211 days, the longest among the 23 in Central America and Caribbean countries. In 2021, vacations was extended from March to April, and hybrid classes were held from May.   |  |                        |                              |                 |               |         |
| COVID-19 measures   | -COVID-19 Response Education Strategy Action Plan (Educational Stars Never Stop Strategy)<br>-Operational rules regarding distance education support  |  |                        |                              |                 |               |         |
| Distance education  | Implementation status   | March 2020 Distribution of education modules started through an online portal called Eduka Panama. From July 20, the Ministry of Education's original education platform Ester was launched for third-year secondary school students, and laptop computers were distributed to lower and upper secondary school students. Delivering "Connect with the Star" educational videos from state-owned television and radio stations. These programs are in line with the national curriculum.<br>By December 2020, the national coverage rate for distance education was about 85%, and as of July 2021, it cover up to 89% (Ministry of Education). The educational platform ESTER is used in lower and upper secondary schools, and is highly effective for printed teaching materials for primary school students. |                        |                              |                 |               |         |
|   | Access  | School-aged children / students who can connect to the Internet at home (%) (2013)<br>Internet connection is low, especially in areas where many indigenous and the  |                        |                              |                 |               |         |
|   |   |  | Rural area             | Urban area                   | Poor Class      | wealthy class | Overall |
|   |   | Whole school age   | 10                     | 44                           | 4               | 94            | 31      |
|   | Primary Education   | 8  | 40                     | 2                            | 95              | 27            |         |
|   | Lower secondary education   | 11   | 48                     | 4                            | 92              | 33            |         |
|   | Upper secondary education   | 15   | 51                     | 8                            | 97              | 38            |         |
|   | poor people live.<br>Source: UNICEF Global database on school-age digital connectivity  |  |                        |                              |                 |               |         |
|   | Teacher training  | The Teacher Development Bureau of the Ministry of Education plays a central role in concluding agreements with private companies such as TITAN to provide teacher training for ICT, platforms, digital teaching materials, etc.  |                        |                              |                 |               |         |
| School hygiene  | Infection control measures  | -COVID-19 Biosecurity Measures Guidelines for Infection Risk Reduction -<br>Biosecurity guide for educational institutions   |                        |                              |                 |               |         |
|   | Facility maintenance  |  | 2019                   | Basic water supply equipment |                 |               |         |
|   |   | Whole country  | Undeveloped 20%        |                              |                 |               |         |
|   |   | Urban area   | Undeveloped 1% or less |                              |                 |               |         |
|   |   | Rural area   | Undeveloped 30%        |                              |                 |               |         |
|   |   | Primary Education  | Undeveloped 20%        |                              |                 |               |         |
|   | Source: World Bank / UNICEF Survey <a href="https://washdata.org/">https://washdata.org/</a>  |  |                        |                              |                 |               |         |
| School lunch / nutrition  | On March 3, 2020, the Ministry of Education began offering nutritious and healthy lunches to children and students eligible for the "Study without Hunger" program. Conducted for indigenous communities and vulnerable urban schools with the support of the Food and Agriculture Organization of the United Nations (FAO). Other children are also receiving similar services through the "Panama Unity" program.   |  |                        |                              |                 |               |         |

|                                       |  |
|---------------------------------------|--|
| Countermeasures for vulnerable people | -Inclusive education TV program (sign language interpreter installed)<br>-Distribution of teaching materials in indigenous languages   |
| Support for donors, etc.              | UNICEF: Evaluation of "Bilingual Cross-Cultural Education Five-Year Plan 2014-2019"<br>OEI: Virtual teacher training.<br>IDB & UNICEF: "Tu CAIPI en Casa" (your CAIPI at home) project. Information distribution such as videos, stories, songs, care recommendations, and various activities for home study by the educational technology platform. |

Source: Survey Team

### 18.3.3 Agriculture / rural development

|   |  |            |            |            |            |           |
|---|--|------------|------------|------------|------------|-----------|
| Urban / rural population ratio                    | 67.7% / 32.3% (FAOSTAT 2018)   |            |            |            |            |           |
| Agricultural land area                            | 2,259,000 ha (FAOSTAT 2019) 1)   |            |            |            |            |           |
| Agricultural sector employment                    | 14.4% of all employment (male / female ratio: 75.6% / 24.4%) (FAOSTAT 2019) 2)   |            |            |            |            |           |
| Agricultural GDP                                  | 2.7% of total GDP (World Bank 2020)  |            |            |            |            |           |
| Of the agricultural sector Value added amount     | \$ 1,719,269.41 1,000 dollars (World Bank 2020) 3) * Statistics include forestry   |            |            |            |            |           |
| Agricultural sector expenditure ratio             | Ratio of agricultural fiscal expenditure to national budget (%) 4)   |            |            |            |            |           |
|   | 2018   | 2019       | 2020       |            |            |           |
|   | 1.66   | 1.73       | 2.26       |            |            |           |
| Agricultural sector import / export balance       | Trade Balance (USD1,000 FAOSTAT) 5)  |            |            |            |            |           |
|   |  | 2015       | 2016       | 2017       | 2018       | 2019      |
|   | export   | 331,442    | 315,104    | 323,355    | 342,289    | 571,832   |
|   | Import   | 1,759,998  | 1,821,774  | 1,890,745  | 2,051,724  | 2,649,638 |
| Balance of payments                               | -1,428,556   | -1,506,670 | -1,567,390 | -1,709,435 | -2,077,806 |           |
| Agricultural development Policy / plan / strategy | <p>With the opening of the market since the 2000s, the government has signed trade agreements and treaties between various regions and bilaterals, and the agricultural sector is in a more competitive environment and its contribution to the domestic economy is decreasing year by year. is doing. The government will support agricultural producers' agricultural production, access to domestic and international markets, and through public policies to promote profitable and sustainable agriculture, without increasing imports. Attempting to restore trust. The National Agricultural Agreement (2014) 6) is an agricultural agreement prepared by the Ministry of Agrarian Development (MIDA) as a policy for that purpose, and the implementation of the programs and projects defined in it focuses on the following five strategic goals. I'm guessing. 1) Agricultural education, 2) Support for producers, 3) Optimization of productivity and competitiveness, 4) Rural and social development management, 5) Strengthening and modernization of institutions.</p> <p>Most of the support provided to the agricultural sector (73%) is granted in the form of market price protection mechanisms, and producers are less regulated to sell agricultural products at higher prices (Satoukibi). Producers were priced lower than international prices by the producer pricing mechanism.) (2019, IDB) 7). Livestock products are also the most beneficiary of the basic food products due to this deregulation, and are traded at higher prices than crops 7).</p> <p>As direct support from public funding, 13% of agricultural assistance provided between 2010 and 2015 includes financing assistance for women and young people in the agricultural sector and rural areas for purchasing inputs. The "Crop Development in Rural and Indigenous Communities" program8), implemented in the form of direct financial support to indigenous communities, has benefited 864 farm households and 1064 hectares of cocoa and coffee cultivation. ..</p> <p>The long-term strategy of the agricultural sector is specified as one of the five strategic axes in the National Strategic Plan 20309). In particular, it aims to eliminate hunger, achieve food security and nutritional improvements, and promote sustainable agriculture. As a concrete plan for that, the National Food Security Plan (2017-2021) 10) is the latest agricultural plan, and we are working on improving the following issues in the agricultural production field.</p> <p>Scattered structure of producers (structure inefficient to achieve production target), unstable land ownership (estimated that 26% of the country's agricultural land has no ownership), high cost of production unit price (due to high labor cost) Low productivity), aging producers and reduced agricultural management capacity, climate-dependent industry (production system depends on rainy season cycle), post-harvest loss (transportation and marketing process is small and medium-sized production) It is an important bottleneck for people and 30% of the production is disposed of after harvesting), soaring input materials for low-priced agricultural products, low capacity of agricultural</p> |            |            |            |            |           |

|                    |   |
|--------------------|---|
|                    | extension system and fragile existing system (90%) Farmers cannot receive technical support from extension workers)   |
| Impact of COVID-19 | <p>Of the 246,000 producers associated with the agricultural sector, 80% belong to family farming, and unlike commercial farming, this activity is primarily self-sufficient<sup>11</sup>).</p> <p>According to a survey (2020) conducted by the Americas Agricultural Cooperation Organization (IICA) <sup>12</sup>, the three problems faced by farmers in the form of family farming in a pandemic disaster are 1) lack of hygiene measures and biosecurity protocols, 2 ) It identifies transportation and delivery challenges due to mobility restrictions and reduced operator staff, and 3) restricted access to credits for family-based production and reconstruction.</p> <p>When defining a pandemic strategy, the government prioritizes maintaining the national production and supply system, including agribusiness, as one of the socio-economic pillars that guarantees social relief, not just the agricultural production sector. There is. In addition, the Panama Solidarity Plan (PPS) <sup>13</sup> has been activated as a measure to ensure food security. This started with establishing a production system for 300,000 baskets a week for food (basket) distribution. In addition, local agricultural authorities have announced a series of efforts to promote the agricultural sector and family business, including the Panama Agro Solidarity Program<sup>14</sup>), which consists of a \$ 150 million financial package raised by the Panama State Bank (BNP), is doing.</p>  |
| Source / reference | <p>1) FAOSTAT-Land, Input and Sustainability-Land Use-Area-Agriculture (<a href="https://www.fao.org/faostat/en/#data/RL">https://www.fao.org/faostat/en/#data/RL</a>)</p> <p>2) FAOSTAT- Share of employment in agriculture (% of total employment) &amp; Share of female employment in agriculture (% of employment in agriculture) (<a href="https://www.fao.org/faostat/en/#data/OE">https://www.fao.org/faostat/en/#data/OE</a>)</p> <p>3) <a href="https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=MX&amp;view=chart">https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=MX&amp;view=chart</a></p> <p>4) FAOSTAT-Government Expenditure-Share of Total Expenditure-Central Government (<a href="https://www.fao.org/faostat/en/#data/IG">https://www.fao.org/faostat/en/#data/IG</a>)</p> <p>5) FAOSTAT-Trade-Crops and livestock products-Import / Export Value-Agricultural Products (<a href="https://www.fao.org/faostat/en/#data/TCL">https://www.fao.org/faostat/en/#data/TCL</a>)</p> <p>6) Pacto Nacional de Agro (<a href="https://asamblea-dspace.metabiblioteca.com/bitstream/001/87/1/memoria_2016_pdf.%20MIDA.pdf">https://asamblea-dspace.metabiblioteca.com/bitstream/001/87/1/memoria_2016_pdf.%20MIDA.pdf</a>)</p> <p>7) Análisis de Políticas Agropecuarias en Panamá, 2019, IDB (<a href="https://publications.iadb.org/publications/spanish/document/An%C3%A1lisis_de_pol%C3%ADticas_agropecuarias_en_Panam%C3%A1_es.pdf">https://publications.iadb.org/publications/spanish/document/An%C3%A1lisis_de_pol%C3%ADticas_agropecuarias_en_Panam%C3%A1_es.pdf</a>)</p> <p>8) LOGROS DEL PERIODO 2016-2017, MIDA (<a href="https://mida.gob.pa/wp-content/uploads/2021/07/logros-16-17.pdf">https://mida.gob.pa/wp-content/uploads/2021/07/logros-16-17.pdf</a>)</p> <p>9) Plan Estratégico Nacional 2030 (<a href="http://extwprlegs1.fao.org/docs/pdf/pan189492.pdf">http://extwprlegs1.fao.org/docs/pdf/pan189492.pdf</a>)</p> <p>10) PLAN NACIONAL DE SEGURIDAD ALIMENTARIA Y NUTRICIONAL DE PANAMÁ 2017-2021 (<a href="http://extwprlegs1.fao.org/docs/pdf/pan182791.pdf">http://extwprlegs1.fao.org/docs/pdf/pan182791.pdf</a>)</p> <p>11) COVID-19 contagia a la agricultura familiar, 2020, La Prensa (<a href="https://www.prensa.com/impresa/economia/COVID-19-contagia-a-la-agricultura-familiar/">https://www.prensa.com/impresa/economia/COVID-19-contagia-a-la-agricultura-familiar/</a>)</p> <p>12) IICA SURVEY: COVID-19 IS AFFECTING FAMILY FARMERS AND WILL IMPACT THE FOOD SUPPLY (<a href="https://www.iica.int/en/press/news/iica-survey-COVID-19-affecting-family-farmers-and-will-impact-food-supply">https://www.iica.int/en/press/news/iica-survey-COVID-19-affecting-family-farmers-and-will-impact-food-supply</a>)</p> <p>13) Plan Panamá Solidario (<a href="https://dds.cepal.org/observatorio/socialCOVID-19/fichamedida.php?id=PAN001">https://dds.cepal.org/observatorio/socialCOVID-19/fichamedida.php?id=PAN001</a>)</p> <p>14) Plan Panamá Agro Solidario (<a href="https://dds.cepal.org/observatorio/socialCOVID-19/fichamedida.php?id=PAN013">https://dds.cepal.org/observatorio/socialCOVID-19/fichamedida.php?id=PAN013</a>)</p> |

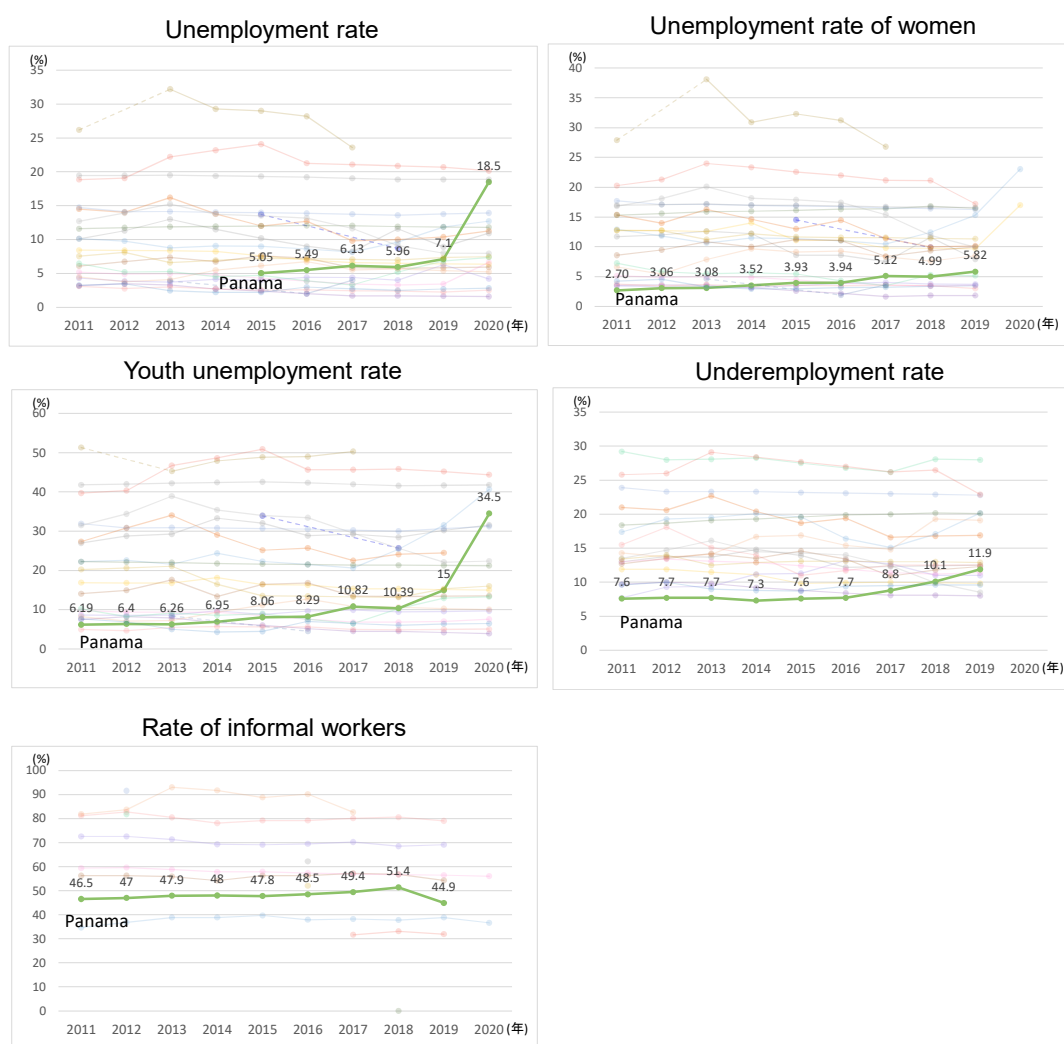
### 18.3.4 Private sector

Panama ranks high in both GDP and per capita GDP. GDP per worker is the second highest in the region. Compared with Costa Rica, which is a country with similar GDP per capita, the minimum wage of Panama is lower. The unemployment rate is moderate, but the informal worker rate is low. It is a concern that the unemployment rate is getting worse year by year.

|              | Index                      | Value  | Ranking                 | Year | Source     |
|--------------|----------------------------|--------|-------------------------|------|------------|
| Productivity | GDP per capita (USD)       | 12,269 | 6 (Among 22 countries)  | 2020 | World Bank |
|              | GDP per worker (USD)       | 66,977 | 2 (Among 18 countries)  | 2019 | World Bank |
| Employment   | Minimum wage (USD / month) | 352    | 8 (Among 23 countries)  | 2019 | ILO        |
|              | Unemployment rate          | 7.1    | 11 (Among 22 countries) | 2019 | Statista   |
|              | Female unemployment rate   | 5.82   | 8 (Among 22 countries)  | 2019 | World Bank |
|              | Youth unemployment rate    | 15     | 10 (Among 22 countries) | 2019 | Statista   |
|              | Underemployment rate       | 11.9   | 7 (Among 18 countries)  | 2019 | ILO        |
|              | Informal worker rate       | 44.9   | 3 (Among 12 countries)  | 2019 | CEPAL      |

Source: Described in the table

Changes in unemployment rate, etc.



Source: World Bank, ILO, The Global Economy, etc.

### 18.3.5 Environment / disaster prevention

|                     | item   | data   | remarks                          |
|---------------------|--|--|----------------------------------|
| environment         | Environmental agency                                     | Mi Ambiente  |                                  |
|                     | Waste-related organizations                              | Autoridad de Aseo Urbano y Domiciliario (AAUD)<br>Municipalities                           |                                  |
|                     | Environmental Budget (USD)                               | 2019: 61,913,805<br>2020: 43,426,360<br>2021: 42,900,000<br>Three-year average: 49,413,388 | Average: 4th out of 23 countries |
|                     | Environmental budget per capita (2019-2021 average, USD) | 11.5   | 8th out of 23 countries          |
|                     | Budget ratio to national budget (2019)                   | 0.26%  | 10th out of 23 countries         |
|                     | Donor support status                                     | 12 cases   | As of May 2021                   |
|                     | Renewable energy power generation (GWh) (2019)           | 168  | IRENA, 2021                      |
|                     | Geothermal power generation capacity (MWe)               | 2020: 0<br>2025 Forecast: 0  | WGC, 2020                        |
| Disaster prevention | Disaster prevention organization                         | The National Civil Protection System (SINAPROC)  |                                  |
|                     | Donor support status                                     | 1  | As of May 2021                   |
|                     | Number of natural disasters (2010-2020)                  | 14 cases<br>Major disasters: floods, droughts  |                                  |



|  |  |              |                          |
|--|--|--------------|--------------------------|
|  | Number of victims (persons) per 100,000 population | 1,162 people | 14th out of 23 countries |
|--|--|--------------|--------------------------|

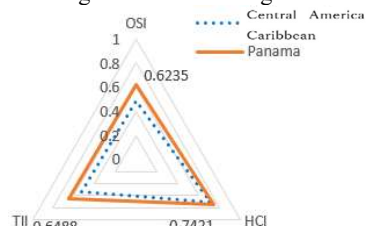
Source: Survey Team

### 18.3.6 Governance and citizen security

| Item                                    | Overview   |           |                           |                           |        |                          |      |    |    |      |    |    |      |    |    |   |      |    |    |      |    |    |      |    |    |                          |      |    |    |      |    |    |      |    |    |                    |      |    |    |      |    |    |      |    |    |             |      |    |    |      |    |    |      |    |    |                       |      |    |    |      |    |    |      |    |    |
|---|--|-----------|---------------------------|---------------------------|--------|--------------------------|------|----|----|------|----|----|------|----|----|---|------|----|----|------|----|----|------|----|----|--------------------------|------|----|----|------|----|----|------|----|----|--------------------|------|----|----|------|----|----|------|----|----|-------------|------|----|----|------|----|----|------|----|----|-----------------------|------|----|----|------|----|----|------|----|----|
| Political system                        | Presidential Republic  |           |                           |                           |        |                          |      |    |    |      |    |    |      |    |    |   |      |    |    |      |    |    |      |    |    |                          |      |    |    |      |    |    |      |    |    |                    |      |    |    |      |    |    |      |    |    |             |      |    |    |      |    |    |      |    |    |                       |      |    |    |      |    |    |      |    |    |
| Election system                         | The president and vice president are elected by a simple majority general direct election. The term of office is 5 years. (President can be re-elected, term is only one term)   |           |                           |                           |        |                          |      |    |    |      |    |    |      |    |    |   |      |    |    |      |    |    |      |    |    |                          |      |    |    |      |    |    |      |    |    |                    |      |    |    |      |    |    |      |    |    |             |      |    |    |      |    |    |      |    |    |                       |      |    |    |      |    |    |      |    |    |
| Legislative system                      | Unicameral National Assembly   |           |                           |                           |        |                          |      |    |    |      |    |    |      |    |    |   |      |    |    |      |    |    |      |    |    |                          |      |    |    |      |    |    |      |    |    |                    |      |    |    |      |    |    |      |    |    |             |      |    |    |      |    |    |      |    |    |                       |      |    |    |      |    |    |      |    |    |
| Most recent / next legislative election | May 5, 2019 (Next time is scheduled for May 2024)  |           |                           |                           |        |                          |      |    |    |      |    |    |      |    |    |   |      |    |    |      |    |    |      |    |    |                          |      |    |    |      |    |    |      |    |    |                    |      |    |    |      |    |    |      |    |    |             |      |    |    |      |    |    |      |    |    |                       |      |    |    |      |    |    |      |    |    |
| Appointment of judicial system / judge  | The judge is appointed by the president.   |           |                           |                           |        |                          |      |    |    |      |    |    |      |    |    |   |      |    |    |      |    |    |      |    |    |                          |      |    |    |      |    |    |      |    |    |                    |      |    |    |      |    |    |      |    |    |             |      |    |    |      |    |    |      |    |    |                       |      |    |    |      |    |    |      |    |    |
| Political stability                     | Since 2012, the level of stability has improved.   |           |                           |                           |        |                          |      |    |    |      |    |    |      |    |    |   |      |    |    |      |    |    |      |    |    |                          |      |    |    |      |    |    |      |    |    |                    |      |    |    |      |    |    |      |    |    |             |      |    |    |      |    |    |      |    |    |                       |      |    |    |      |    |    |      |    |    |
| “Worldwide Governance Indicators”       | <p>Governance indicators are on the regional average, with the exception of “control of corruption”. Corruption and impunity of crime are serious enough to affect the judicial system and senior government officials.</p> <table border="1"> <caption>Worldwide Governance Indicators (WGI) Data (Approximate Percentile Ranks)</caption> <thead> <tr> <th>Indicator</th> <th>Year</th> <th>Latin America &amp; Caribbean</th> <th>Panama</th> </tr> </thead> <tbody> <tr> <td rowspan="3">Voice and Accountability</td> <td>2010</td> <td>60</td> <td>65</td> </tr> <tr> <td>2019</td> <td>60</td> <td>65</td> </tr> <tr> <td>2020</td> <td>60</td> <td>65</td> </tr> <tr> <td rowspan="3">Political Stability and Absence of Violence/Terrorism</td> <td>2010</td> <td>55</td> <td>55</td> </tr> <tr> <td>2019</td> <td>55</td> <td>55</td> </tr> <tr> <td>2020</td> <td>55</td> <td>55</td> </tr> <tr> <td rowspan="3">Government Effectiveness</td> <td>2010</td> <td>55</td> <td>55</td> </tr> <tr> <td>2019</td> <td>55</td> <td>55</td> </tr> <tr> <td>2020</td> <td>55</td> <td>55</td> </tr> <tr> <td rowspan="3">Regulatory Quality</td> <td>2010</td> <td>55</td> <td>55</td> </tr> <tr> <td>2019</td> <td>55</td> <td>55</td> </tr> <tr> <td>2020</td> <td>55</td> <td>55</td> </tr> <tr> <td rowspan="3">Rule of Law</td> <td>2010</td> <td>55</td> <td>55</td> </tr> <tr> <td>2019</td> <td>55</td> <td>55</td> </tr> <tr> <td>2020</td> <td>55</td> <td>55</td> </tr> <tr> <td rowspan="3">Control of Corruption</td> <td>2010</td> <td>55</td> <td>55</td> </tr> <tr> <td>2019</td> <td>55</td> <td>55</td> </tr> <tr> <td>2020</td> <td>55</td> <td>55</td> </tr> </tbody> </table> | Indicator | Year                      | Latin America & Caribbean | Panama | Voice and Accountability | 2010 | 60 | 65 | 2019 | 60 | 65 | 2020 | 60 | 65 | Political Stability and Absence of Violence/Terrorism | 2010 | 55 | 55 | 2019 | 55 | 55 | 2020 | 55 | 55 | Government Effectiveness | 2010 | 55 | 55 | 2019 | 55 | 55 | 2020 | 55 | 55 | Regulatory Quality | 2010 | 55 | 55 | 2019 | 55 | 55 | 2020 | 55 | 55 | Rule of Law | 2010 | 55 | 55 | 2019 | 55 | 55 | 2020 | 55 | 55 | Control of Corruption | 2010 | 55 | 55 | 2019 | 55 | 55 | 2020 | 55 | 55 |
|   | Indicator  | Year      | Latin America & Caribbean | Panama                    |        |                          |      |    |    |      |    |    |      |    |    |   |      |    |    |      |    |    |      |    |    |                          |      |    |    |      |    |    |      |    |    |                    |      |    |    |      |    |    |      |    |    |             |      |    |    |      |    |    |      |    |    |                       |      |    |    |      |    |    |      |    |    |
|   | Voice and Accountability   | 2010      | 60                        | 65                        |        |                          |      |    |    |      |    |    |      |    |    |   |      |    |    |      |    |    |      |    |    |                          |      |    |    |      |    |    |      |    |    |                    |      |    |    |      |    |    |      |    |    |             |      |    |    |      |    |    |      |    |    |                       |      |    |    |      |    |    |      |    |    |
|   |  | 2019      | 60                        | 65                        |        |                          |      |    |    |      |    |    |      |    |    |   |      |    |    |      |    |    |      |    |    |                          |      |    |    |      |    |    |      |    |    |                    |      |    |    |      |    |    |      |    |    |             |      |    |    |      |    |    |      |    |    |                       |      |    |    |      |    |    |      |    |    |
|   |  | 2020      | 60                        | 65                        |        |                          |      |    |    |      |    |    |      |    |    |   |      |    |    |      |    |    |      |    |    |                          |      |    |    |      |    |    |      |    |    |                    |      |    |    |      |    |    |      |    |    |             |      |    |    |      |    |    |      |    |    |                       |      |    |    |      |    |    |      |    |    |
|   | Political Stability and Absence of Violence/Terrorism  | 2010      | 55                        | 55                        |        |                          |      |    |    |      |    |    |      |    |    |   |      |    |    |      |    |    |      |    |    |                          |      |    |    |      |    |    |      |    |    |                    |      |    |    |      |    |    |      |    |    |             |      |    |    |      |    |    |      |    |    |                       |      |    |    |      |    |    |      |    |    |
|   |  | 2019      | 55                        | 55                        |        |                          |      |    |    |      |    |    |      |    |    |   |      |    |    |      |    |    |      |    |    |                          |      |    |    |      |    |    |      |    |    |                    |      |    |    |      |    |    |      |    |    |             |      |    |    |      |    |    |      |    |    |                       |      |    |    |      |    |    |      |    |    |
|   |  | 2020      | 55                        | 55                        |        |                          |      |    |    |      |    |    |      |    |    |   |      |    |    |      |    |    |      |    |    |                          |      |    |    |      |    |    |      |    |    |                    |      |    |    |      |    |    |      |    |    |             |      |    |    |      |    |    |      |    |    |                       |      |    |    |      |    |    |      |    |    |
|   | Government Effectiveness   | 2010      | 55                        | 55                        |        |                          |      |    |    |      |    |    |      |    |    |   |      |    |    |      |    |    |      |    |    |                          |      |    |    |      |    |    |      |    |    |                    |      |    |    |      |    |    |      |    |    |             |      |    |    |      |    |    |      |    |    |                       |      |    |    |      |    |    |      |    |    |
|   |  | 2019      | 55                        | 55                        |        |                          |      |    |    |      |    |    |      |    |    |   |      |    |    |      |    |    |      |    |    |                          |      |    |    |      |    |    |      |    |    |                    |      |    |    |      |    |    |      |    |    |             |      |    |    |      |    |    |      |    |    |                       |      |    |    |      |    |    |      |    |    |
| 2020                                    |  | 55        | 55                        |                           |        |                          |      |    |    |      |    |    |      |    |    |   |      |    |    |      |    |    |      |    |    |                          |      |    |    |      |    |    |      |    |    |                    |      |    |    |      |    |    |      |    |    |             |      |    |    |      |    |    |      |    |    |                       |      |    |    |      |    |    |      |    |    |
| Regulatory Quality                      | 2010   | 55        | 55                        |                           |        |                          |      |    |    |      |    |    |      |    |    |   |      |    |    |      |    |    |      |    |    |                          |      |    |    |      |    |    |      |    |    |                    |      |    |    |      |    |    |      |    |    |             |      |    |    |      |    |    |      |    |    |                       |      |    |    |      |    |    |      |    |    |
|   | 2019   | 55        | 55                        |                           |        |                          |      |    |    |      |    |    |      |    |    |   |      |    |    |      |    |    |      |    |    |                          |      |    |    |      |    |    |      |    |    |                    |      |    |    |      |    |    |      |    |    |             |      |    |    |      |    |    |      |    |    |                       |      |    |    |      |    |    |      |    |    |
|   | 2020   | 55        | 55                        |                           |        |                          |      |    |    |      |    |    |      |    |    |   |      |    |    |      |    |    |      |    |    |                          |      |    |    |      |    |    |      |    |    |                    |      |    |    |      |    |    |      |    |    |             |      |    |    |      |    |    |      |    |    |                       |      |    |    |      |    |    |      |    |    |
| Rule of Law                             | 2010   | 55        | 55                        |                           |        |                          |      |    |    |      |    |    |      |    |    |   |      |    |    |      |    |    |      |    |    |                          |      |    |    |      |    |    |      |    |    |                    |      |    |    |      |    |    |      |    |    |             |      |    |    |      |    |    |      |    |    |                       |      |    |    |      |    |    |      |    |    |
|   | 2019   | 55        | 55                        |                           |        |                          |      |    |    |      |    |    |      |    |    |   |      |    |    |      |    |    |      |    |    |                          |      |    |    |      |    |    |      |    |    |                    |      |    |    |      |    |    |      |    |    |             |      |    |    |      |    |    |      |    |    |                       |      |    |    |      |    |    |      |    |    |
|   | 2020   | 55        | 55                        |                           |        |                          |      |    |    |      |    |    |      |    |    |   |      |    |    |      |    |    |      |    |    |                          |      |    |    |      |    |    |      |    |    |                    |      |    |    |      |    |    |      |    |    |             |      |    |    |      |    |    |      |    |    |                       |      |    |    |      |    |    |      |    |    |
| Control of Corruption                   | 2010   | 55        | 55                        |                           |        |                          |      |    |    |      |    |    |      |    |    |   |      |    |    |      |    |    |      |    |    |                          |      |    |    |      |    |    |      |    |    |                    |      |    |    |      |    |    |      |    |    |             |      |    |    |      |    |    |      |    |    |                       |      |    |    |      |    |    |      |    |    |
|   | 2019   | 55        | 55                        |                           |        |                          |      |    |    |      |    |    |      |    |    |   |      |    |    |      |    |    |      |    |    |                          |      |    |    |      |    |    |      |    |    |                    |      |    |    |      |    |    |      |    |    |             |      |    |    |      |    |    |      |    |    |                       |      |    |    |      |    |    |      |    |    |
|   | 2020   | 55        | 55                        |                           |        |                          |      |    |    |      |    |    |      |    |    |   |      |    |    |      |    |    |      |    |    |                          |      |    |    |      |    |    |      |    |    |                    |      |    |    |      |    |    |      |    |    |             |      |    |    |      |    |    |      |    |    |                       |      |    |    |      |    |    |      |    |    |
| Global freedom status                   | 83/100 points (citizen rights: 35/40 points, political rights: 48/60 points)<br>Classified as "free country" (Freedom House 2021)  |           |                           |                           |        |                          |      |    |    |      |    |    |      |    |    |   |      |    |    |      |    |    |      |    |    |                          |      |    |    |      |    |    |      |    |    |                    |      |    |    |      |    |    |      |    |    |             |      |    |    |      |    |    |      |    |    |                       |      |    |    |      |    |    |      |    |    |
| Corruption Perception Index (CPI)       | 111/180th place, 35/100 points (Transparency International 2020)   |           |                           |                           |        |                          |      |    |    |      |    |    |      |    |    |   |      |    |    |      |    |    |      |    |    |                          |      |    |    |      |    |    |      |    |    |                    |      |    |    |      |    |    |      |    |    |             |      |    |    |      |    |    |      |    |    |                       |      |    |    |      |    |    |      |    |    |
| E-government development index          | It ranks high among the 23 countries. A digital national ID issued. 7.87% of the people (more than 23,000 people) do not have a national ID.   |           |                           |                           |        |                          |      |    |    |      |    |    |      |    |    |   |      |    |    |      |    |    |      |    |    |                          |      |    |    |      |    |    |      |    |    |                    |      |    |    |      |    |    |      |    |    |             |      |    |    |      |    |    |      |    |    |                       |      |    |    |      |    |    |      |    |    |
| Rule of law                             | According to WGI, the level of "rule of law" is above the regional average.  |           |                           |                           |        |                          |      |    |    |      |    |    |      |    |    |   |      |    |    |      |    |    |      |    |    |                          |      |    |    |      |    |    |      |    |    |                    |      |    |    |      |    |    |      |    |    |             |      |    |    |      |    |    |      |    |    |                       |      |    |    |      |    |    |      |    |    |
| Citizen security                        | The homicide rate is lower than the Central American average, and although it has decreased since 2014, it is higher than the world average. The homicide rate in 2018 was 9.8 / 100,000 (28.1 in Central America and 6 in the world in the same year) (UNODC 2021).   |           |                           |                           |        |                          |      |    |    |      |    |    |      |    |    |   |      |    |    |      |    |    |      |    |    |                          |      |    |    |      |    |    |      |    |    |                    |      |    |    |      |    |    |      |    |    |             |      |    |    |      |    |    |      |    |    |                       |      |    |    |      |    |    |      |    |    |

Source: Survey Team

## 18.3.7 DX / Innovation

|  |   |   |
|--|---|---|
| <p>Basic indicators and statistics</p>   | <p>E-Government Ranking 1): 84th<br/>         Mobile connection index 2): 65.3<br/>         Network Infrastructure Index: 61.0<br/>         Number of Internet users 64.8<br/>         Mobile connection index 107.9<br/>         Fixed broadband rate 12.3%<br/>         7.0% increase in the number of Internet users (2021/2020)</p> | <p>Radar chart of e-government ranking</p>  <p>The radar chart shows the e-government ranking for Panama compared to Central America and the Caribbean. The indicators are OSI (Online Service Index), TII (Telecommunication Infrastructure Index), and HCI (Human Capital Index). Panama's scores are: OSI = 0.6235, TII = 0.6488, and HCI = 0.7421. The chart uses a triangular scale from 0 to 1.0.</p> |
| <p><b>Communication network</b></p>  |   |   |
| <p>Panama's telecommunications industry accounts for about 8% (4,415 USD million) 3) of GDP, especially in the ICT sector (2016), with a compound annual growth rate (CAGR) of 5.29% 3) for economic growth. Contribution is high. CAGRs for fixed and mobile broadband subscriptions in 2009-2016 are still major growth areas, with 8.33% 3) and 165% 3), respectively, with mobile connectivity accounting for 90% of all lines. Telefónica (Movistar 47.0%), Cable &amp; Wireless Panama (+ Móvil 24.2%), América Móvil (Claro 20.4%), Digicel Panama (8.4%), etc. have entered the mobile service market (in parentheses). Each brand name and its market share 4)), there is an effective competitive relationship between domestic and global companies. In particular, Digicel Panama will provide unlimited data, unlimited voice services for international calls, and a \$ 100 million investment program in Japan in 2018 to differentiate its services from other companies as part of its market strategy. Launched the only high-speed communication line LTE Pro service 5).</p>   |   |   |
| <p><b>National Strategy for Digital Transformation</b></p>   |   |   |
| <p>According to the Digital Agenda 20206), the national government's Department of Innovation (AIG) is the main body responsible for national digital policy, based on the implementation of electronic procedures and interoperability within the organization, mainly the online process of government agencies. Focuses on establishing. In particular, we will focus on digital signatures, data protection, information and service updates on Panamá Tramita 7) (administrative procedure application platform) and Portal Nacional de Pagos 8) (national payment portal), payment of corporate social security funds, customs procedures, etc. Procedures such as registration, application for public services, and tax payment can now be carried out online.</p> <p>In 2019, the Personal Data Protection Act 9) was enacted, establishing a legal framework for interoperability and development of data centers for cloud applications for public and private enterprises.</p> <p>The National Strategic Plan for Science and Technology and Innovation 10) (PENCIYT) is planned with the support of the National Government Innovation Bureau (AIG) for sustainable and comprehensive science and technology development, and the following major programs are planned. It has been implemented.</p> <p>1) Efficient use of ICT and training of IT professionals, 2) Sectoral approach to strategies that are the main pillars of national development, 3) Strengthening organizational strength and promoting cross-cutting actions within the national scientific system</p> <p>In addition, with the cooperation of the Inter-American Development Bank (IDB), by 2022, broadband penetration will be 47.5% (fixed and mobile total), Internet penetration will be 83.5%, international connections will be 88 Kbps per user, and governments such as education centers. There is a broadband strategic plan 11) aimed at improving connectivity (speeds range from 5 Mbps to 100 Mbps) with priority given to the major sectors of the Internet.</p>  |   |   |
| <p><b>Characteristic efforts</b></p>   |   |   |
| <p>The Colmena Strategic Plan 12) aims to address key multi-sectoral issues such as reducing poverty levels, improving nutritional status of young people, improving medical services, education, gender equality and employment promotion. It provides an action plan for coordination and guidance to citizens and non-governmental organizations. Especially in the education sector, school education materials are available through Educa Panamá 13) (Ministry of Education website) to reduce the social impact of Covid-19, and to optimize the education and learning process. Therefore, it has the function of a place (community) for exchanging opinions from academic, cultural, and scientific viewpoints. It is also possible to share virtual learning experiences via the online educational tool Ester e-learning platform 14).</p>   |   |   |
| <p><b>source</b></p>   |   |   |
| <p>143. E-Gov-Index: a composite indicator that consists of three indexes (Online Service Index, Telecommunication Infrastructure Index and Human Capital Index), which are equally weighted. It ranges from 0 to 1, with 1 being the most developed.</p> <p>144. Mobile Connectivity Index: an input index developed by GSMA to measure the performance against the four key enablers of mobile internet adoption – infrastructure, affordability, consumer readiness and content. (<a href="https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2016/06/Mobile-Connectivity-Launch-Report.pdf">https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2016/06/Mobile-Connectivity-Launch-Report.pdf</a>)</p> <p>145. Telecommunication Sector Policies for the Development of Information and Communication Technologies in Panama: Part I <a href="https://publications.iadb.org/publications/english/document/Telecommunication-Sector-Policies-for-the-Development-of-Information-and-Communication-Technologies-in-Panama-Part-I.pdf">https://publications.iadb.org/publications/english/document/Telecommunication-Sector-Policies-for-the-Development-of-Information-and-Communication-Technologies-in-Panama-Part-I.pdf</a></p> <p>146. Panamá: 1Q-20 Ingresos de telefonía fija, telefonía móvil y TV restringida <a href="https://otitelecom.org/documentos-de-inteligencia/estadisticas/oti-panama-telefonía-tv-restringida/">https://otitelecom.org/documentos-de-inteligencia/estadisticas/oti-panama-telefonía-tv-restringida/</a></p> <p>147. Digicel lanzó LTE-A Pro en Panamá <a href="https://www.telesemana.com/blog/2018/06/11/digicel-lanzo-lte-a-pro-en-panama/">https://www.telesemana.com/blog/2018/06/11/digicel-lanzo-lte-a-pro-en-panama/</a></p> <p>148. Digital Agenda 2020 <a href="https://aig.gob.pa/descargas/2019/12/agenda-digital-2020-visual.pdf">https://aig.gob.pa/descargas/2019/12/agenda-digital-2020-visual.pdf</a></p> <p>149. <a href="https://www.panamatramita.gob.pa/">https://www.panamatramita.gob.pa/</a></p> <p>150. Portal Nacional de Pagos listo para operar <a href="https://elcapitalfinanciero.com/portal-nacional-de-pagos-listo-para-operar/">https://elcapitalfinanciero.com/portal-nacional-de-pagos-listo-para-operar/</a></p> <p>151. Reglamentan Ley 81 de Protección de Datos Personales <a href="https://www.antai.gob.pa/reglamentan-ley-81-de-proteccion-de-datos-personales/">https://www.antai.gob.pa/reglamentan-ley-81-de-proteccion-de-datos-personales/</a></p> <p>152. National Strategic Plan of Science, Technology and Innovation <a href="https://www.senacyt.gob.pa/wp-content/uploads/2020/01/GacetaNo_28936b_202001081-1.pdf">https://www.senacyt.gob.pa/wp-content/uploads/2020/01/GacetaNo_28936b_202001081-1.pdf</a></p> |   |   |

|      |  |
|------|--|
| 153. | Estudio de Caso: El ecosistema digital y la masificación de las Tecnologías de la Información y la Comunicación (TIC) en Panamá<br><a href="https://www.itu.int/pub/D-PREF-EF-CS_PANAMA">https://www.itu.int/pub/D-PREF-EF-CS_PANAMA</a> |
| 154. | Colmena Plan Strategy<br><a href="http://www.gabinetsocial.gob.pa/planes-y-proyectos/plan-colmena/">http://www.gabinetsocial.gob.pa/planes-y-proyectos/plan-colmena/</a>   |
| 155. | <a href="http://www.educapanama.edu.pa/">http://www.educapanama.edu.pa/</a>  |
| 35.  | Ester e-learning platform<br><a href="https://ester.medica.edu.pa/">https://ester.medica.edu.pa/</a>   |

### 18.3.8 Infrastructure and Energy

|   |   |
|---|---|
| <b>Transport</b>                          |   |
| Overview                                  | Inland transportation is mainly by car. There are domestic air routes. The Panama Canal Railway has a 77km railroad between Panama City and Colon, mainly for freight services and some passenger services. |
| Leadership governance                     | Ministry of Public Works  |
| Major development partners                | JICA / WB / IADB  |
| <b>Energy and electricity</b>             |   |
| Overview                                  | Over 60% of primary energy is imported petroleum and petroleum products. 80% of the electrical energy mix is renewable energy (mainly hydro, wind, solar)   |
| Carbon neutral national plan              | National Climate Change Strategy of Panama (ENCCP, 2019)<br>Goal: 70% of energy supply renewable (Panama National Energy Plan 2015-2050, 2015), 100% carbon neutral by 2050 (NDC, 2020)                     |
| Leadership governance and utility company | Ministry of Energy (SNE)<br>National Public Service Authority (ASEP)  |
| Major development partners                | IADB  |

Source: JICA Study Team with reference to various websites of the government organization and international organization (WB / IEA / IRENA / US DOE).

### 18.3.9 Tourism

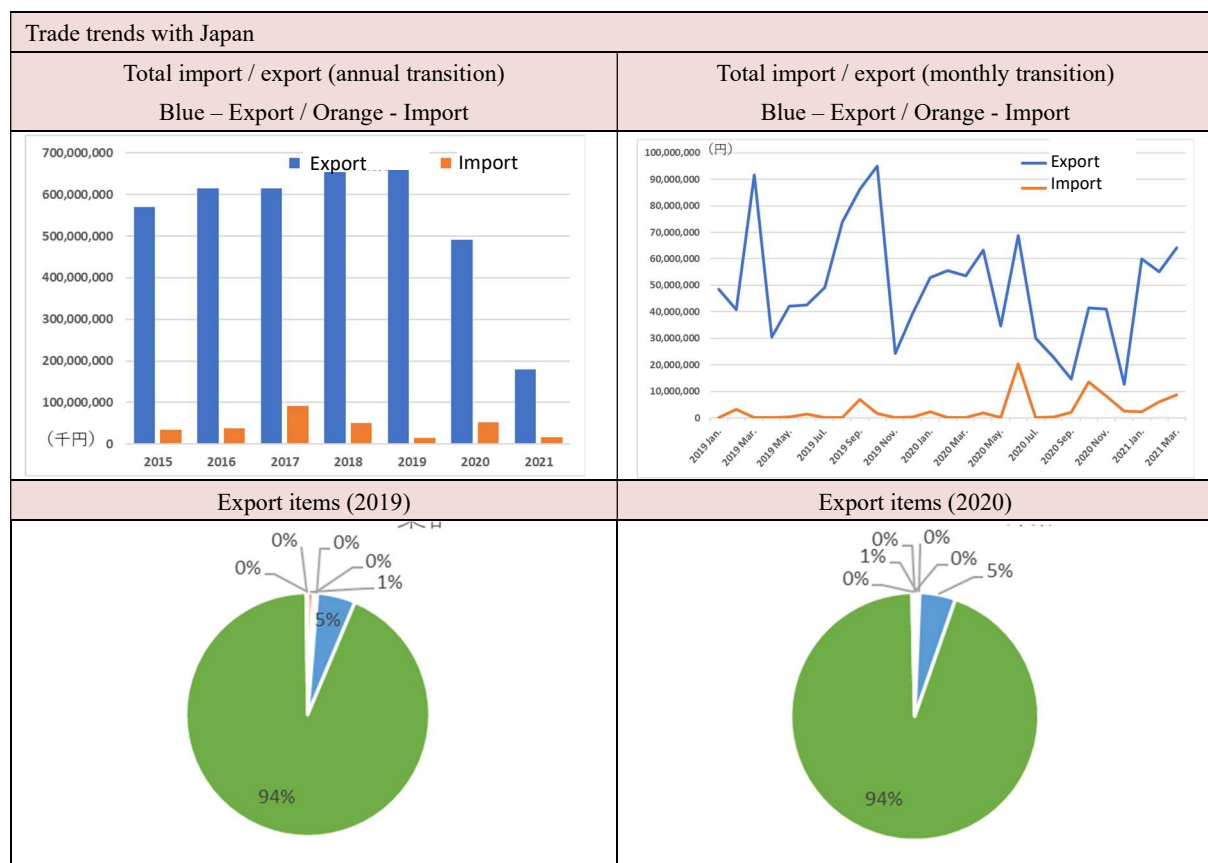
The tourism industry is not very vulnerable, but the impact of COVID-19 is relatively large.

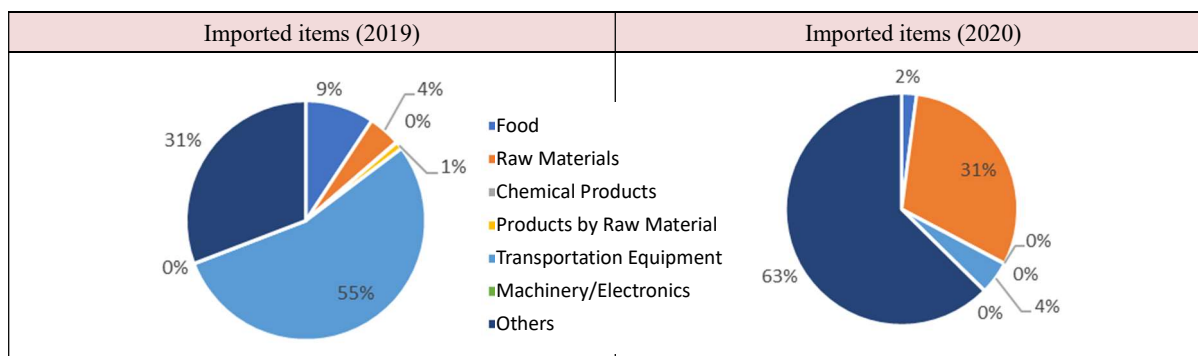
|  |  |  |
|--|--|--|
| Number of international tourist arrivals (2019)              |  | 1,753,000  |
| International Tourism Receipts (2019)                        |  | USD 4,521 million  |
| Tourism Competitiveness Ranking (2019)                       |  | 4.2 out of 7 (47th out of 140 countries)<br>Highly rated field: International openness (4.5 out of 7 points, 11th out of 140 countries)<br>Low-rated areas: Human resources and labor market (4.1 out of 7 points, 109th out of 140 countries) |
| Tourism Dependency Index (2019)                              |  | 18.5 (38th out of 166 countries)   |
| Government of Japan policy                                   | Number of JICA projects in the last 10 years   | none   |
|  | References to the Country Assistance Policy  | none   |
|  | Interest in pilot projects   | N / A  |
| Tourism industry vulnerability                               | Contribution of Travel & Tourism to GDP (2019)   | 13.6% (13th out of 23 countries)   |
|  | Contribution of Travel & Tourism to employment (2019)  | 14.7% (12th out of 23 countries)   |
|  | Ratio of international spending (2019)   | 80% (11th out of 23 countries)   |
|  | Top 3 countries of origin of visitors (2019)   | USA (18.82%)<br>Colombia (12.58%)<br>Venezuela (6.44%)   |
| Importance of tourism  | Ratio of the budget amount of tourism-related ministries to the national budget amount (2019)            | 0.6% (11th out of 16 countries)<br>National budget: PAB 23,669,270,825<br>Budget of tourism-related ministries: PAB 133,491,704  |
|  | Whether or not it is mentioned as a priority sector in the National Economic and Social Development Plan | none   |
|  | Existence of effective national tourism policies / strategies / plans                                    | Yes (Plan Maestro de Turismo Sostenible de Panamá 2020-2025)   |
| Impact of COVID  | Changes in the contribution of Travel & Tourism to GDP (2019 → 2020)                                     | -68.0% (3rd out of 23 countries)   |
|  | Changes in the contribution of Travel & Tourism to employment (2019 → 2020)                              | -31.6% (4th out of 23 countries)   |
| Number of government support measures for the tourism sector |  | 6 (Fiscal policy: 2, monetary policy: 2, resumption of tourism: 1, health and safety protocol: 1)  |

Source: Survey Team

### 18.3.10 Public-private partnership

|  | item   | Contents     |
|--|--|--------------|
| No. of JICA Public-Private Partnership Projects (After 2012)                 | Cooperation preparatory survey (overseas investment and financing) (former PPP infrastructure project)           | 0 cases      |
|  | Overseas investment and loan   | 0 cases      |
|  | SME Partnership Promotion Survey (support for Small-sized Enterprise)  | 0 cases      |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for small- and medium- sized enterprise) | 0 cases      |
|  | SDGs Business Verification Survey with Private Sector (support for small- and medium- sized enterprise)          | 0 cases      |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for large enterprise)                    | 0 cases      |
|  | SDGs Business Verification Survey with Private Sector (support for large enterprise)                             | 0 cases      |
| Total number of Japanese private companies entering the market (2019 survey) | Total number of business locations   | 45 companies |
|  | Overseas branches of Japanese companies,   | 9 companies  |
|  | Local corporations wholly owned by Japanese companies and their branches   | 18 companies |
|  | Branch offices wholly owned by Japanese companies and their branches   | 7 companies  |
|  | joint ventures (local corporations in which Japanese companies have a direct or indirect stake of 10% or more)   | 5 companies  |
|  | joint ventures (Branch offices in which Japanese companies have a direct or indirect stake of 10% or more)       | 0 companies  |
|  | companies established overseas by Japanese nationals (in which Japanese nationals have a stake of 10% or more)   | 4 companies  |
|  | Unknown classification   | 2 companies  |
| Number of Japanese residents (2020 survey)                                   | Total  | 367 people   |
|  | Long-term residents  | 313 people   |
|  | Permanent resident   | 54 people    |
| Business Environment   | Doing Business 2020 Rank   | 86th place   |
| PPP Project  | Existence of PPP law scheme  | ○            |
|  | PPP project with Japanese companies  | 0 cases      |





### Gathering information about the PPP system

| N°  | Task Item   | Inquiries/comments/status<br>Title of submitted file   | Source/URL   |
|-----|---|--|--|
| 1   | <b>PRIORITY 4_PPP Sector</b>  |  |  |
| 1.1 | PPP Projects in selective countries<br>PPP rules and regulations in Central America and Caribbean Countries |  | All below can be useful  |
| A   | PPP laws and Regulations<br>if there is any, when, and how  | Law 93<br><br>Executive Decree 840   | <a href="https://www.gacetaoficial.gob.pa/pdfTemp/28864_B/74982.pdf">https://www.gacetaoficial.gob.pa/pdfTemp/28864_B/74982.pdf</a><br><br><a href="https://www.gacetaoficial.gob.pa/pdfTemp/29189/GacetaNo_29189_20210104.pdf">https://www.gacetaoficial.gob.pa/pdfTemp/29189/GacetaNo_29189_20210104.pdf</a> |
| B   | PPP Unit Organization<br>if there is any, how structured  | The governing body is created, which will be made up of:<br>1. The Minister of the Presidency.<br>2. The Minister of Economy and Finance.<br>3. The Minister of Public Works.<br>4. The Minister of Commerce and Industries.<br>5. The Minister of Foreign Relations.<br>6. The Comptroller General of the Republic, who will only act with the right to speak.<br>The governing body will be chaired by the Minister of the Presidency. (Law 93 - Article 10 Page 8)  | <a href="https://www.gacetaoficial.gob.pa/pdfTemp/28864_B/74982.pdf">https://www.gacetaoficial.gob.pa/pdfTemp/28864_B/74982.pdf</a>  |
| C   | PPP sectors<br>in what sectors are the PPPs allowed   | This legislation is applicable to almost any type of project except for some sectors and institutions considered key, these are:<br><br><ul style="list-style-type: none"> <li>• The Institute of National Aqueducts and Sewers</li> <li>• The Panama Canal Authority</li> <li>• The Social Security Fund</li> <li>• The National Bank of Panama</li> <li>• The Savings Bank</li> <li>• The Agricultural Development Bank</li> <li>• The National Mortgage Bank</li> <li>• The Agricultural Insurance Institute</li> <li>• The Superintendency of the Securities Market and the Superintendency of Banks of Panama</li> <li>• The Public Security Services</li> <li>• Medical Health Services</li> <li>• Official Education Services</li> <li>• Metallic Mineral Extraction Concessions</li> </ul> (Law N°93 - article 2 page 1) | <a href="https://www.gacetaoficial.gob.pa/pdfTemp/28864_B/74982.pdf">https://www.gacetaoficial.gob.pa/pdfTemp/28864_B/74982.pdf</a>  |
| D   | Proposal Types (Solicited or Unsolicited)<br>unsolicited  | Only requested type is admitted (Law N° 93 - Article 7 page )  | <a href="https://www.gacetaoficial.gob.pa/pdfTemp/28864_B/74982.pdf">https://www.gacetaoficial.gob.pa/pdfTemp/28864_B/74982.pdf</a>  |
| E   | PPP Forms<br>BOT,BTO,DB,,,what form are allowed   | There is information about the Operation and Maintenance of the Panama Cruise Terminal. No more information was found  | <a href="https://www.panamacompra.gob.pa/Inicio/#/vistaPreviaCP?NumLc=2019-2-03-0-08-LV-007549&amp;esap=1&amp;nnc=0&amp;it=1">https://www.panamacompra.gob.pa/Inicio/#/vistaPreviaCP?NumLc=2019-2-03-0-08-LV-007549&amp;esap=1&amp;nnc=0&amp;it=1</a>  |
| F   | PPP types<br>Availability payment, service purchase   | <ul style="list-style-type: none"> <li>• Self-financed: those that do not need any institutional support to generate income and achieve acceptable profitability. The recovery of the investment resulting from the collection of rates, tolls, fees or charges to the end user of the service.</li> <li>• Co-financed: those that, during the term of the PPP contract or part of it, need financial resources from the State. This will occur in those cases in which there is an absence of payments by the end user or if there is, this is sufficient for the viability of the project. (Law N°93 - Article 5 Page 5)</li> </ul>  | <a href="https://www.gacetaoficial.gob.pa/pdfTemp/28864_B/74982.pdf">https://www.gacetaoficial.gob.pa/pdfTemp/28864_B/74982.pdf</a>  |
| G   | PPP Project Trends<br>how much PPP projects in the last 10 years  | "Also, the World Bank registers 88 PPP contracts, with an investment of more than 9 billion dollars since 1994"  | <a href="https://www.quijano.com/asociaciones-publicas-privadas-en-panama/?lang=es">https://www.quijano.com/asociaciones-publicas-privadas-en-panama/?lang=es</a>  |
| H   | Participation of Japanese firms in PPP Projects<br>if any (check news source)                               | No information found   |  |
|     | Any notable points for each country<br>if any   | Link was consulted in January 2017 and it was working  | <a href="https://ppi.worldbank.org/en/snapshots/country/panama">https://ppi.worldbank.org/en/snapshots/country/panama</a>  |

Source: Survey Team

## 19. Saint Kitts and Nevis

### 19.1 Country overview (basic information)

#### 19.1.1 Basic information

Saint Kitts and Nevis, or Saint Kitts and Nevis, is one of the two islands of the United Kingdom, Saint Kitts and Nevis, located in the Leeward Islands within the Lesser Antilles of the West Indian Islands. A national constitutional sovereignty nation. It is an island country, with British Anguilla to the northwest, Antigua and Barbuda to the east, and Montserrat to the southwest across the sea. The capital is Basseterre. Commonwealth of Nations member states. It is one of the mini-states. Both the area and the population are the smallest in the Americas, and the year of independence is also the newest. The larger of the two islands is St. Christopher, which Christopher Columbus named after St. Christopher, the origin of his name. Its English form is Saint Kitts, but since the abbreviation for the name Christopher is Kitts, it has come to be called St. Kitts. Traditionally, it was an agricultural island country centered on sugar, but production stopped in July 2005. Tourism is now the main industry. This is because the sugar industry is a symbol of slavery and is no longer profitable since the 1980s. As of 2002, sugarcane production was 190,000 tons, and sugar production was 19 thousand tons. Both were the most produced agricultural and industrial products. As the assembly of electrical machinery has been established as an industry, the ratio of electrical machinery to exports reached 62.9% as of 2001. On the other hand, sugar was 21.0%. The main export destination is the United States, which accounts for 71.5%. The Eastern Caribbean Central Bank, which issues the Eastern Caribbean dollar, is located in the country's capital, Basseterre. Since there is no large industry, a method of attracting foreign investors and funds by giving preferential treatment to income tax and inheritance tax has been adopted as one of the tax havens. Saint Kitts and Nevis has approved the Republic of China (Taiwan).

#### 19.1.2 General circumstances

|             |  |                 |  |
|-------------|--|-----------------|--|
| 1 area      | 260 square kilometers (almost the same as Iriomote Island) | 2 Population    | 52,000 (2018 World Bank)   |
| 3 Capital   | Basseterre   | 4 ethnic groups | African (92.5%), mixed race (3.0%), Caucasian (2.1%), East Indian (1.5%), etc. |
| 5 languages | English (official language)                                | 6 religion      | Christianity (Church of England, Protestantism, Catholicism, etc.)             |

Source: Ministry of Foreign Affairs HP Saint Kitts and Nevis Federal Basic Data

#### 19.1.3 Economic overview

|                          |  |                              |  |
|--------------------------|--|------------------------------|--|
| 1 Major industry         | Tourism, manufacturing (clothing, footwear, etc.)  | 2 GNI<br>3 GNI / person      | US \$ 26,320 (2019, WDI)                                     |
| 4 Economic growth rate   | 2.9% (2018, World Bank)  | 5 Unemployment rate          | 4%, (2017, Ministry of Finance, Nevis Island Administration) |
| 6 Price increase rate    | -0.23% (2018), 0.6% (2019 estimate) (IMF)  |                              |  |
| 7 Total trade amount     | Export: US \$ 5,300 (2018 WTO)<br>Import: US \$ 330 million (2018 WTO)   |                              |  |
| 8 Major trade items      | Export: Electronic equipment, machinery, beverages, tobacco<br>Imports: electronics, machinery, fuel, food   |                              |  |
| 9 Major trading partners | Exports: USA, Saint Lucia, Trinidad and Tobago, Antigua and Barbuda<br>Imports: USA, EU, Trinidad and Tobago, Canada (2018, WTO)   |                              |  |
| 10 currencies            | Eastern Caribbean Dollar (EC \$)   | 11 Foreign currency reserves | na   |
| 12 National budget       | USD285,966,278 (2019)  | 13 External debt balance     | na   |
| 14 Economic overview     | Traditionally, it relied heavily on agriculture, especially sugar production, but as a result of efforts to promote non-sugar agricultural products such as citrus fruits, tourism, and offshore finance under economic diversification measures, tourism is now being promoted. Economic structure centered on the service industry, including. Revenues from the service industry account for three-quarters of GDP. In addition, the economic structure is easily affected by external factors such as natural disasters such as hurricanes and the growth of the tourism industry, which is influenced by trends in the world economy. |                              |  |



|  |   |
|--|---|
|  | <p>In the early 1990s, the growth of the tourism industry drove the growth of light industrial products, the manufacturing industry centered on food products, and agriculture, respectively, and maintained a relatively high growth rate and a low unemployment rate. However, in the latter half of the 1990s, the economy of the country, including agriculture and tourism, was seriously damaged by the damage caused by hurricanes and the terrorist attacks on the United States in 2001. In 2005, the sugar industry was closed and the economy changed to a tourism-centered economy. Tourism revenues have declined significantly due to the global economic downturn caused by the 2008 Lehman Brothers collapse, but they continue to grow due to the revitalization of industries such as the construction industry, manufacturing industry, and tourism industry, as well as investment-based citizenship acquisition programs. In recent years, the economy has grown positively, driven by the strong tourism industry. In particular, the growth of tourists from Europe and the United States by cruise ships has been strong, exceeding 1 million for the second consecutive year in 2018 and 2019. In this trend, a new terminal at the port opened in November 2019, and the number of large cruise ships that can call at one time has increased from three to five.</p> |
|--|---|

Source: Ministry of Foreign Affairs HP Saint Kitts and Nevis Federal Basic Data

## 19.1.4 Country-specific development cooperation policy

### (1) Government of Japan Development Cooperation Policy by Country

**Table 19-1 Overview of Japan's ODA to Saint Kitts and Nevis**

|  |
|--|
| 1. 1. Overview   |
| <p>Japan's economic cooperation with Saint Kitts and Nevis began with the acceptance of trainees in 1987, dispatched experts in 1996, grant aid for grassroots and human security in 1997, and grant aid for fisheries in 2000. Started. Japan is currently implementing technical cooperation and grant-in-aid for aid in the fields of disaster prevention / environment and fisheries as one of the major donor countries.</p>  |
| 2. 2. Aim of development cooperation   |
| <p>There are many island nations in the Caribbean region where the members of the Caribbean Community (Calicom) including Saint Kitts and Nevis are located, and natural disasters such as hurricanes, earthquakes, and tsunamis occur frequently, and marine biological resources are sustainable. It has something in common with Japan in that it promotes various uses. In addition to being vulnerable to climate change and natural disasters, Calicom member countries are based on industries that have a small population and economy and are susceptible to external factors such as agriculture, fisheries, and tourism. All 14 countries are included in the list of small island developing states published by the United Nations Secretariat. In order to overcome the vulnerabilities peculiar to small island developing states in the Calicom countries, it is necessary to cooperate by utilizing Japan's technology and knowledge in addition to deepening bilateral relations and socio-economics of each country. It is important from the viewpoint of financial stability and sustainable growth of the entire region.</p>   |
| 3. 3. Basic policy   |
| <p>In the Development Cooperation Charter, even if the per capita income is at a certain level, for countries with special vulnerabilities such as small island developing states, necessary cooperation will be provided according to the actual development needs and burden capacity of each country. For the Caribbean Community (Calicom) member countries, the first is based on the Japan-Calicom Joint Ministerial Statement adopted at the 4th Japan-Calicom Foreign Ministers' Meeting held in November 2014. In order to "cooperate for sustainable development including overcoming vulnerabilities peculiar to small island developing states", we will develop cooperation that makes use of Japan's technology and knowledge. In accordance with this policy, we will also provide necessary cooperation to Saint Kitts and Nevis, who have graduated from the OECD / DAC list of recipient countries / regions, based on the results of the survey on the need for assistance. At that time, we will support the overcoming of the vulnerabilities peculiar to small island developing states by supporting environmentally friendly sustainable social development and disaster prevention efforts. At the 5th Japan-Calicom Foreign Ministers' Meeting held in September 2016, we reconfirmed that we will cooperate in accordance with this policy.</p> |
| 4. Priority areas  |
| <p>(1) Disaster prevention / environment: The results of a survey on the need for support in the fields of frequent hurricanes, strengthening capacity to respond to natural disasters such as floods, promotion of energy conservation and conversion to renewable energy, waste management, etc. Based on this, we will develop the necessary support to overcome the vulnerabilities peculiar to small island developing states. Also pay attention to sharing knowledge with other Calicom member countries.</p> <p>(2) Fisheries: Cooperation for the sustainable development of the fishery industry will be implemented to the extent necessary from the perspective of overcoming the vulnerabilities peculiar to small island developing states, based on the results of the survey on the need for support.</p>  |

Source: Ministry of Foreign Affairs HP Saint Kitts and Nevis Federal Data Collection 2017



**Table 19-2 National Development Cooperation Policy for Saint Kitts and Nevis (September 2016)**

| 3. 3. Priority field (medium goal)    |   |
|---------------------------------------|---|
| (1) Disaster prevention / environment | We are frequently hit by natural disasters such as hurricanes and floods, and we will provide support in the fields of disaster prevention and climate change countermeasures, which are urgent issues. Cooperate to promote the introduction of renewable energy and energy conservation.  |
| (2) Fisheries                         | The fishery industry contributes to the supply of high-quality animal protein to the people and plays an important role from the viewpoint of securing employment opportunities for local residents. Faced with issues such as lack of human resources, we will continue to cooperate for the sustainable development and management of the fishery industry. |
| (3) Others                            | Since waste management is important for St. Christopher Nevis, who is focusing on promoting the tourism industry, separate disposal of recyclable waste (OA equipment, white goods, industrial waste, etc.) and establishment of a final disposal site Is still an issue.   |

Source: Survey Team

### 1) Survey on COVID-19 by development partners

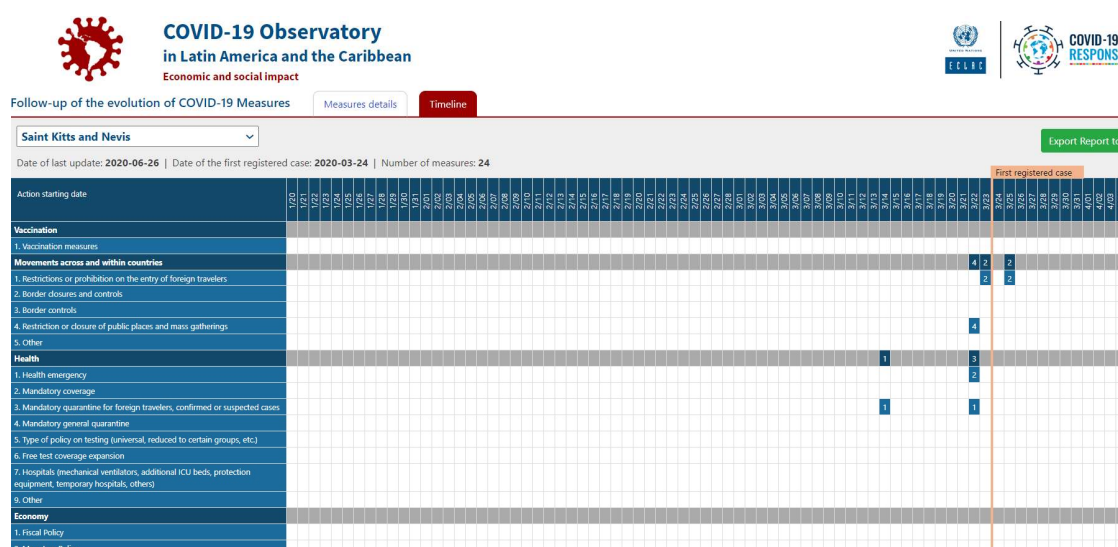
We extracted sector names and specific quantitative figures that have a large impact on the country-specific analysis described in various reports of development partners. Reports from the World Bank, OECD, BCIE, SICA, and the Ministry of Economy, Trade and Industry of Japan suggest the importance of introducing digitalization and innovation (Fintech, Agrotech, Autotech, etc.), and incorporate the survey results of these development partners. I arranged it accordingly.

World Bank: "Growth and Revitalization" 2021 Semi-Annual Economic Report (March 2021)

- ✓ OECD: COVID-19 in LAC, Regional socio-economic implications and policy priorities (December 2020)
- ✓ BCIE: Impacto Económico del COVID-19 (April 2020)
- ✓ SICA: Estimación del Impacto Económico del COVID-19 en Centroamérica y República Dominicana (April 2020)
- ✓ Ministry of Economy, Trade and Industry of Japan: "The ideal way of economic and industrial policy based on the influence of the new corona virus" (June 2020), Accelerating digitalization and onlineization, gig economy, innovation in the transition period to a new daily life 1) Medical care / health, 2) Digital: Infrastructure development premised on the arrival of a digital society, 3) Green: Response to climate change problems, Energy security, 4) Emphasizes resilience.

### 19.1.5 Policies for COVID-19 measures taken by governments of each country

Various policies for COVID-19 taken by the government are described on the ECLAC homepage "COVID-19 Observatory" by country, time series, and field, and can be analyzed.



Source: <https://cepalstat-prod.cepal.org/forms/covid-countrysheet/index.html?table=2&country=KNA>

In this survey, the 10 policies implemented by Saint Kitts and Nevis posted on this website are classified by sector as much as possible.

**1) Infection spread and alleviation of aggravation and death**

No material was available.

**2) Support for affected industries and people**

**Table 19-3 Support for Affected Industries and People (Saint Kitts and Nevis)**

| Various government policies (COVID-19 Ovservatory for LAC) |    |  |  |
|--|----|--|--|
| Socioeconomic policy                                       | 3  |  |  |
| Health care & nutrition                                    | 2  |  |  |
| Education  | 1  |  |  |
| Agriculture & rural development                            | 0  |  |  |
| Private sector   | 0  |  |  |
| Environment & disaster prevention                          | 0  |  |  |
| Governance and social security                             | 3  |  |  |
| DX and innovation  | 0  |  |  |
| Infrastructure & energy                                    | 0  |  |  |
| Tourism  | 0  |  |  |
| PPP  | 0  |  |  |
| Others (b)   | 1  |  |  |
| total  | 10 |  |  |

Source: Survey Team

**3) Arrangement of various policies for COVID-19 taken by the government**

COVID-19 Observatory for Latin America and Caribbean (ECLAC) organized by governments

**Table 19-4 Government-directed COVID-19 Policy Categories (Saint Kitts and Nevis)**

**Follow-up of the evolution of COVID-19 Measures**

| <b>Vaccination</b>  | <b>Economy</b>   | <b>Social protection</b>  |
|---|--|---|
| 1. Vaccination measures   | 1. Fiscal Policy   | 1. Cash transfers (new transfers, increase in existing transfers, expansion of cash transfers to new recipients, early disbursement of transfers) |
| <b>Movements across and within countries</b>  | 2. Monetary Policy   | 2. Food transfers / In-kind transfers   |
| 1. Restrictions or prohibition on the entry of foreign travelers  | 3. Business policy   | 3. Guarantee of basic services  |
| 2. Border closures and controls   | 4. Restriction of economic activity (including shops and shopping centers)                             | <b>Education / schools</b>  |
| 3. Border controls  | 5. Price and quantity controls   | 1. Suspension of classes  |
| 4. Restriction or closure of public places and mass gatherings  | 6. Economic Stimulus (includes aggregate value of fiscal measures and separately of credit guarantees) | 2. Provision of tools for distance learning (online platforms, TV, radio, distance-learning materials)  |
| 5. Other  | 7. Regulation of the personal hygiene and cleaning products market                                     | 3. Maintenance of school feeding programme (indicating under which modalities)  |
| <b>Health</b>   | 8. Debt relief and suspension of credit payments (individuals, microentrepreneurs)                     | <b>Gender</b>   |
| 1. Health emergency   | 9. Other   | 1. Gender-based violence against women  |
| 2. Mandatory coverage   | <b>Labor</b>   | 2. Care economy   |
| 3. Mandatory quarantine for foreign travelers, confirmed or suspected cases                                   | 1. Labor Protection  | 3. Employment and income generation   |
| 4. Mandatory general quarantine   | 2. Elective work leave   | 4. Benefits, transfers and other social protection measures   |
| 5. Type of policy on testing (universal, reduced to certain groups, etc.)                                     | 3. Reduction of working hours  | 5. Women's participation in the digital era   |
| 6. Free test coverage expansion   | 4. Prohibition of dismissal from work  | 6. Other  |
| 7. Hospitals (mechanical ventilators, additional ICU beds, protection equipment, temporary hospitals, others) | 5. Other   |   |

Source: Survey Team

## 19.2 Macroeconomic analysis and selection of priority countries

### 19.2.1 Macroeconomic analysis

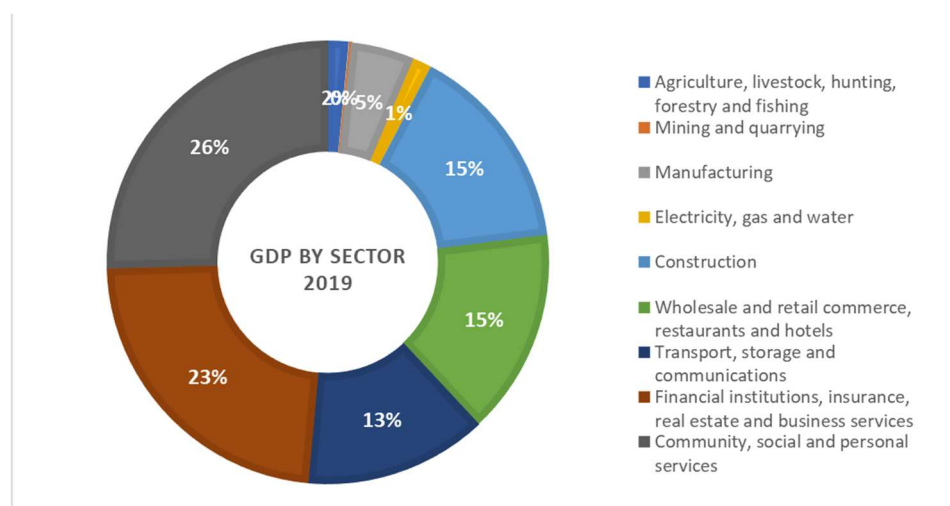
#### (1) Industrial composition

**Table 19-5 Industrial Composition (Saint Kitts and Nevis)**

Table: GDP by sector (En millones de dólares del Caribe Oriental a precios constantes de 2006)

|  | 2011    | 2012    | 2013    | 2014    | 2015    | 2016    | 2017    | 2018    | 2019a/  | 2020 b/ |
|--|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Agriculture, livestock, hunting, forestry and fishing                | 23.6    | 21.7    | 21.0    | 21.1    | 20.7    | 18.9    | 23.9    | 24.8    | 30.6    | 24.8    |
| Mining and quarrying   | 2.0     | 2.0     | 3.4     | 3.6     | 3.4     | 3.7     | 3.4     | 4.3     | 4.5     | 4.0     |
| Manufacturing  | 97.5    | 89.3    | 91.0    | 92.8    | 92.9    | 83.0    | 81.2    | 87.6    | 94.8    | 89.1    |
| Electricity, gas and water   | 25.0    | 23.5    | 23.7    | 24.1    | 24.8    | 24.5    | 24.7    | 25.9    | 28.4    | 27.2    |
| Construction   | 219.6   | 199.6   | 247.9   | 284.7   | 306.6   | 330.5   | 352.9   | 321.7   | 312.6   | 262.6   |
| Wholesale and retail commerce, restaurants and hotels                | 274.4   | 267.8   | 278.5   | 286.8   | 293.9   | 302.3   | 295.1   | 309.5   | 307.7   | 159.5   |
| Transport, storage and communications                                | 205.5   | 200.8   | 203.1   | 221.0   | 249.0   | 249.8   | 260.5   | 273.2   | 274.0   | 198.4   |
| Financial institutions, insurance, real estate and business services | 405.0   | 420.2   | 434.6   | 451.5   | 454.7   | 466.4   | 451.5   | 465.3   | 473.1   | 458.5   |
| Community, social and personal services                              | 429.6   | 427.5   | 435.4   | 453.0   | 430.3   | 464.7   | 478.8   | 499.5   | 520.3   | 529.8   |
| Total  | 1,682.3 | 1,652.2 | 1,738.7 | 1,838.6 | 1,876.3 | 1,943.8 | 1,972.1 | 2,011.8 | 2,046.0 | 1,753.9 |

Source: ECLAC



Source: Survey Team

## (2) Trends in major economic indicators

**Table 19-6 Trends in Major Economic Indicator (Saint Kitts and Nevis)**

Table 1 SAINT KITTS AN NEVIS: MAIN ECONOMIC INDICATORS (Annual growth rates)

|  | 2011   | 2012   | 2013   | 2014   | 2015   | 2016   | 2017   | 2018   | 2019a/ | 2020 b/ |
|--|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------|
| Gross domestic product (Annual growth rates c/)                                      | 1.8    | -2.2   | 5.4    | 6.3    | 1.0    | 2.8    | -2.0   | 2.9    | 2.8    | -15.1   |
| Per capita gross domestic product (Annual growth rates c/)                           | 0.9    | -3.1   | 4.5    | 5.4    | 0.2    | 2.0    | -2.8   | 2.1    | 2.1    | -15.9   |
| Gross domestic product, by sector (Annual growth rates c/)                           |        |        |        |        |        |        |        |        |        |         |
| Agriculture, livestock, hunting, forestry and fishing                                | 14.4   | -8.3   | -3.2   | 0.6    | -1.9   | -8.8   | 26.6   | 3.7    | 16.2   | -19.1%  |
| Mining and quarrying   | -7.4   | -2.0   | 75.4   | 5.6    | -5.5   | 9.7    | -10.2  | 29.2   | 2.1    | -10.1%  |
| Manufacturing  | -9.2   | -8.4   | 2.0    | 2.0    | 0.1    | -10.6  | -2.1   | 7.9    | 1.4    | -6.0%   |
| Electricity, gas and water   | 4.2    | -6.2   | 1.0    | 1.6    | 2.9    | -1.4   | 1.1    | 4.7    | 6.1    | -4.2%   |
| Construction   | -12.4  | -9.1   | 24.2   | 14.8   | 7.7    | 7.8    | 6.8    | -8.8   | 2.0    | -16.0%  |
| Wholesale and retail commerce, restaurants and hotels                                | 11.7   | -2.4   | 4.0    | 3.0    | 2.5    | 2.9    | -2.4   | 4.8    | 5.8    | -48.2%  |
| Transport, storage and communications  | 1.6    | -2.3   | 1.1    | 8.8    | 12.7   | 0.3    | 4.3    | 4.8    | 3.5    | -27.6%  |
| Financial institutions, insurance, real estate and business services                 | -3.2   | 3.8    | 3.4    | 3.9    | 0.7    | 2.6    | -3.2   | 3.1    | 1.9    | -3.1%   |
| Community, social and personal services  | 0.0    | -0.5   | 1.9    | 4.1    | -5.0   | 8.0    | 3.0    | 4.3    | 2.8    | 1.8%    |
| Balance of Payments (Millions of dollars)  |        |        |        |        |        |        |        |        |        |         |
| Current account balance  | -91.9  | -49.5  | -32.7  | 0.9    | -79.9  | -123.6 | -111.7 | -58.0  | -93.5  | -69.0   |
| Goods balance  | -189.2 | -172.6 | -195.7 | -233.6 | -276.2 | -310.0 | -303.2 | -327.7 | -339.6 | -177.7  |
| Exports, f.o.b.  | 67.8   | 62.9   | 56.6   | 56.7   | 34.3   | 24.4   | 29.2   | 26.9   | 27.7   | 48.2    |
| Imports, f.o.b.  | 257.0  | 235.5  | 252.3  | 290.3  | 310.4  | 334.3  | 332.4  | 354.6  | 367.3  | 225.9   |
| Services trade balance   | 76.3   | 99.4   | 140.6  | 313.9  | 280.1  | 257.7  | 266.2  | 345.0  | 331.2  |         |
| Income balance   | -25.5  | -21.7  | -22.7  | -67.6  | -64.8  | -58.7  | -48.9  | -46.7  | -55.2  |         |
| Net current transfers  | 46.6   | 45.4   | 45.1   | -11.8  | -19.1  | -12.7  | -25.8  | -28.6  | -30.0  |         |
| Capital and financial balance (Millions of dollars)                                  |        |        |        |        |        |        |        |        |        |         |
| Net foreign direct investment d/   | 109.6  | 108.4  | 136.2  | 151.3  | 133.2  | 124.4  | 42.1   | 35.5   | 90.1   |         |
| Other capital movements d/   | 22.8   | -34.7  | -63.8  | -123.9 | -91.8  | 31.6   | 113.7  | 20.8   | 22.7   |         |
| Foreign remittance from abroad for 2019 and 2020                                     | 142.2  | 52.0   | 49.7   | -40.2  | -23.4  | 97.4   | 106.9  | 9.7    | 57.6   |         |
| Microfinance dispatched and the sectors that received microfinance for 2019 and 2020 |        |        |        |        |        |        |        |        |        |         |

Source: Economic Survey of Latin America and the Caribbean 2020: Main conditioning factors of fiscal and monetary policies in the post-COVID-19 era

### 19.2.2 Impact analysis and identification of key sectors

#### (1) Impact assessment results for each sector by AHP analytic hierarchy process based on economic indicators

**Table 19-7 Results of Sector Impact Analysis by COVID-19 (St. Kitts and Nevis)**

| ECLAC category   | Changes around COVID-19 | Trends before COVID-19 | Total GDP ratio of the sector | comprehensive evaluation |   |
|--|-------------------------|------------------------|-------------------------------|--------------------------|---|
| Importance (weight)  | 0.4590                  | 0.0660                 | 0.0750                        |                          |   |
| Agriculture, livestock, hunting, forestry and fishing                | 7                       | 8                      | 3                             | 0.088                    | 3 |
| Mining and quarrying   | 5                       | 9                      | 1                             | 0.066                    | 5 |
| Manufacturing  | 4                       | 1                      | 4                             | 0.0489                   | 6 |
| Electricity, gas and water   | 3                       | 3                      | 2                             | 0.0383                   | 7 |
| Construction   | 6                       | 6                      | 7                             | 0.082                    | 4 |
| Wholesale and retail commerce, restaurants and hotels                | 9                       | 5                      | 6                             | 0.109                    | 1 |
| Transport, storage and communications                                | 8                       | 7                      | 5                             | 0.100                    | 2 |
| Financial institutions, insurance, real estate and business services | 2                       | 2                      | 8                             | 0.037                    | 8 |
| Community, social and personal services                              | 1                       | 4                      | 9                             | 0.031                    | 9 |

Source: Survey Team

#### 1) ECLAC Sector Classification Amendments to the Sector Classification

In line with the method described in the main volume, the Sector Classification is divided into the Vertical Sector and the Cross-Cutting Sector, the ECLAC classification sector is allocated to the Vertical Sector Classification, and the evaluation of various policies related to COVID-19 taken by the government along with the results of the partner survey and the indicators of the national development

cooperation policy, the ranking of priority sectors are calculated using the four indicators, which are described in the table below.

**Table 19-8 Ranking of Priority Sectors (Saint Kitts and Nevis)**

|                                   | Economic Indicator Analysis | Government Policy on COVID-19 | Survey on COVID-19 by Development Partners | Country Development Cooperation Policy | Base Case |   | Priority |
|-----------------------------------|-----------------------------|-------------------------------|--|--|-----------|---|----------|
| Importance (weight)               | 0.6000                      | 0.2000                        | 0.1000                                     | 0.1000                                 |           |   |          |
| Social and Economic Policy        | 0.0367                      | 0.0600                        | 0.0000                                     | 0.0000                                 | 0.0967    |   | ○        |
| Health and Nutrition              | 0.0311                      | 0.0400                        | 0.0000                                     | 0.0000                                 | 0.0711    | 5 |          |
| Education                         | 0.0311                      | 0.0200                        | 0.0000                                     | 0.0000                                 | 0.0511    | 6 |          |
| Agriculture and Rural Development | 0.0881                      | 0.0000                        | 0.0125                                     | 0.0167                                 | 0.1173    | 2 | ○        |
| Manufacturing                     | 0.0489                      | 0.0000                        | 0.0125                                     | 0.0167                                 | 0.0781    | 4 |          |
| Environment/ Disaster Management  | 0.0311                      | 0.0000                        | 0.0000                                     | 0.0333                                 | 0.0644    |   | ○        |
| Governance and Security           | 0.0311                      | 0.0600                        | 0.0000                                     | 0.0000                                 | 0.09107   |   | ○        |
| DX Innovation                     | 0.0000                      | 0.0000                        | 0.0375                                     | 0.0000                                 | 0.0375    |   | ○        |
| Infrastructure and Every          | 0.0620                      | 0.0000                        | 0.0125                                     | 0.0167                                 | 0.09112   | 3 | ○        |
| Tourism                           | 0.0970                      | 0.0000                        | 0.0250                                     | 0.0167                                 | 0.1387    | 1 | ○        |
| Public-Private Partnership        | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0000                                 | 0.0000    |   | ○        |

Source: Survey Team

## (2) Sensitivity analysis

### 1) Analysis case settings

Based on the above methodology, the following case settings were made.

**Table 19-9 Sensitivity Analysis Case-based Weighting Settings (Saint Kitts and Nevis)**

|  | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|--|-----------|------------------------|------------------------|------------------------|
| Economic indicator analysis  | 0.6       | 0.6                    | 0.5                    | 0.5                    |
| Investigation and arrangement of various policies for COVID-19 taken by the government | 0.2       | 0.1                    | 0.1                    | 0.1                    |
| Development partner survey results   | 0.1       | 0.2                    | 0.2                    | 0.3                    |
| Country-specific development cooperation policy  | 0.1       | 0.1                    | 0.2                    | 0.1                    |

Source: Survey Team

### 2) Summary of sensitivity analysis

The results of each sensitivity analysis are as summarized below. Sensitivity analysis did not show much change, which was close to the result of the base case.

**Table 19-10 Summary of Sensitivity Analysis Results (Saint Kitts and Nevis)**

|                                   | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|-----------------------------------|-----------|------------------------|------------------------|------------------------|
| Social and economic policy        |           |                        |                        |                        |
| Health care / nutrition           | 5         | 5                      | 5                      | 5                      |
| education                         | 6         | 6                      | 6                      | 6                      |
| Agriculture / rural development   | 2         | 3                      | 3                      | 3                      |
| Manufacturing industry            | 4         | 2                      | 2                      | 2                      |
| Environment / disaster prevention |           |                        |                        |                        |
| Governance and citizen security   |           |                        |                        |                        |
| DX / Innovation                   |           |                        |                        |                        |
| Infrastructure and Energy         | 3         | 1                      | 1                      | 1                      |
| sightseeing                       | 1         | 4                      | 4                      | 4                      |
| Public-private partnership        |           |                        |                        |                        |

Source: Survey Team

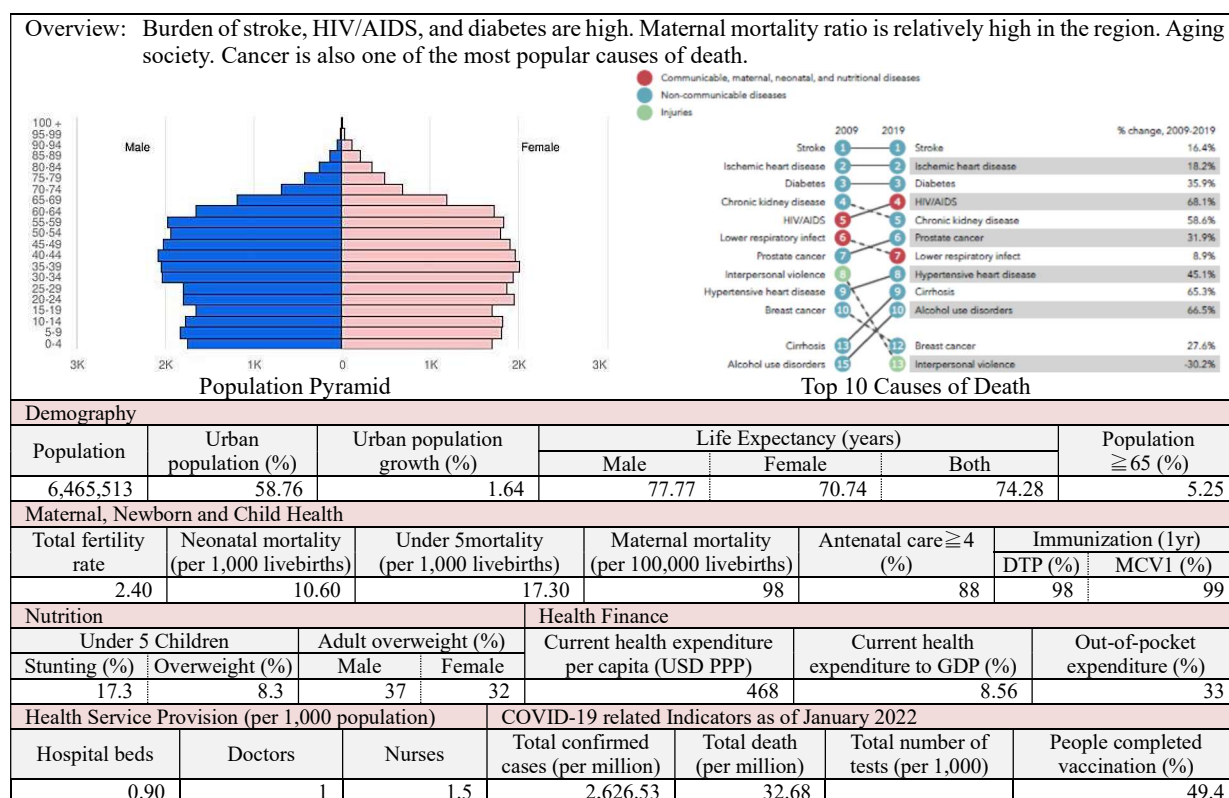
### **(3) Selection of priority sectors by country**

From the above results, 1) social / economic policy, 2) agriculture / rural development, 3) manufacturing industry, 4) environment / disaster prevention, 5) governance / citizen security, 6) DX / innovation, 7) infrastructure / energy, 8) public-private partnership are selected as priority sectors.



## 19.3 Country-specific information by sector

### 19.3.1 Health care / nutrition



Source: Graphs= CIA the World Fact Book, 2021 and Institute for Health Metrics and Evaluation, County Profile; Demography, Total fertility rate, Neonatal mortality, under-5 mortality, Health finance= World Development Indicators, the World Bank (Accessed on Aug 2021); Maternal mortality= UNICEF (Sep 2019); Antenatal care, Immunization, Nutrition, Health service provision,= OECD/The World Bank (2020), Health at a Glance: Latin America and the Caribbean 2020; COVID-19 related indicators= Our World in Data (Accessed on Jan 2022)

| Health                                  |   |
|---|---|
| Leadership/ Governance                  | Responsible Agency: Ministry of Health<br><a href="https://www.gov.kn/">https://www.gov.kn/</a><br>Centralized (Ministry of Health of each island share the responsibility.)<br>Major Relevant Policies: National Social Protection Strategy, 2012-2017 |
| Service Providing System                | Public sector is the main provider. Access to primary level is quite sufficient, but advanced/specialized treatments are provided by foreign visiting medical mission. Private sector supplements the public sector, but no coordination.               |
| Health Finance                          | Government budget, but high out-of-pocket expenses  |
| Human Resource for Health               | Due to insufficient quantity, health personnel are hired from other countries, especially pharmacists and specialized doctors. Because intake of medical education institution is quite limited, many health personnel are educated abroad.             |
| IT/ Digital Health                      | National Information and Communication Committee leads digitalization including health sector.  |
| Drugs/ Medical Equipment                | Frequent stock-out of drugs in public institutions<br>Medical equipment is procured by each health facility.  |
| Priority                                | Noncommunicable disease prevention and control  |
| Communicable Disease Emergency Response | To enhance core capacity of the International Health Regulation (IHR), the Quarantine Law was revised, and a radiation emergency medical management system has been developed.  |
| Major Development Partners              | PAHO/WHO, PEPFAR, charity organizations, One UN, PEPFAR, Medical mission from Cuba and Venezuela, donation from private organizations for medical equipment and free medical services   |
| Nutrition                               |   |
| Institutional Arrangement               | (No information)  |
| Major Relevant Policies                 | A National Food and Nutrition Policy and Plan of Action for The Federation of St Kitts and Nevis, 1998  |
| Human Resource for Health               | Nutrition related degrees: No<br>Nutrition related subjects in pre-service education: Yes<br>Number of nutrition related professionals: 3.7 per 100,000 population  |

Source: Survey Team with reference to WHO Country Cooperation Strategy for Saint Kitts and Nevis at a glance, May 2018, Institute for Health Metrics and Evaluation, County Profile, WHO, Global atlas of medical devices, 2017, and WHO, Nutrition Landscape Information System (NLIS)

## 19.3.2 Education

| Overview  |  |   |              |                 |                 |                 |      |              |              |              |              |
|---|--|---|--------------|-----------------|-----------------|-----------------|------|--------------|--------------|--------------|--------------|
| Number of children  | <table border="1"> <thead> <tr> <th>Education level</th> <th>Preschool</th> <th>primary</th> <th>Lower secondary</th> <th>Upper secondary</th> </tr> </thead> <tbody> <tr> <td>2016</td> <td>1,275 people</td> <td>5,452 people</td> <td>2,536 people</td> <td>1,639 people</td> </tr> </tbody> </table>   | Education level   | Preschool    | primary         | Lower secondary | Upper secondary | 2016 | 1,275 people | 5,452 people | 2,536 people | 1,639 people |
|   | Education level  | Preschool   | primary      | Lower secondary | Upper secondary |                 |      |              |              |              |              |
| 2016  | 1,275 people   | 5,452 people  | 2,536 people | 1,639 people    |                 |                 |      |              |              |              |              |
| Source: Institute for Statistics (UIS), UNESCO Bureau of Statistics |  |   |              |                 |                 |                 |      |              |              |              |              |
| Government authority  | Ministry of Education  |   |              |                 |                 |                 |      |              |              |              |              |
| Education indicator   | Out-of-school children rate 1.1% (2016), public education budget 2.6% of GDP (2015) Source: UIS  |   |              |                 |                 |                 |      |              |              |              |              |
| Impact of COVID-19  |  |   |              |                 |                 |                 |      |              |              |              |              |
| School closure / reopening  | From March 11, 2020 to February 2, 2021, the number of completely closed days is 55, which is less than in other countries. As of October 2021, face-to-face classes are held.   |   |              |                 |                 |                 |      |              |              |              |              |
| COVID-19 measures   | As a measure against COVID-19, measures are implemented based on the strategy created by the Association of East Caribbean States. Providing electronic devices for teachers and students, psychosocial support, providing meals for disadvantaged students, activities to meet the psychosocial needs of teachers, creating videos explaining the current situation for special needs students, Elimination of digital divide |   |              |                 |                 |                 |      |              |              |              |              |
| Distance education  | Implementation status  | Online learning platform provided. Teachers can interact with students in real time and access a variety of materials such as past questions, interactive programs, and digital toolkits. There is a TV education broadcast, and there is no radio education broadcast. |              |                 |                 |                 |      |              |              |              |              |
|   | Access   | Internet access rate for educational purposes at school: 100% (UNESCO)  |              |                 |                 |                 |      |              |              |              |              |
|   | Teacher training   | Conducted training on distance learning programs through TV and the Internet.   |              |                 |                 |                 |      |              |              |              |              |
| School hygiene  | Infection control measures   | Use the UNICEF-created safety guide when reopening school.  |              |                 |                 |                 |      |              |              |              |              |
|   | Facility maintenance   | Basic water supply facilities and hand-washing facilities are maintained in 84% of schools (2019). Source: World Bank / UNICEF Survey <a href="https://washdata.org/">https://washdata.org/</a>   |              |                 |                 |                 |      |              |              |              |              |
| School lunch / nutrition  | N / A  |   |              |                 |                 |                 |      |              |              |              |              |
| Countermeasures for vulnerable people                               | N / A  |   |              |                 |                 |                 |      |              |              |              |              |
| Support for donors, etc.  | N/A  |   |              |                 |                 |                 |      |              |              |              |              |

Source: Survey Team

## 19.3.3 Agriculture / rural development

|   |  |         |         |         |         |        |
|---|--|---------|---------|---------|---------|--------|
| Urban / rural population ratio                    | 30.8% / 69.2% (FAOSTAT 2018)   |         |         |         |         |        |
| Agricultural land area                            | 6,000 ha (FAOSTAT 2019) 1)   |         |         |         |         |        |
| Agricultural sector employment                    | 8.7% of all employment (male / female ratio: 79.1% / 20.9%) (FAOSTAT 2019) 2)  |         |         |         |         |        |
| Agricultural GDP                                  | 1.3% of total GDP (World Bank 2020)  |         |         |         |         |        |
| Of the agricultural sector Value added amount     | \$ 11,387.74 thousand (World Bank 2020) 3) * Statistics include forestry   |         |         |         |         |        |
| Agricultural sector expenditure ratio             | Ratio of agricultural fiscal expenditure to national budget (%) 4)   |         |         |         |         |        |
|   | 2018   | 2019    | 2020    |         |         |        |
|   | 2.72   | 1.66    | 2.07    |         |         |        |
| Agricultural sector import / export balance       | Trade Balance (USD1,000 FAOSTAT) 5)  |         |         |         |         |        |
|   |  | 2015    | 2016    | 2017    | 2018    | 2019   |
|   | export   | 4,985   | 3,500   | 2,782   | 4,433   | 3,653  |
|   | Import   | 60,406  | 78,845  | 79,044  | 43,376  | 44,918 |
| Balance of payments                               | -55,421  | -75,345 | -76,262 | -38,943 | -41,265 |        |
| Agricultural development Policy / plan / strategy | In Saint Kitts and Nevis (SKN), in 2005 the government closed the sugar industry, which had been losing money for decades <sup>6</sup> , and is now diversifying the agricultural sector and exporting-oriented manufacturing and offshore. We are embarking on programs that inspire other economic sectors, such as banks. Agricultural diversification programs focus on peppers, sweet potatoes, vegetables, dairy |         |         |         |         |        |

|                    |  |
|--------------------|--|
|                    | <p>products, beef, mutton, pork and chicken.</p> <p>The current Agricultural Development Strategy (ADS) 7) is an up-to-date agricultural policy that can be identified with a framework for improving domestic crop and livestock and non-food production and marketing between 2013 and 2016. It provides a guide. The implementation of the strategic plan is led by the Department of Agriculture (DoA) and is being promoted in collaboration with partners and stakeholders. The ADS also includes measures to address major changes in the global environment since 2006, severe climate change and resource depletion. The three main strategic goals are 1) to provide safe, affordable and stable food for food and nutrition safety, and 2) to create an innovative and profitable agribusiness for growth and development. It will create, 3) create a sustainable and resilient agricultural system that can adapt to hazards and changing climates.</p> <p>It also identifies nine priority areas of the agricultural sector, predefines the scope of their development actions, and sets parameters for their progress. Four core programs for priority agricultural development are 1) Operation Food Security (OFS), 2) Agribusiness and Market Development (ABMD), 3) Agriculture and Agricultural System Transformation (FAST), 4) Agricultural Risk Management. And adaptation to climate change, which is a mechanism for designing, managing, monitoring and evaluating.</p> <p>The Caribbean Agricultural Research and Development Institute (CARDI), of which SKN is a member, is an organization that conducts research and development aimed at improving the competitiveness and sustainability of the regional agricultural sector, and is a strategic plan that is a roadmap for five years. 2018-20228) is being created. This strategic program focuses on products identified as economically important to the CARICOM region, while maintaining consistency and coordination with each country's unique strategic plans and policies, regional strategies and policies, global strategies and policies. I'm guessing. CARDI divides the member countries into three groups from the aspect of strategic approach according to the economic structure of each country, and SKN belongs to the third group. This group is an OECS country and the R &amp; D department is very dependent on CARDI. Countries with a strong sense of crisis about food security are focused on the development of high value products and centralized and innovative systems.</p> |
| Impact of COVID-19 | <p>According to data from the Caribbean Media Institute 9), crop and livestock production has declined overall in the Commonwealth compared to 2019, and the 2020 Ministry of Agriculture reports yields of 1,070.03. It was tons, a decrease of 28.15% from 1,501.81 tons in 2019 before the regulation was issued. In addition, supply to the market has been sprinkled with food shortages at supermarkets due to supply chain bottlenecks, shipping delays, and restrictions on the movement of workers due to blockage dates.</p> <p>To improve the situation, the government enforced new regulations in 2021, including measures to secure food supply from farmers, with some of its initiative (\$ 44.4 million) allocated to the sector. rice field. \$ 37 million was paid to agriculture and farmers, 60% of which was used to purchase inputs (fertilizers, seeds, pesticides), fuel subsidies for fishermen and land development for farmers. Farmers were also given saplings such as pumpkins, pumpkins, watermelons and peppers to increase production. These initiatives report an increase in agricultural products in the first half of 2021 compared to the same period in 2020.</p> <p>On the other hand, the fisheries sector was not considered an integral part of the fishermen's classification as small entrepreneurs and was not allowed to trade in a pandemic. Of the average federal consumption of 1,300 tonnes per year, 450 tonnes are domestically supplied and two-thirds depend on imports. The Department of Marine Resources has reaffirmed the importance of this sector through this pandemic and said it needs to consider its own food security crisis measures in an emergency.</p>   |
| Source / reference | <ol style="list-style-type: none"> <li>1) FAOSTAT-Land, Input and Sustainability-Land Use-Area-Agriculture (<a href="https://www.fao.org/faostat/en/#data/RL">https://www.fao.org/faostat/en/#data/RL</a>)</li> <li>2) FAOSTAT- Share of employment in agriculture (% of total employment) &amp; Share of female employment in agriculture (% of employment in agriculture) (<a href="https://www.fao.org/faostat/en/#data/OE">https://www.fao.org/faostat/en/#data/OE</a>)</li> <li>3) Agriculture, forestry, and fishing, value added (constant 2015 US \$) --Latin America &amp; Caribbean (<a href="https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart">https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart</a>)</li> <li>4) FAOSTAT-Government Expenditure-Share of Total Expenditure-Central Government (<a href="https://www.fao.org/faostat/en/#data/IG">https://www.fao.org/faostat/en/#data/IG</a>)</li> <li>5) FAOSTAT-Trade-Crops and livestock products-Import / Export Value-Agricultural Products (<a href="https://www.fao.org/faostat/en/#data/TCL">https://www.fao.org/faostat/en/#data/TCL</a>)</li> <li>6) Country-St, Kitts and Nevis, Caribbean Agribusiness (<a href="https://agricarib.org/country/st.-kitts-nevis">https://agricarib.org/country/st.-kitts-nevis</a>)</li> <li>7) St. Kitts Agricultural Development Strategy (ADS) (2013 – 2016) (<a href="http://faolex.fao.org/docs/pdf/stk141099.pdf">http://faolex.fao.org/docs/pdf/stk141099.pdf</a>)</li> <li>8) CARDI Strategic Plan 2018-2022 (<a href="http://www.cardi.org/wp-content/uploads/downloads/2018/05/CARDI-Strategic-Plan-2018-to-2022-Final.pdf">http://www.cardi.org/wp-content/uploads/downloads/2018/05/CARDI-Strategic-Plan-2018-to-2022-Final.pdf</a>)</li> <li>9) st. kitts and nevis, 2021, Media Institute of the Caribbean (<a href="https://www.mediainstituteofthecaribbean.com/st-kitts-and-nevis">https://www.mediainstituteofthecaribbean.com/st-kitts-and-nevis</a>)</li> </ol>  |

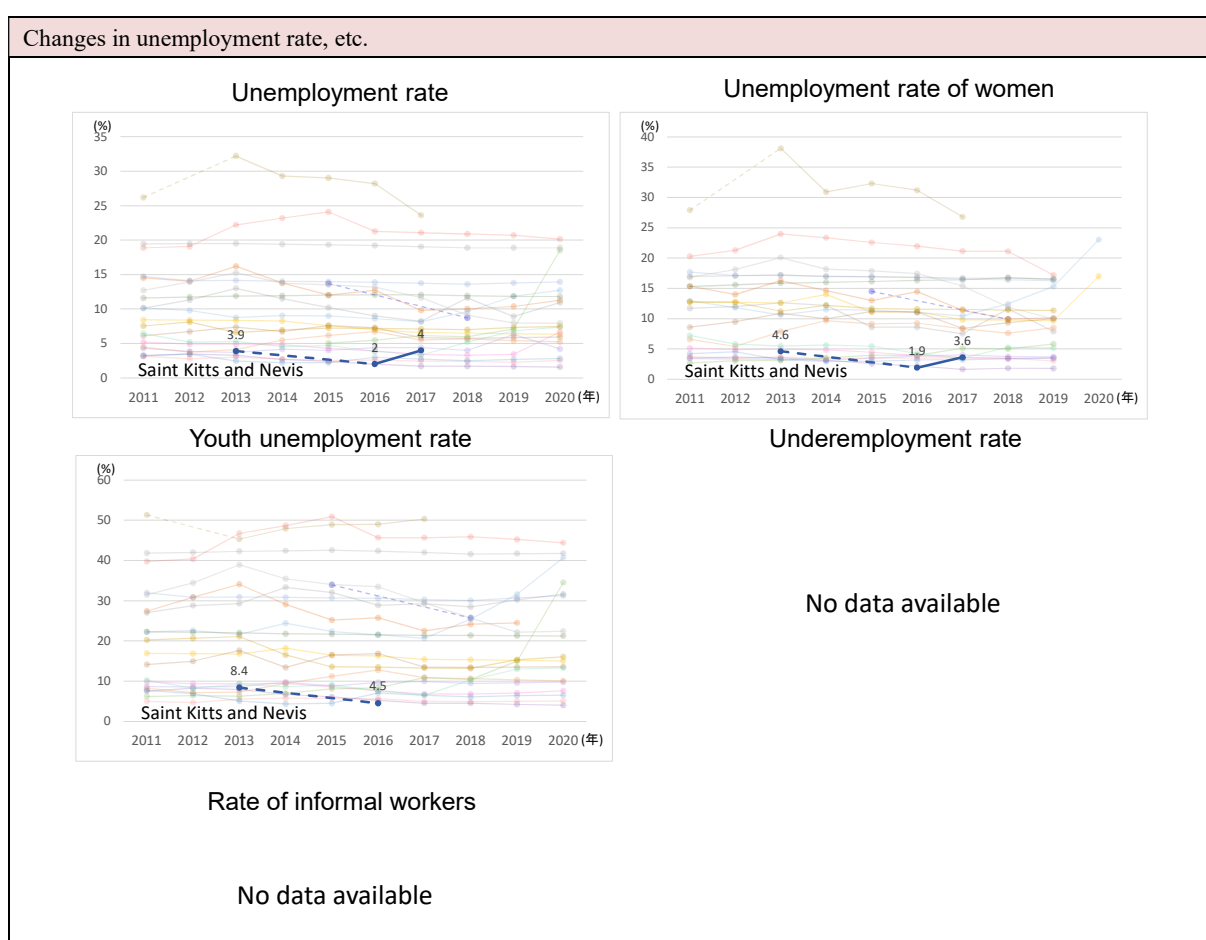
### 19.3.4 Private sector

Saint Kitts and Nevis is a country with low GDP (21st) but high GDP per capita (2nd). The minimum wage is high (2nd), and the unemployment rate is low (5th). Overall, the economic and employment situation is considered to be good.

|              | Index                | Value  | Ranking                | Year | Source     |
|--------------|----------------------|--------|------------------------|------|------------|
| Productivity | GDP per capita (USD) | 17,436 | 2 (Among 22 countries) | 2020 | World Bank |
|              | GDP per worker (USD) | —      | — (Among 18 countries) | —    | —          |

|            |                            |     |                        |      |  |
|------------|----------------------------|-----|------------------------|------|--|
| Employment | Minimum wage (USD / month) | 533 | 2 (Among 23 countries) | 2019 | ILO  |
|            | Unemployment rate          | 4   | 5 (Among 22 countries) | 2017 | Ministry of Finance, Nevis Island Administration |
|            | Female unemployment rate   | 3.6 | 5 (Among 22 countries) | 2017 | Ministry of Finance, Nevis Island Administration |
|            | Youth unemployment rate    | 4.5 | 2 (Among 22 countries) | 2018 | Ministry of Finance, Nevis Island Administration |
|            | Underemployment rate       | —   | — (Among 18 countries) | —    | —  |
|            | Informal worker rate       | —   | — (Among 12 countries) | —    | —  |

Source: Described in the table



Source: World Bank, ILO, The Global Economy, etc.

### 19.3.5 Environment / disaster prevention

|             | item   | data   | remarks    |
|-------------|--|--|------------|
| environment | Environmental agency                                     | Ministerio de Ambiente y Energía               |            |
|             | Waste-related organizations                              | Municipalities                                 |            |
|             | Environmental Budget (USD)                               | 2019:-<br>2020:-<br>2021:-<br>3-year average:- | not gotten |
|             | Environmental budget per capita (2019-2021 average, USD) | -----  | not gotten |

|                     |  |  |                                  |
|---------------------|--|--|----------------------------------|
|                     | Budget ratio to national budget (2019)             | -----  | not gotten                       |
|                     | Donor support status                               | 1  | As of May 2021                   |
|                     | Renewable energy power generation (GWh) (2019)     | 11 11  | IRENA, 2021                      |
|                     | Geothermal power generation capacity (MWe)         | 2020: 0<br>2025 Forecast: 0<br>Potential: 9.00               | WGC, 2020                        |
| Disaster prevention | Disaster prevention organization                   | National Emergency Management Agency (Saint Kitts and Nevis) |                                  |
|                     | Donor support status                               | 0 cases  | As of May 2021                   |
|                     | Number of natural disasters (2010-2020)            | Major disasters: floods, storms                              | (Statistical data not available) |
|                     | Number of victims (persons) per 100,000 population | -----  | (Statistical data not available) |

Source: Survey Team

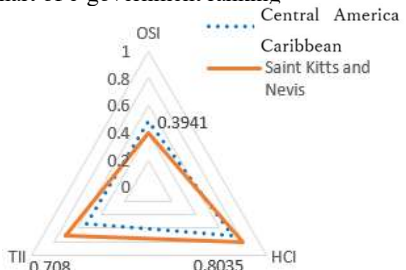
### 19.3.6 Governance and citizen security

| Item                                    | Overview  |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|---|---|-----------------------------|---------|----------------------------|----------------------------|--------------------------|-----------------------------|------|-----|------|-----|------|-----|---------------------|------|-----|------|-----|------|-----|---|-----------------------------|------|-----|------|-----|------|-----|---------------------|------|-----|------|-----|------|-----|--------------------------|-----------------------------|------|-----|------|-----|------|-----|---------------------|------|-----|------|-----|------|-----|--------------------|-----------------------------|------|-----|------|-----|------|-----|---------------------|------|-----|------|-----|------|-----|-------------|-----------------------------|------|-----|------|-----|------|-----|---------------------|------|-----|------|-----|------|-----|-----------------------|-----------------------------|------|-----|------|-----|------|-----|---------------------|------|-----|------|-----|------|-----|
| Political system                        | Parliamentary democracy belonging to the Commonwealth and under the constitutional monarchy   |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
| Election system                         | The monarch is hereditary. The governor is appointed by the monarch. After the legislative elections, the head of a majority party or coalition government is appointed prime minister by the governor.   |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
| Legislative system                      | Unicameral National Assembly  |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
| Most recent / next legislative election | Implemented on June 5, 2020 (next time scheduled for 2025)  |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
| Appointment of judicial system / judge  | The President of the Eastern Caribbean Supreme Court is appointed by the Queen of England. Other judges are appointed by the Judicial and Legal Services Committee, an independent judicial body.   |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
| Political stability                     | Stable  |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
| “Worldwide Governance Indicators”       | All indicators are higher than the Latin American average.  |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   | <table border="1"> <caption>Worldwide Governance Indicators Percentile Rank Data (Approximate)</caption> <thead> <tr> <th>Indicator</th> <th>Country</th> <th>Year</th> <th>Percentile Rank (0 to 100)</th> </tr> </thead> <tbody> <tr> <td rowspan="6">Voice and Accountability</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~60</td> </tr> <tr> <td>2019</td> <td>~60</td> </tr> <tr> <td>2020</td> <td>~60</td> </tr> <tr> <td rowspan="3">St. Kitts and Nevis</td> <td>2010</td> <td>~85</td> </tr> <tr> <td>2019</td> <td>~85</td> </tr> <tr> <td>2020</td> <td>~85</td> </tr> <tr> <td rowspan="6">Political Stability and Absence of Violence/Terrorism</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">St. Kitts and Nevis</td> <td>2010</td> <td>~85</td> </tr> <tr> <td>2019</td> <td>~85</td> </tr> <tr> <td>2020</td> <td>~85</td> </tr> <tr> <td rowspan="6">Government Effectiveness</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">St. Kitts and Nevis</td> <td>2010</td> <td>~85</td> </tr> <tr> <td>2019</td> <td>~85</td> </tr> <tr> <td>2020</td> <td>~85</td> </tr> <tr> <td rowspan="6">Regulatory Quality</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">St. Kitts and Nevis</td> <td>2010</td> <td>~85</td> </tr> <tr> <td>2019</td> <td>~85</td> </tr> <tr> <td>2020</td> <td>~85</td> </tr> <tr> <td rowspan="6">Rule of Law</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">St. Kitts and Nevis</td> <td>2010</td> <td>~85</td> </tr> <tr> <td>2019</td> <td>~85</td> </tr> <tr> <td>2020</td> <td>~85</td> </tr> <tr> <td rowspan="6">Control of Corruption</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">St. Kitts and Nevis</td> <td>2010</td> <td>~85</td> </tr> <tr> <td>2019</td> <td>~85</td> </tr> <tr> <td>2020</td> <td>~85</td> </tr> </tbody> </table> | Indicator                   | Country | Year                       | Percentile Rank (0 to 100) | Voice and Accountability | * Latin America & Caribbean | 2010 | ~60 | 2019 | ~60 | 2020 | ~60 | St. Kitts and Nevis | 2010 | ~85 | 2019 | ~85 | 2020 | ~85 | Political Stability and Absence of Violence/Terrorism | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | St. Kitts and Nevis | 2010 | ~85 | 2019 | ~85 | 2020 | ~85 | Government Effectiveness | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | St. Kitts and Nevis | 2010 | ~85 | 2019 | ~85 | 2020 | ~85 | Regulatory Quality | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | St. Kitts and Nevis | 2010 | ~85 | 2019 | ~85 | 2020 | ~85 | Rule of Law | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | St. Kitts and Nevis | 2010 | ~85 | 2019 | ~85 | 2020 | ~85 | Control of Corruption | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | St. Kitts and Nevis | 2010 | ~85 | 2019 | ~85 | 2020 | ~85 |
|   | Indicator   | Country                     | Year    | Percentile Rank (0 to 100) |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   | Voice and Accountability  | * Latin America & Caribbean | 2010    | ~60                        |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   |                             | 2019    | ~60                        |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   |                             | 2020    | ~60                        |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | St. Kitts and Nevis         | 2010    | ~85                        |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   |                             | 2019    | ~85                        |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   |                             | 2020    | ~85                        |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   | Political Stability and Absence of Violence/Terrorism   | * Latin America & Caribbean | 2010    | ~55                        |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
| 2019                                    |   |                             | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
| 2020                                    |   |                             | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
| St. Kitts and Nevis                     |   | 2010                        | ~85     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2019                        | ~85     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2020                        | ~85     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
| Government Effectiveness                | * Latin America & Caribbean   | 2010                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2019                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2020                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   | St. Kitts and Nevis   | 2010                        | ~85     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2019                        | ~85     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2020                        | ~85     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
| Regulatory Quality                      | * Latin America & Caribbean   | 2010                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2019                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2020                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   | St. Kitts and Nevis   | 2010                        | ~85     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2019                        | ~85     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2020                        | ~85     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
| Rule of Law                             | * Latin America & Caribbean   | 2010                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2019                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2020                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   | St. Kitts and Nevis   | 2010                        | ~85     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2019                        | ~85     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2020                        | ~85     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
| Control of Corruption                   | * Latin America & Caribbean   | 2010                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2019                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2020                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   | St. Kitts and Nevis   | 2010                        | ~85     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2019                        | ~85     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2020                        | ~85     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
| Global freedom status                   | N / A   |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
| Corruption Perception Index (CPI)       | N / A   |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
| E-government                            | Equivalent to the Latin American average and higher than the Caribbean average.   |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |

|                   |  |
|-------------------|--|
| development index |  |
| Rule of law       | According to WGI, the level of "rule of law" is better than the regional average.  |
| Citizen security  | The homicide rate is high. The homicide rate in 2012 was 36.1 / 100,000 (the same year, the Caribbean average was 16.3, and the world average was 6.2) (UNODC 2021). |

Source: Survey Team

### 19.3.7 DX / Innovation

|   |  |   |
|---|--|---|
| Basic indicators and statistics   | E-Government Ranking 1): 95th                                    | Radar chart of e-government ranking<br> |
|   | Mobile connection index 2):-                                     |   |
|   | Network Infrastructure Index:-                                   |   |
|   | Internet user rate 80.7  |   |
|   | Mobile connection rate 144.0                                     |   |
|   | Fixed broadband rate 55.8  |   |
|   | Rate of increase in the number of Internet users 0.7 (2021/2020) |   |
| <b>Communication network</b>  |  |   |
| <p>The fixed broadband penetration rate of Saint Kitts and Nevis (SKN) 3) is 55.8% (2018), which is significantly higher than the penetration rate of Latin America and the Caribbean region 3) 13.1% (2018). Unlike other Caribbean islands, there were multiple service providers in the market prior to the full liberalization of the telecommunications market in 2001, allowing a smooth and healthy transition to a competitive market environment. It seems that things are big. The state-owned St Kitts-Nevis Cable Communications Ltd provides Internet and landline services, with Digicel and Flow (formerly known as Lime: C &amp; W) as major private communications providers. Flow is a major Caribbean company that provides landline, internet and mobile phone services, and launched 4G / LTE mobile services in 2017 4). Meanwhile, Digicel announced its entry into the mobile market in 2005 and introduced 4G mobile technology for the first time in the Caribbean in 2013 5). In the mobile sector, UTS Cariglobe and 21st Century Telecom also offer services. Broadband service provider The Cable announced that it was upgrading its network in 2019, increasing Internet speeds for homes and businesses across the island by up to 50% 6) (download 160Mbps / upload 35Mbps).</p> <p>The East Caribbean Telecommunications Bureau (ECTEL) 7) is promoting market liberalization and competition in the region, and its activities are complemented by the National Telecommunications Regulatory Commission (NTRC) 8).</p>   |  |   |
| <b>National Strategy for Digital Transformation</b>   |  |   |
| <p>The National Information and Communication Technology Strategic Plan 2007-2019) sets out SKN's ICT development and DX strategies, with accessibility, transparency, effectiveness, efficiency and mutuality as prerequisites for implementing national ICT solutions. It is clearly stated that an e-government will be built with a system that is operable, confidential, complete, and available, verifiable, and fair.</p> <p>The government is focusing on promoting DX Strategy 2020-2022 while the progress of implementation projects in the digital economy is being affected under the COVID-19 situation 10). As the first step, it announced that it has begun to strengthen its broadband infrastructure and introduce cyber security programs 10). With the support of The Cable, the government's wide-area network is being deployed with the fiber lines needed to connect all ministries and Wi-Fi in all community centers. Scheduled 11).</p> <p>The government also strongly encourages foreign direct investment in industries that stimulate citizens' economic activities, such as job creation and foreign currency acquisition. Each island has individual investment promotion agencies, the St. Christopher Investment Promotion Agency (SKIPPA) and the Nevis Investment Promotion Agency (NIPA), both of which have several investment incentives, such as facilitation services for companies considering location. We are providing 12). Sectors covered by this incentive include financial services, tourism, real estate, agriculture, information and communication technology, international education services, renewable energy, ship registration and limited light industry, but are covered by ICT FDI ( An action plan has been developed for the allocation of development space and the placement of ready-to-use commercial infrastructure for (foreign direct investment in IT technology).</p> |  |   |
| <b>Characteristic efforts</b>   |  |   |
| <p>The Eastern Caribbean Central Bank (ECCB) started a digital currency pilot project in March 2021 13). With the introduction of DCash, a digital version of the EC dollar, SKN was one of the first Eastern Caribbean countries to introduce this pilot currency. Regarded as fiat currency, DCash is available as a safe, cheap and real-time payment option in the East Caribbean region.</p> <p>DCash is issued by the ECCB and distributed to banks and non-bank financial institutions licensed by the Organization of Eastern Caribbean States (ECCU). As for the payment method, the transaction is completed by reading and exchanging the QR code via the smart device that downloaded the application as a wallet.</p>  |  |   |
| <b>source</b>   |  |   |
| <p>156. E-Gov-Index: a composite indicator that consists of three indexes (Online Service Index, Telecommunication Infrastructure Index and Human Capital Index), which are equally weighted. It ranges from 0 to 1, with 1 being the most developed.</p> <p>157. Mobile Connectivity Index: an input index developed by GSMA to measure the performance against the four key enablers of mobile internet adoption – infrastructure, affordability, consumer readiness and content. (<a href="https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2016/06/Mobile-Connectivity-Launch-Report.pdf">https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2016/06/Mobile-Connectivity-Launch-Report.pdf</a>)</p> <p>158. Fixed broadband subscriptions (per 100 people) --St. Kitts and Nevis, Latin America &amp; Caribbean <a href="https://data.worldbank.org/indicator/IT.NET.BBND.P2?locations=KN-ZJ">https://data.worldbank.org/indicator/IT.NET.BBND.P2?locations=KN-ZJ</a></p> <p>159. Flow (Saint Kitts &amp; Nevis) launches LTE <a href="https://www.commsupdate.com/articles/2017/10/02/flow-saint-kitts-nevis-launches-lte/">https://www.commsupdate.com/articles/2017/10/02/flow-saint-kitts-nevis-launches-lte/</a></p>   |  |   |



|      |  |
|------|--|
| 160. | Digicel launches '4G' in SKN<br><a href="https://www.commsupdate.com/articles/2013/04/26/digicel-launches-4g-in-skn/">https://www.commsupdate.com/articles/2013/04/26/digicel-launches-4g-in-skn/</a>  |
| 161. | The Cable increases internet speeds across Saint Kitts and Nevis<br><a href="https://www.commsupdate.com/articles/2019/01/14/the-cable-increases-internet-speeds-across-saint-kitts-and-nevis/">https://www.commsupdate.com/articles/2019/01/14/the-cable-increases-internet-speeds-across-saint-kitts-and-nevis/</a>  |
| 162. | <a href="https://www.ectel.int/about-ectel/">https://www.ectel.int/about-ectel/</a>  |
| 163. | The National Telecommunications Regulatory Commission (St. Kitts and Nevis) <a href="https://www.ntrc.kn/home-generic-v1-2/">https://www.ntrc.kn/home-generic-v1-2/</a>  |
| 164. | National Information and Communications Technology (ICT) Strategic Plan: <a href="https://unstats.un.org/unsd/dnss/docViewer.aspx?docID=2297">https://unstats.un.org/unsd/dnss/docViewer.aspx?docID=2297</a>   |
| 165. | COVID-19 slowed progress, but Federation on track to create a digital economy<br><a href="https://www.thestkittsnevisobserver.com/COVID-19-slowed-progress-but-federation-on-track-to-create-a-digital-economy/">https://www.thestkittsnevisobserver.com/COVID-19-slowed-progress-but-federation-on-track-to-create-a-digital-economy/</a>                             |
| 166. | Federation's digital transformation efforts to provide upgraded services, better Access<br><a href="https://www.thestkittsnevisobserver.com/federations-digital-transformation-efforts-to-provide-upgraded-services-better-access/">https://www.thestkittsnevisobserver.com/federations-digital-transformation-efforts-to-provide-upgraded-services-better-access/</a> |
| 167. | 2021 Investment Climate Statements: Saint Kitts and Nevis<br><a href="https://www.state.gov/reports/2021-investment-climate-statements/saint-kitts-and-nevis/">https://www.state.gov/reports/2021-investment-climate-statements/saint-kitts-and-nevis/</a>   |
| 168. | <a href="https://www.dcashec.com/about">https://www.dcashec.com/about</a>  |

### 19.3.8 Infrastructure and Energy

|   |   |
|---|---|
| Transport                                 |   |
| Overview                                  | Inland transportation is mainly by car. There is a domestic air route between Saint Kitts and Nevis. There is a railway for sightseeing (29km).                             |
| Leadership governance                     | Ministry of Public Works, Utilities, Transport and Postal Services  |
| Major development partners                | No information  |
| Energy and electricity                    |   |
| Overview                                  | 99% of primary energy is imported petroleum and petroleum products (2019).<br>96% of electricity is generated from oil and the rest from renewable energy (wind and solar). |
| Carbon neutral national plan              | No information<br>Target: Reduce CO <sub>2</sub> emissions by 61% by 2030 (NDC, 2021)   |
| Leadership governance and utility company | Ministry of Public Works, Utilities, Transport and Postal Services<br>St. Kitts Electricity Company Ltd. (SKELEC) / Nevis Electricity Company Ltd. (NEVLEC)                 |
| Major development partners                | JICA / GIZ  |

Source: JICA Study Team with reference to various websites of the government organization and international organization (WB / IEA / IRENA / US DOE).

### 19.3.9 Tourism

Of the 23 countries surveyed, Saint Kitts and Nevis has the largest impact of COVID-19 on the proportion of tourism in GDP.

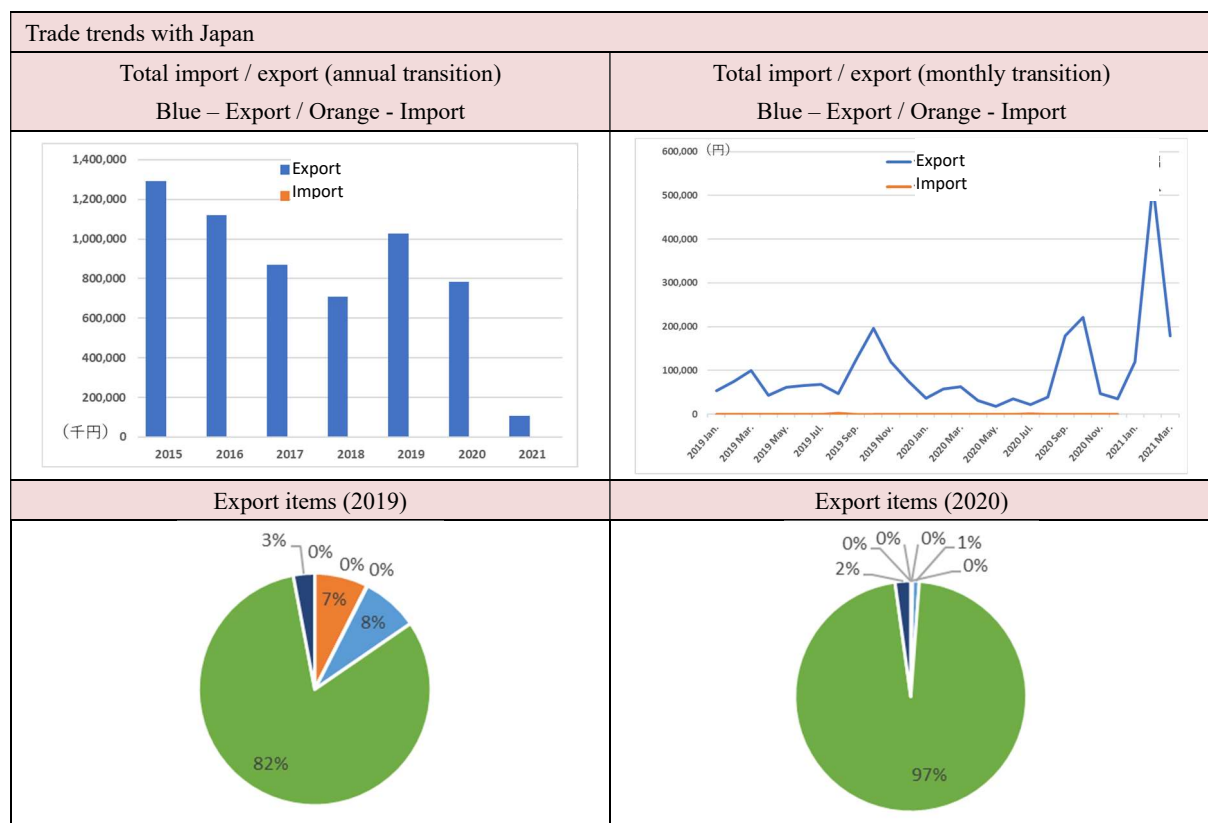
|  |  |  |
|--|--|--|
| Number of international tourist arrivals (2019)              |  | 120 thousand   |
| International Tourism Receipts (2019)                        |  | USD 189 million  |
| Tourism Competitiveness Ranking (2019)                       |  | N / A  |
| Tourism Dependency Index (2019)                              |  | 35.9 (18th out of 166 countries)   |
| Govern-ment of Japan policy                                  | Number of JICA projects in the last 10 years   | none   |
|  | References to the Country Assistance Policy  | none   |
|  | Interest in pilot projects   | N / A  |
| Tourism industry vulnerability                               | Contribution of Travel & Tourism to GDP (2019)   | 28.2% (10th out of 23 countries)   |
|  | Contribution of Travel & Tourism to employment (2019)  | 59.1% (3rd out of 23 countries)  |
|  | Ratio of international spending (2019)   | 95% (2nd out of 23 countries)  |
|  | Top 2 countries of origin of visitors (2019)   | USA (61.06%)<br>Canada (5.41%)   |
| Importance of tourism  | Ratio of the budget amount of tourism-related ministries to the national budget amount (2019)            | 4.0% (2nd out of 16 countries)<br>National budget: XCD 772,881,833<br>Budget of tourism-related ministries: XCD 30,668,000 |
|  | Whether or not it is mentioned as a priority sector in the National Economic and Social Development Plan | N / A  |
|  | Existence of effective national tourism policies / strategies / plans                                    | none   |
| Impact of COVID-19   | Changes in the contribution of Travel & Tourism to GDP (2019 → 2020)                                     | -72.3% (1st out of 23 countries)   |
|  | Changes in the contribution of Travel & Tourism to employment (2019 → 2020)                              | -29.5% (6th out of 23 countries)   |
| Number of government support measures for the tourism sector |  | N / A  |

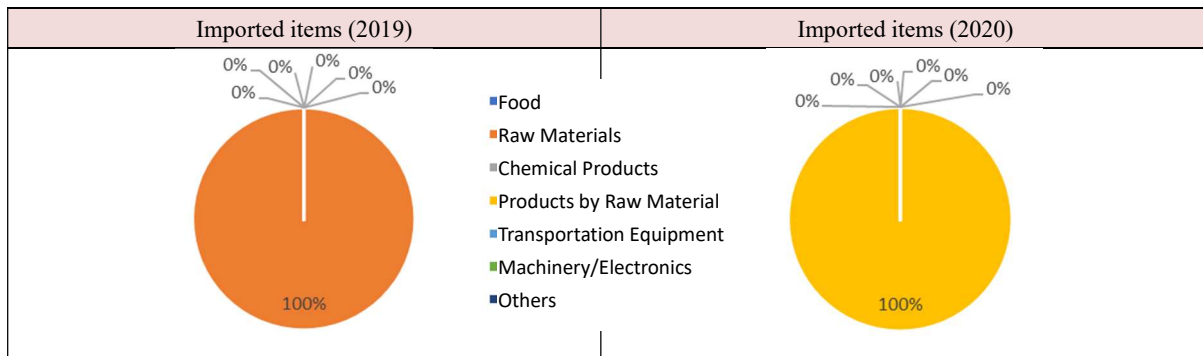
Source: Survey Team



### 19.3.10 Public-private partnership

|  | item   | Contents    |
|--|--|-------------|
| No. of JICA Public-Private Partnership Projects (After 2012)                 | Cooperation preparatory survey (overseas investment and financing) (former PPP infrastructure project)           | 0 cases     |
|  | Overseas investment and loan   | 0 cases     |
|  | SME Partnership Promotion Survey (support for Small-sized Enterprise)  | 0 cases     |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for small- and medium- sized enterprise) | 0 cases     |
|  | SDGs Business Verification Survey with Private Sector (support for small- and medium- sized enterprise)          | 0 cases     |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for large enterprise)                    | 0 cases     |
|  | SDGs Business Verification Survey with Private Sector (support for large enterprise)                             | 0 cases     |
| Total number of Japanese private companies entering the market (2019 survey) | Total number of business locations   | 0 companies |
|  | Overseas branches of Japanese companies,   | 0 companies |
|  | Local corporations wholly owned by Japanese companies and their branches   | 0 companies |
|  | Branch offices wholly owned by Japanese companies and their branches   | 0 companies |
|  | joint ventures (local corporations in which Japanese companies have a direct or indirect stake of 10% or more)   | 0 companies |
|  | joint ventures (Branch offices in which Japanese companies have a direct or indirect stake of 10% or more)       | 0 companies |
|  | companies established overseas by Japanese nationals (in which Japanese nationals have a stake of 10% or more)   | 0 companies |
| Unknown classification   | 0 companies  |             |
| Number of Japanese residents (2020 survey)                                   | Total  | 0 people    |
|  | Long-term residents  | 0 people    |
|  | Permanent resident   | 0 people    |
| Business Environment   | Doing Business 2020 Rank   | 139th       |
| PPP Project  | Existence of PPP law scheme  | ×           |
|  | PPP project with Japanese companies  | 0 cases     |





**Gathering information about the PPP system**

| Nº  | Task Item   | Inquiries/comments/status<br>Title of submitted file   | Source/URL  |
|-----|---|--|---|
| 1   | <b>PRIORITY 4_PPP Sector</b>  |  |   |
| 1.1 | PPP Projects in selective countries<br>PPP rules and regulations in Central America and Caribbean Countries |  | All below can be useful   |
| A   | PPP laws and Regulations<br>if there is any, when, and how  | There is no PPP Law  |   |
| B   | PPP Unit Organization<br>if there is any, how structured  | There is no PPP Unit Organization  |   |
| C   | PPP sectors<br>in what sectors are the PPPs allowed   | There is only information about the Energy Sector  | <a href="https://www.pnewswire.com/news-releases/government-of-st-kitts-and-nevis-skelec-and-leclanche-commence-construction-of-caribbeans-largest-solar-generation-and-storage-system-301190418.html">https://www.pnewswire.com/news-releases/government-of-st-kitts-and-nevis-skelec-and-leclanche-commence-construction-of-caribbeans-largest-solar-generation-and-storage-system-301190418.html</a> |
| D   | Proposal Types (Solicited or Unsolicited)<br>unsolicited  | There is no information to confirm that it was Solicited. But it is being built in an area owned by the government, so it could mean that it was Solicited | <a href="https://www.pnewswire.com/news-releases/government-of-st-kitts-and-nevis-skelec-and-leclanche-commence-construction-of-caribbeans-largest-solar-generation-and-storage-system-301190418.html">https://www.pnewswire.com/news-releases/government-of-st-kitts-and-nevis-skelec-and-leclanche-commence-construction-of-caribbeans-largest-solar-generation-and-storage-system-301190418.html</a> |
| E   | PPP Forms<br>BOT,BTO,DB,,,what form are allowed   | The project is a BOO form  | <a href="https://www.pnewswire.com/news-releases/government-of-st-kitts-and-nevis-skelec-and-leclanche-commence-construction-of-caribbeans-largest-solar-generation-and-storage-system-301190418.html">https://www.pnewswire.com/news-releases/government-of-st-kitts-and-nevis-skelec-and-leclanche-commence-construction-of-caribbeans-largest-solar-generation-and-storage-system-301190418.html</a> |
| F   | PPP types<br>Availability payment, service purchase   | -  |   |
| G   | PPP Project Trends<br>how much PPP projects in the last 10 years  | 1<br>St. Kitts Solar PV and Storage Plant (2020)   | <a href="https://www.pnewswire.com/news-releases/government-of-st-kitts-and-nevis-skelec-and-leclanche-commence-construction-of-caribbeans-largest-solar-generation-and-storage-system-301190418.html">https://www.pnewswire.com/news-releases/government-of-st-kitts-and-nevis-skelec-and-leclanche-commence-construction-of-caribbeans-largest-solar-generation-and-storage-system-301190418.html</a> |
| H   | Participation of Japanese firms in PPP Projects<br>if any (check news source)                               | -  |   |
|     | Any notable points for each country<br>if any   |  |   |

Source: Survey Team

## 20. Saint Lucia

### 20.1 Country overview (basic information)

#### 20.1.1 Basic information

Saint Lucia is a parliamentary monarchy of the Commonwealth of Nations located in the central part of the Windward Islands in the West Indies, and is a member of the Commonwealth of Nations. It is an island country with French Martinique to the north, Saint Vincent and the Grenadines to the south, and Barbados to the southeast across the sea. The capital is Castries. The name of Saint Lucia comes from the folklore that the day Christopher Columbus "discovered" the island was a holiday of St. Lucia. Saint Lucia established diplomatic relations with the People's Republic of China in 1997 and broke with the Republic of China (Taiwan), but in 2007 it restored diplomatic relations with the Republic of China and broke with the People's Republic of China. Agriculture is centered on bananas, and there are also cocoa and copra. The tourism industry is also promising. No railroads have been laid on the island, and roads have been improved only on the west coast centered on the capital and on the southeast coast centered on Hewanorra International Airport. Walking or mule is still the main means of transportation in the inland mountainous areas.

#### 20.1.2 General circumstances

|             |   |                 |   |
|-------------|---|-----------------|---|
| 1 area      | 620 square kilometers (almost the same as Awaji Island) | 2 Population    | 181, 000 (2018 World Bank)  |
| 3 Capital   | Castries  | 4 ethnic groups | African descent (85.3%), mixed race (10.9%), East Indian descent (2.2%), etc. |
| 5 languages | English (official language), Saint Lucian Creole        | 6 religion      | Christianity (Catholic, Protestant, Anglican, etc.), etc.                     |

Source: Ministry of Foreign Affairs HP Saint Lucia Basic Data

#### 20.1.3 Economic overview

|                          |  |                              |   |
|--------------------------|--|------------------------------|---|
| 1 Major industry         | Tourism, agriculture (banana, coconut, etc.)   | 2 GNI<br>3 GNI / person      | US \$ 1,739 million (World Bank 2018)<br>US \$ 15,150 (2019, WDI) |
| 4 Economic growth rate   | 0.85% (2018 World Bank)  | 5 Unemployment rate          | 20.7% (2019) (ILO)  |
| 6 Price increase rate    | 1.99% (2018 IMF)   |                              |   |
| 7 Total trade amount     | Exports: US \$ 96 million (2018 WTO)<br>Import: US \$ 688 million (2018 WTO)   |                              |   |
| 8 Major trade items      | Export: Transportation equipment, ornaments, alcoholic beverages<br>Imports: fuel, food, machinery, transportation equipment, chemical products  |                              |   |
| 9 Major trading partners | Exports: US, EU, Trinidad Tobago, Japan<br>Imports: USA, Trinidad and Tobago, EU, Barbados (2017, WTO)   |                              |   |
| 10 currencies            | Eastern Caribbean Dollar (EC \$)   | 11 Foreign currency reserves | na  |
| 12 National budget       | USD588,887,930 (2019)  | 13 External debt balance     | na  |
| 14 Economic overview     | <p>The economy of Saint Lucia has traditionally relied on banana-based agriculture, but banana production has been due to the EU's abolition of tariffs on Caribbean bananas, price fluctuations in international markets, and natural disasters such as hurricanes. And as a result of the sharp drop in exports, tourism has become the main industry in recent years, as in many Caribbean countries.</p> <p>The economy has been sluggish since the financial crisis of 2008, but has achieved positive growth in recent years due to the growth of the tourism industry from around 2016.</p> <p>Since the tourism industry is the cornerstone of income, employment, and foreign currency acquisition, the number of tourists from Europe and the United States will increase and decrease, the international price of fossil fuels will fluctuate because it depends mostly on imports, and natural disasters such as hurricanes will occur. The economic structure is easily affected by external factors, and the challenge is to achieve economic diversification that brings long-term stability in addition to reducing public debt.</p> |                              |   |

Source: Ministry of Foreign Affairs HP Saint Lucia Basic Data

## 20.1.4 Country-specific development cooperation policy

### (1) Government of Japan Development Cooperation Policy by Country

**Table 20-1 Overview of Japan's ODA to Saint Lucia**

|   |  |
|---|--|
| <b>1. 1. Overview</b>   |  |
| Japan's economic cooperation with Centrusia began with the acceptance of trainees in 1983, the Grant-in-Aid for Fisheries in 1987, the dispatch of experts in 1991, and the Grant-in-Aid for Grassroots Human Security in 1999. .. In 1994, the Japan Overseas Cooperation Volunteers (JOCV) dispatch arrangement was signed, and JOCV and senior overseas volunteers are dispatched. Japan is currently implementing technical cooperation and grant-in-aid for aid in the fields of disaster prevention / environment and fisheries as one of the major donor countries.  |  |
| <b>2. 2. Aim of development cooperation</b>   |  |
| There are many island nations in the Caribbean region where the members of the Caribbean Community (Calicom) including Saint Lucia are located, and natural disasters such as hurricanes, earthquakes, and tsunamis occur frequently, and the sustainable use of marine biological resources is promoted. It has something in common with Japan in terms of promotion. In addition to being vulnerable to climate change and natural disasters, Calicom member countries are based on industries that have a small population and economy and are susceptible to external factors such as agriculture, fisheries, and tourism. All 14 countries are included in the list of small island developing states published by the United Nations Secretariat. In order to overcome the vulnerabilities peculiar to small island developing states in the Calicom countries, it is necessary to cooperate by utilizing Japan's technology and knowledge in addition to deepening bilateral relations and socio-economics of each country. It is important from the viewpoint of financial stability and sustainable growth of the entire region.         |  |
| <b>3. 3. Basic policy</b>   |  |
| In the Development Cooperation Charter, even if the per capita income is at a certain level, for countries with special vulnerabilities such as small island developing states, necessary cooperation will be provided according to the actual development needs and burden capacity of each country. For the Caribbean Community (Calicom) member countries, the first is based on the Japan-Calicom Joint Ministerial Statement adopted at the 4th Japan-Calicom Foreign Ministers' Meeting held in November 2014. In order to "cooperate for sustainable development including overcoming vulnerabilities peculiar to small island developing states", we will develop cooperation that makes use of Japan's technology and knowledge. In accordance with these policies, Saint Lucia will be supported to overcome the vulnerabilities peculiar to small island developing states by supporting environmentally friendly sustainable social development and disaster prevention efforts. We also reaffirmed that we will cooperate in accordance with this policy at the 5th Japan-Calicom Foreign Ministers' Meeting held in September 2016. |  |
| <b>4. Priority areas</b>  |  |
| (1) Disaster prevention / environment: While strengthening the ability to respond to frequent hurricanes and natural disasters such as floods, small island developing states in the fields of climate change countermeasures, conversion to renewable energy, promotion of energy conservation, waste management, etc. Provide the support necessary to overcome the vulnerabilities peculiar to developing countries. Also pay attention to sharing knowledge with other Calicom member countries.  |  |
| (2) Fisheries: In line with Japan's shared goal of sustainable use of marine biological resources, we will continue to cooperate for the sustainable development and management of the fishery industry for industrial diversification.   |  |

Source: Ministry of Foreign Affairs HP Saint Lucia Country Data Collection 2017

**Table 20-2 National Development Cooperation Policy for Saint Lucia (September 2016)**

|   |  |
|---|--|
| <b>3. 3. Priority field (medium goal)</b> |  |
| (1) Disaster prevention / environment     | We are frequently hit by natural disasters such as hurricanes and floods, and we will provide support in the fields of disaster prevention and climate change countermeasures, which are urgent issues. Cooperate to promote the introduction of renewable energy and energy conservation.                 |
| (2) Fisheries                             | The fishery contributes to the supply of high-quality animal protein to the people and plays an important role from the viewpoint of securing employment opportunities for local residents, and cooperates for the sustainable development and management of the fishery. Will continue to be implemented. |
| (3) Others                                | Waste management is particularly important for small island nations whose main industry is the tourism industry, and promotes the 3Rs (reduction of waste generation, reuse of resources and products, and recycling). And the issue is how to properly manage the disposal site.                          |

Source: Survey Team

### 1) Survey on COVID-19 by development partners

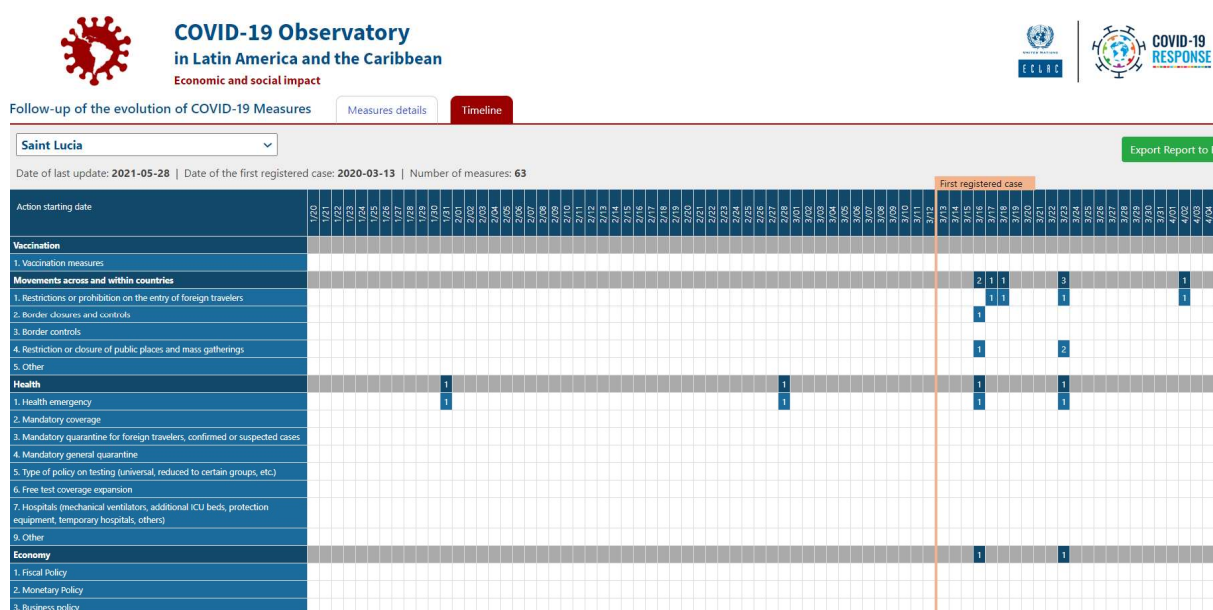
We extracted sector names and specific quantitative figures that have a large impact on the country-specific analysis described in various reports of development partners. Reports from the World Bank, OECD, BCIE, SICA, and the Ministry of Economy, Trade and Industry of Japan suggest the importance of introducing digitalization and innovation (Fintech, Aggrotech, Autotech, etc.), and incorporate the survey results of these development partners. I arranged it accordingly.

World Bank: "Growth and Revitalization" 2021 Semi-Annual Economic Report (March 2021)

- ✓ OECD: COVID-19 in LAC, Regional socio-economic implications and policy priorities (December 2020)
- ✓ BCIE: Impacto Económico del COVID-19 (April 2020)
- ✓ SICA: Estimación del Impacto Económico del COVID-19 en Centroamérica y República Dominicana (April 2020)
- ✓ Ministry of Economy, Trade and Industry of Japan: "Economic and Industrial Policy Based on the Impact of the New Corona Virus" (June 2020), Accelerating Digitization and Onlineization, Gig Economy, Innovation in the Transition to a New Everyday Life 1) Medical care / health, 2) Digital: Infrastructure development premised on the arrival of a digital society, 3) Green: Response to climate change problems, Energy security, 4) Emphasizes resilience.

### 20.1.5 Policies for COVID-19 measures taken by governments of each country

Various policies for COVID-19 taken by the government are described on the ECLAC homepage "COVID-19 Observatory" by country, time series, and field, and can be analyzed.



Source: <https://cepalstat-prod.cepal.org/forms/covid-countrysheet/index.html?table=2&country=DMA>

In this survey, the 15 policies implemented in Saint Lucia listed on this website were classified by sector as much as possible.

#### 1) Infection spread and alleviation of aggravation and death

No material was available.

#### 2) Support for affected industries and people

**Table 20-3 Support for Affected Industries and People (Saint Lucia)**

| Various government policies (COVID-19 Observatory for LAC) |    |  |  |
|--|----|--|--|
| Socioeconomic policy                                       | 4  |  |  |
| Health care & nutrition                                    | 5  |  |  |
| Education  | 1  |  |  |
| Agriculture & rural development                            | 0  |  |  |
| Private sector   | 2  |  |  |
| Environment & disaster prevention                          | 0  |  |  |
| Governance and social security                             | 3  |  |  |
| DX and innovation  | 0  |  |  |
| Infrastructure & energy                                    | 0  |  |  |
| Tourism  | 0  |  |  |
| PPP  | 0  |  |  |
| Others (b)   | 0  |  |  |
| total  | 15 |  |  |

Source: Survey Team

### 3) Arrangement of various policies for COVID-19 taken by the government

COVID-19 Observatory for Latin America and Caribbean (ECLAC) organized by governments

**Table 20-4 Government-directed COVID-19 Policy Categories (Saint Lucia)**

#### Follow-up of the evolution of COVID-19 Measures

| Vaccination   | Economy  | Social protection   |
|---|--|---|
| 1. Vaccination measures   | 1. Fiscal Policy   | 1. Cash transfers (new transfers, increase in existing transfers, expansion of cash transfers to new recipients, early disbursement of transfers) |
| <b>Movements across and within countries</b>  | 2. Monetary Policy   | 2. Food transfers / In-kind transfers   |
| 1. Restrictions or prohibition on the entry of foreign travelers  | 3. Business policy   | 3. Guarantee of basic services  |
| 2. Border closures and controls   | 4. Restriction of economic activity (including shops and shopping centers)                             | <b>Education / schools</b>  |
| 3. Border controls  | 5. Price and quantity controls   | 1. Suspension of classes  |
| 4. Restriction or closure of public places and mass gatherings  | 6. Economic Stimulus (includes aggregate value of fiscal measures and separately of credit guarantees) | 2. Provision of tools for distance learning (online platforms, TV, radio, distance-learning materials)  |
| 5. Other  | 7. Regulation of the personal hygiene and cleaning products market                                     | 3. Maintenance of school feeding programme (indicating under which modalities)  |
| <b>Health</b>   | 8. Debt relief and suspension of credit payments (individuals, microentrepreneurs)                     | <b>Gender</b>   |
| 1. Health emergency   | 9. Other   | 1. Gender-based violence against women  |
| 2. Mandatory coverage   | <b>Labor</b>   | 2. Care economy   |
| 3. Mandatory quarantine for foreign travelers, confirmed or suspected cases                                   | 1. Labor Protection  | 3. Employment and income generation   |
| 4. Mandatory general quarantine   | 2. Elective work leave   | 4. Benefits, transfers and other social protection measures   |
| 5. Type of policy on testing (universal, reduced to certain groups, etc.)                                     | 3. Reduction of working hours  | 5. Women's participation in the digital era   |
| 6. Free test coverage expansion   | 4. Prohibition of dismissal from work  | 6. Other  |
| 7. Hospitals (mechanical ventilators, additional ICU beds, protection equipment, temporary hospitals, others) | 5. Other   |   |

Source: Survey Team

## 20.2 Macroeconomic analysis and selection of priority countries

### 20.2.1 Macroeconomic analysis

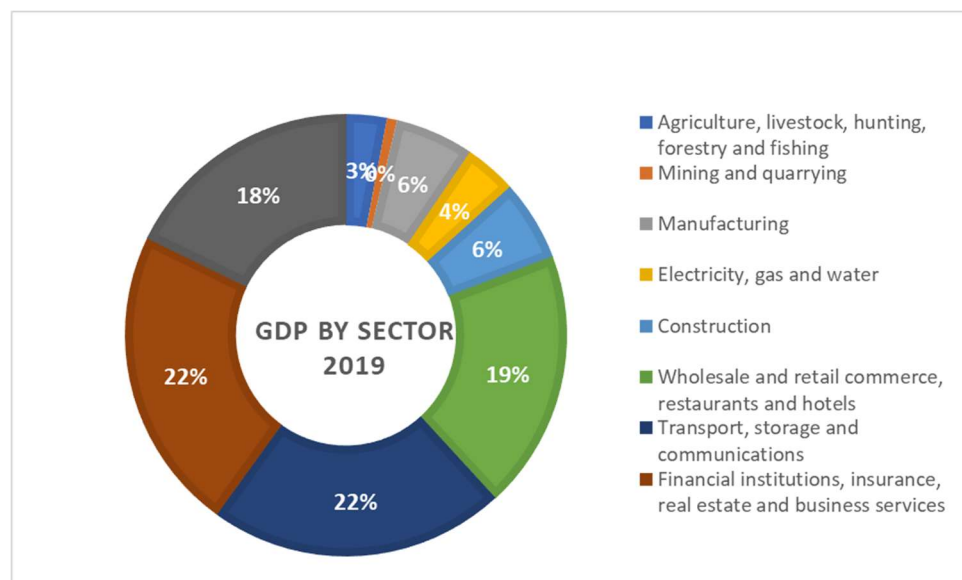
#### (1) Industrial composition

**Table 20-5 Industrial Composition (Saint Lucia)**

Table: GDP by sector (En millones de dólares del Caribe Oriental a precios constantes de 2006)

|  | 2011    | 2012    | 2013    | 2014    | 2015    | 2016    | 2017    | 2018    | 2019a/  | 2020 b/ |
|--|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Agriculture, livestock, hunting, forestry and fishing                | 75.1    | 92.2    | 91.7    | 84.0    | 86.3    | 88.4    | 90.2    | 91.9    | 89.1    |         |
| Mining and quarrying   | 7.3     | 12.9    | 24.5    | 51.1    | 47.2    | 43.0    | 34.5    | 23.2    | 22.2    |         |
| Manufacturing  | 136.9   | 145.7   | 158.6   | 158.5   | 159.5   | 164.7   | 165.5   | 172.1   | 172.3   |         |
| Electricity, gas and water   | 106.7   | 106.1   | 107.3   | 106.2   | 108.2   | 111.3   | 112.2   | 113.4   | 114.0   |         |
| Construction   | 250.7   | 239.2   | 209.0   | 195.3   | 223.8   | 223.1   | 243.7   | 191.3   | 177.3   |         |
| Wholesale and retail commerce, restaurants and hotels                | 470.8   | 475.3   | 451.4   | 482.2   | 460.6   | 475.0   | 507.7   | 547.6   | 566.1   |         |
| Transport, storage and communications                                | 531.9   | 542.4   | 537.0   | 560.0   | 590.9   | 561.1   | 592.9   | 632.1   | 651.7   |         |
| Financial institutions, insurance, real estate and business services | 867.5   | 864.8   | 887.5   | 871.3   | 890.8   | 936.3   | 915.8   | 918.2   | 666.0   |         |
| Community, social and personal services                              | 511.5   | 513.3   | 504.8   | 504.0   | 501.8   | 507.5   | 514.4   | 525.8   | 530.9   |         |
| Total  | 2,958.4 | 2,991.9 | 2,971.7 | 3,012.5 | 3,069.1 | 3,110.4 | 3,176.9 | 3,215.6 | 2,989.7 | 0.0     |

Source: ECLAC



Source: Survey Team



## (2) Trends in major economic indicators

**Table 20-6 Trends in Major Economic Indicator (Saint Lucia)**

Table 1 SANTA LUCIA: MAIN ECONOMIC INDICATORS (Annual growth rates)

|  | 2011   | 2012   | 2013   | 2014   | 2015   | 2016   | 2017   | 2018   | 2019a/ | 2020 b/ |
|--|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------|
| Gross domestic product (Annual growth rates c/)                                      | 4.1    | -0.3   | -2.0   | 1.3    | 0.3    | 3.2    | 2.2    | 1.1    | 1.7    | -26.6   |
| Per capita gross domestic product (Annual growth rates c/)                           | 3.3    | -0.9   | -2.5   | 0.9    | -0.2   | 2.6    | 1.7    | 0.6    | 1.2    | -27.1   |
| Gross domestic product, by sector (Annual growth rates c/)                           |        |        |        |        |        |        |        |        |        |         |
| Agriculture, livestock, hunting, forestry and fishing                                | -6.7   | 22.7   | -0.5   | -8.4   | 2.8    | 2.4    | 2.1    | 1.9    | -3.1   | 1.0     |
| Mining and quarrying   | -3.8   | 77.2   | 89.6   | 108.4  | -7.6   | -8.9   | -19.8  | -32.7  | -4.4   | -6.0    |
| Manufacturing  | 1.6    | 6.4    | 8.8    | -0.0   | 0.7    | 3.2    | 0.5    | 4.0    | 0.1    | -5.3    |
| Electricity, gas and water   | -1.0   | -0.5   | 1.1    | -1.0   | 1.8    | 2.9    | 0.8    | 1.1    | 0.5    | -5.6    |
| Construction   | 1.6    | -4.6   | -12.6  | -6.6   | 14.6   | -0.3   | 9.2    | -21.5  | -7.4   | -10.5   |
| Wholesale and retail commerce, restaurants and hotels                                | 2.0    | 0.9    | -5.0   | 6.8    | -4.5   | 3.1    | 6.9    | 7.9    | 3.4    |         |
| Transport, storage and communications  | -1.5   | 2.0    | -1.0   | 4.3    | 5.5    | -5.0   | 5.7    | 6.6    | 3.1    | -31.7   |
| Financial institutions, insurance, real estate and business services                 | 1.7    | -0.3   | 2.6    | -1.8   | 2.2    | 5.1    | -2.2   | 0.3    | -27.5  | -4.4    |
| Community, social and personal services  | 5.3    | 0.3    | -1.7   | -0.2   | -0.4   | 1.1    | 1.4    | 2.2    | 1.0    | -0.1    |
| Balance of Payments (Millions of dollars)  |        |        |        |        |        |        |        |        |        |         |
| Current account balance  | -242.8 | -175.1 | -146.6 | -43.5  | 0.2    | -121.6 | -19.3  | 44.8   | 91.1   | -276.0  |
| Goods balance  | -421.0 | -353.9 | -345.7 | -457.6 | -388.2 | -485.8 | -482.8 | -509.4 | -479.0 | -464.9  |
| Exports, f.o.b.  | 192.3  | 212.4  | 200.3  | 94.4   | 113.6  | 90.1   | 93.6   | 70.4   | 145.7  | 60.4    |
| Imports, f.o.b.  | 613.2  | 566.4  | 546.0  | 552.0  | 501.8  | 575.9  | 576.4  | 579.7  | 624.7  | 525.3   |
| Services trade balance   | 177.6  | 206.1  | 217.3  | 520.4  | 532.3  | 479.9  | 563.8  | 659.5  | 691.4  |         |
| Income balance   | -20.0  | -33.6  | -22.9  | -106.9 | -152.9 | -114.0 | -106.8 | -112.4 | -128.3 |         |
| Net current transfers  | 20.5   | 6.3    | 4.7    | 0.7    | 9.0    | -1.6   | 6.6    | 7.1    | 7.0    |         |
| Capital and financial balance (Millions of dollars)                                  |        |        |        |        |        |        |        |        |        |         |
| Net foreign direct investment d/   | 80.9   | 73.6   | 92.0   | 97.9   | 129.0  | 149.2  | 58.6   | 66.9   | 48.0   |         |
| Other capital movements d/   | 169.8  | 118.0  | 14.7   | 11.1   | -68.4  | -41.1  | -23.9  | -147.3 | -159.8 |         |
| Foreign remittance from abroad for 2019 and 2020                                     | 230.7  | 157.9  | 83.9   | 2.1    | -92.4  | -5.9   | -72.0  | -192.8 | -240.1 |         |
| Microfinance dispatched and the sectors that received microfinance for 2019 and 2020 |        |        |        |        |        |        |        |        |        |         |

Source: Economic Survey of Latin America and the Caribbean 2020: Main conditioning factors of fiscal and monetary policies in the post-COVID-19 era

### 20.2.2 Impact analysis and identification of key sectors

#### (1) Impact assessment results for each sector by AHP analytic hierarchy process based on economic indicators

**Table 20-7 Results of Sector Impact Analysis by COVID-19 (Saint Lucia)**

| ECLAC category   | Changes around COVID-19 | Trends before COVID-19 | Total GDP ratio of the sector | comprehensive evaluation |   |
|--|-------------------------|------------------------|-------------------------------|--------------------------|---|
| Importance (weight)  | 0.4590                  | 0.0660                 | 0.0750                        |                          |   |
| Agriculture, livestock, hunting, forestry and fishing                | 2                       | 5                      | 2                             | 0.031                    | 8 |
| Mining and quarrying   | 4                       | 9                      | 1                             | 0.056                    | 6 |
| Manufacturing  | 7                       | 8                      | 4                             | 0.090                    | 3 |
| Electricity, gas and water   | 8                       | 3                      | 3                             | 0.091                    | 2 |
| Construction   | 5                       | 1                      | 5                             | 0.061                    | 5 |
| Wholesale and retail commerce, restaurants and hotels                | 6                       | 7                      | 7                             | 0.083                    | 4 |
| Transport, storage and communications                                | 9                       | 6                      | 8                             | 0.114                    | 1 |
| Financial institutions, insurance, real estate and business services | 1                       | 2                      | 9                             | 0.028                    | 9 |
| Community, social and personal services                              | 3                       | 4                      | 6                             | 0.046                    | 7 |

Source: Survey Team

#### 1) ECLAC Sector Classification Amendments to the Sector Classification

In line with the method described in the main volume, the Sector Classification is divided into the Vertical Sector and the Cross-Cutting Sector, the ECLAC classification sector is allocated to the Vertical Sector Classification, and the evaluation of various policies related to COVID-19 taken by the government along with the results of the partner survey and the indicators of the national development

cooperation policy, the ranking of priority sectors are calculated using the four indicators, which are described in the table below.

**Table 20-8 Ranking of Priority Sectors (Saint Lucia)**

|                                   | Economic Indicator Analysis | Government Policy on COVID-19 | Survey on COVID-19 by Development Partners | Country Development Cooperation Policy | Base Case |   | Priority |
|-----------------------------------|-----------------------------|-------------------------------|--|--|-----------|---|----------|
| Importance (weight)               | 0.6000                      | 0.2000                        | 0.1000                                     | 0.1000                                 |           |   |          |
| Social and Economic Policy        | 0.0000                      | 0.0533                        | 0.0000                                     | 0.0000                                 | 0.0533    |   | ○        |
| Health and Nutrition              | 0.0296                      | 0.0667                        | 0.0000                                     | 0.0000                                 | 0.0962    | 4 |          |
| Education                         | 0.0182                      | 0.0133                        | 0.0000                                     | 0.0000                                 | 0.0315    | 6 |          |
| Agriculture and Rural Development | 0.0539                      | 0.0000                        | 0.0125                                     | 0.0167                                 | 0.0830    | 5 |          |
| Manufacturing                     | 0.1719                      | 0.0267                        | 0.0125                                     | 0.0167                                 | 0.2278    | 2 | ○        |
| Environment/ Disaster Management  | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0333                                 | 0.0333    |   | ○        |
| Governance and Security           | 0.0000                      | 0.0400                        | 0.0000                                     | 0.0000                                 | 0.0400    |   | ○        |
| DX Innovation                     | 0.0000                      | 0.0000                        | 0.0375                                     | 0.0000                                 | 0.0375    |   | ○        |
| Infrastructure and Every          | 0.2679                      | 0.0000                        | 0.0125                                     | 0.0167                                 | 0.2971    | 1 | ○        |
| Tourism                           | 0.0586                      | 0.0000                        | 0.0250                                     | 0.0167                                 | 0.1003    | 3 | ○        |
| Public-Private Partnership        | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0000                                 | 0.0000    |   | ○        |

Source: Survey Team

## (2) Sensitivity analysis

### 1) Analysis case settings

Based on the above methodology, the following case settings were made.

**Table 20-9 Sensitivity Analysis Case-based Weighting Settings (Saint Lucia)**

|  | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|--|-----------|------------------------|------------------------|------------------------|
| Economic indicator analysis  | 0.6       | 0.6                    | 0.5                    | 0.5                    |
| Investigation and arrangement of various policies for COVID-19 taken by the government | 0.2       | 0.1                    | 0.1                    | 0.1                    |
| Development partner survey results   | 0.1       | 0.2                    | 0.2                    | 0.3                    |
| Country-specific development cooperation policy  | 0.1       | 0.1                    | 0.2                    | 0.1                    |

Source: Survey Team

### 2) Summary of sensitivity analysis

The results of each sensitivity analysis are as summarized below. Sensitivity analysis showed no significant changes, which were close to the base case results. Error! The link is incorrect.

**Table 20-10 Summary of Sensitivity Analysis Results (Saint Lucia)**

|                                   | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|-----------------------------------|-----------|------------------------|------------------------|------------------------|
| Social and economic policy        |           |                        |                        |                        |
| Health care / nutrition           | 4         | 5                      | 5                      | 5                      |
| education                         | 6         | 6                      | 6                      | 6                      |
| Agriculture / rural development   | 5         | 4                      | 4                      | 4                      |
| Manufacturing industry            | 2         | 2                      | 2                      | 2                      |
| Environment / disaster prevention |           |                        |                        |                        |
| Governance and citizen security   |           |                        |                        |                        |
| DX / Innovation                   |           |                        |                        |                        |
| Infrastructure and Energy         | 1         | 1                      | 1                      | 1                      |
| sightseeing                       | 3         | 3                      | 3                      | 3                      |
| Public-private partnership        |           |                        |                        |                        |

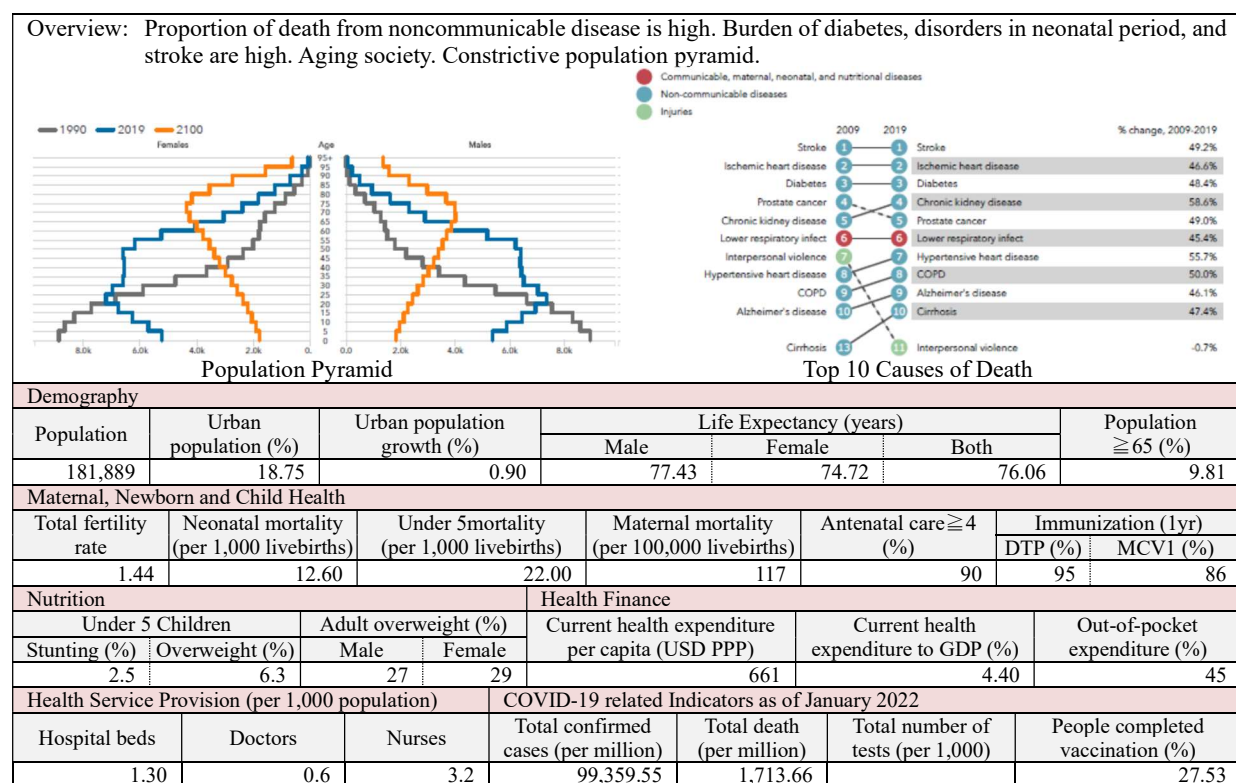
Source: Survey Team

### **(3) Selection of priority sectors by country**

From the above results, 1) social / economic policy, 2) manufacturing industry, 3) environment / disaster prevention, 4) governance / citizen security, 5) DX / innovation, 6) infrastructure / energy, 7) tourism, 8) public-private partnership are selected as priority sectors.

## 20.3 Country-specific information by sector

### 20.3.1 Health care / nutrition



Source: Graphs=Institute for Health Metrics and Evaluation, County Profile; Demography, Total fertility rate, Neonatal mortality, under-5 mortality, Health finance= World Development Indicators, the World Bank (Accessed on Aug 2021); Maternal mortality= UNICEF (Sep 2019); Antenatal care, Immunization, Nutrition, Health service provision,= OECD/The World Bank (2020), Health at a Glance: Latin America and the Caribbean 2020; COVID-19 related indicators= Our World in Data (Accessed on Jan 2022)

| Health                                  |   |
|---|---|
| Leadership/ Governance                  | Responsible Agency: Ministry of Health and Wellness<br><a href="http://www.govt.lc/ministries/health-wellness-human-services-and-gender-relations">http://www.govt.lc/ministries/health-wellness-human-services-and-gender-relations</a><br>Centralized<br>Major Relevant Policies: National Health Sector Policy |
| Service Providing System                | Public sector covers from primary to tertiary level.  |
| Health Finance                          | Government fund, but high out-of-pocket expenses  |
| Human Resource for Health               | Because of absence of medical education institution, health personnel are educated abroad. Especially, specialized doctors and nurses are not sufficient. Due to budget constraint, sufficient quantity of health personnel could be hired.   |
| IT/ Digital Health                      | (No information)  |
| Drugs/ Medical Equipment                | Certain level of budget and human resources are ensured for maintenance of medical equipment. Each hospital prepares medical equipment database. Drugs are procured and distributed by the Ministry of Health.  |
| Priority                                | Noncommunicable diseases, strengthening of people-centered health system, development of resilient community  |
| Communicable Disease Emergency Response | To enhance core capacity of the International Health Regulation (IHR), the Quarantine Law was revised, and a radiation emergency medical management system has been developed.  |
| Major Development Partners              | PAHO/WHO, World Bank, EU, PEPFER, World Bank, EU (Project Support to the Saint Lucia Health Sector), PEPFAR, Global Fund (testing, surveillance, etc.)  |
| Nutrition                               |   |
| Institutional Arrangement               | Ministry of Health  |
| Major Relevant Policies                 | Food and Nutrition Strategies and Plan of Action, 2006  |
| Human Resource for Health               | Nutrition related degrees: No<br>Nutrition related subjects in pre-service education: No<br>Number of nutrition related professionals: 4.0 per 100,000 population   |

Source: Survey Team with reference to WHO Country Cooperation Strategy for Saint Lucia at a glance, May 2018, Institute for Health Metrics and Evaluation, County Profile, WHO, Global atlas of medical devices, 2017, and WHO, Nutrition Landscape Information System (NLIS)

## 20.3.2 Education

| Overview  |   |  |               |                 |                 |
|---|---|--|---------------|-----------------|-----------------|
| Number of children  | Education level   | Preschool  | primary       | Lower secondary | Upper secondary |
|   | 2019  | 3,236 people   | 15,693 people | 6,690 people    | 4,704 people    |
| Source: Institute for Statistics (UIS), UNESCO Bureau of Statistics |   |  |               |                 |                 |
| Government authority  | Ministry of Education, Innovation, Science, Technology and Vocational Training  |  |               |                 |                 |
| Education indicator   | Net enrollment rate: primary education 98.3%, lower secondary 90.3%, upper secondary 79.3% (2019)<br>Primary education completion rate 99.8% (2019), out-of-school children rate 1.7% (2019), public education budget GDP ratio 3.3% (2019) Source: UIS   |  |               |                 |                 |
| Impact of COVID-19  |   |  |               |                 |                 |
| School closure / reopening  | From March 11, 2020 to February 2, 2021, 100 days of complete closure and 50 days of partial closure. From February 2021, hybrid classes are held. Extension of vacation from July.   |  |               |                 |                 |
| COVID-19 measures   | Implemented measures based on the strategy created by the Association of Caribbean States as COVID-19 measures. Providing electronic devices for teachers and students, psychosocial support, providing meals for disadvantaged students, activities to meet the psychosocial needs of teachers, creating videos explaining the current situation for special needs students, Elimination of digital divide   |  |               |                 |                 |
| Distance education  | Implementation status   | An online platform has been set up to conduct distance lessons and distribute printed materials to students who cannot access to the Internet. There is no TV or radio broadcasting.<br>Distance Education Readiness Index published by UNICEF is Level 3 "Distance education systems are considered to be relatively resilient, but the potential for learning loss and whether or not equivalent learning can be continued if face-to-face lessons are interrupted. Serious concerns remain. " |               |                 |                 |
|   | access  | School-aged children / students who can connect to the Internet at home (%) (2012)   |               |                 |                 |
|   |   | year 2012  | Rural area    | Urban area      | Poor            |
|   | Whole school age  | 48   | 44            | 12              | 48              |
|   | Primary Education   | 44   | 47            | 12              | 44              |
|   | Lower secondary education   | 52   | 44            | 15              | 50              |
|   | Upper secondary education   | 53   | 43            | 7               | 51              |
|   | Source: UNICEF Global database on school-age digital connectivity<br>Internet access rate for educational purposes in schools: 98.75% for primary and 100% for secondary education (UNESCO)   |  |               |                 |                 |
|   | Teacher training  | N / A  |               |                 |                 |
| School hygiene  | Infection control measures  | The safety guide for reopening the school is prepared by UNICEF.   |               |                 |                 |
|   | Facility maintenance  | About 100% of schools have a basic hand-washing facilities. Source: World Bank / UNICEF Survey <a href="https://washdata.org/">https://washdata.org/</a>   |               |                 |                 |
| School lunch / nutrition  | N / A   |  |               |                 |                 |
| Countermeasures for vulnerable people                               | N / A   |  |               |                 |                 |
| Support for donors, etc.  | UNICEF: US \$ 3 million Grant Aid (Dominica, Grenada, St. Lucia, St. Vincent) COVID-19 Education policy and effective countermeasures for the disaster, distance learning platform for vulnerable children, digital teaching materials distribution, development of online teaching content for radio and TV education programs, collaboration with the private sector to improve access to primary and secondary education level learning platforms, teacher training for distance learning technology acquisition, schools sanitary infrastructure development in vulnerable areas<br>GPE: Distribution of tablets to vulnerable children for COVID-19 countermeasures (GPE grant US \$ 70,000) |  |               |                 |                 |

Source: Survey Team

### 20.3.3 Agriculture / rural development

|   |  |         |          |          |          |          |
|---|--|---------|----------|----------|----------|----------|
| Urban / rural population ratio                    | 18.7% / 81.3% (FAOSTAT 2018)   |         |          |          |          |          |
| Agricultural land area                            | 10,600 ha (FAOSTAT 2019) 1)  |         |          |          |          |          |
| Agricultural sector employment                    | 9.8% of all employment (male / female ratio: 85.7% / 14.3) (FAOSTAT 2019) 2)   |         |          |          |          |          |
| Agricultural GDP                                  | 2.6% of total GDP (World Bank 2020)  |         |          |          |          |          |
| Of the agricultural sector Value added amount     | \$ 39,954.68 thousand (World Bank 2020) 3) * Statistics include forestry   |         |          |          |          |          |
| Agricultural sector expenditure ratio             | Ratio of agricultural fiscal expenditure to national budget (%) 4)   |         |          |          |          |          |
|   | 2018   | 2019    | 2020     |          |          |          |
|   | 2.10   | 2.22    | 2.58     |          |          |          |
| Agricultural sector import / export balance       | Trade Balance (USD1,000 FAOSTAT) 5)  |         |          |          |          |          |
|   |  | 2015    | 2016     | 2017     | 2018     | 2019     |
|   | export   | 41,731  | 43,432   | 42,689   | 36,791   | 37,392   |
|   | Import   | 129,515 | 148,115  | 154,440  | 162,396  | 159,346  |
|   | Balance of payments  | -87,784 | -104,683 | -111,751 | -125,605 | -121,954 |
| Agricultural development Policy / plan / strategy | <p>Banana production, which is valued for agricultural production, is an important crop that provides a stable source of income for rural people in St. Lucia, but production declines due to the spread of black sigatoka and loss of preferential trade access to the EU , Has a dramatic impact on food security in St. Lucia, and a shift to a diverse agricultural production system is desired 6). Challenges faced by producers today include lack of access to markets, technology and funding, but according to a study conducted in Centrusia (Simpson 2012) 7), island farmers are experiencing climate change. It has been suggested that the knowledge and financing capacity of technologies related to adaptation to and alternative production technologies are relatively low.</p> <p><u>The Sector Adaptation Strategy and Action Plan for the Agricultural Sector (Agriculture SASAP) 2018-20288) overcomes many challenges such as policy, regulation, technology, finance, business and society, and climate change-resistant agricultural best practices and businesses. Developed with the goal of promoting by adoption of, it consists of 45 adaptations to increase agricultural productivity and sustainability. At the same time, it also has the purpose of contributing to the reduction of greenhouse gas emissions by increasing the carbon storage capacity of the earth system and increasing the efficiency of resource utilization. Furthermore, with the aim of reducing poverty in rural areas, there are two adaptation measures: "active involvement of the private sector in building community climate resilience and promotion of partnership development" and "improvement of access to climate change adaptation financing institutions". We are prioritizing implementation.</u></p> <p>The Caribbean Agricultural Research and Development Institute (CARDI), of which Centrusia is a member, is an organization that conducts research and development aimed at improving the competitiveness and sustainability of the regional agricultural sector, and is a strategic plan that is a roadmap for five years. 2018-20229) was created. This strategic program focuses on products identified as economically important to the CARICOM region, while maintaining consistency and coordination with each country's unique strategic plans and policies, regional strategies and policies, global strategies and policies. I'm guessing. CARDI divides its member countries into three groups from the aspect of strategic approach according to the economic structure of each country, and Saint Lucia belongs to the third group. This group is an OECS country and the R &amp; D department is very dependent on CARDI. Countries with a strong sense of crisis about food security are focused on the development of high value products and centralized and innovative systems.</p> |         |          |          |          |          |
| Impact of COVID-19                                | <p>The pandemic reduced real GDP by an estimated 20.4% in 2020, the largest decrease since 1980 (World Bank 2021) 10). The decline in tourism, which accounts for about 40.7% of GDP, is accelerating economic contractions and rising unemployment, with a significant impact on the fisheries sector. Demand for local tourist destinations is declining, and there are many problems such as restrictions on access to fishing, including government shutdowns.</p> <p>Through the Department of Agriculture, the Government of Saint Lucia is working to support fishermen around the island under the influence of the COVID-19 pandemic, and has provided a \$ 500 EC grant to qualified fishermen11).</p> <p>According to the results of a questionnaire survey conducted by the Caribbean Community (CARICOM) and the United Nations World Food Program (WFP) in April 202012), 76% of respondents in Saint Lucia said that the pandemic affected market access. This result was significantly higher than the regional average. Also, there is no guarantee that food, hygiene products and medicines will always be available in stores, with 46% of respondents observing rising food prices. In Saint Lucia, 9.97% of all employment (World Bank 2019) 13) is engaged in agriculture, but this survey found that 37% of respondents are involved in agriculture and 6% are involved in fishing. Both were</p>  |         |          |          |          |          |

|                    |   |
|--------------------|---|
|                    | mainly for self-consumption. Such self-defense actions for kitchen gardens may be re-evaluated as a food crisis mitigation measure in an emergency.   |
| Source / reference | <p>1) FAOSTAT-Land, Input and Sustainability-Land Use-Area-Agriculture (<a href="https://www.fao.org/faostat/en/#data/RL">https://www.fao.org/faostat/en/#data/RL</a>)</p> <p>2) FAOSTAT- Share of employment in agriculture (% of total employment) &amp; Share of female employment in agriculture (% of employment in agriculture) (<a href="https://www.fao.org/faostat/en/#data/OE">https://www.fao.org/faostat/en/#data/OE</a>)</p> <p>3) Agriculture, forestry, and fishing, value added (constant 2015 US \$) --Latin America &amp; Caribbean (<a href="https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart">https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart</a>)</p> <p>4) FAOSTAT-Government Expenditure-Share of Total Expenditure-Central Government (<a href="https://www.fao.org/faostat/en/#data/IG">https://www.fao.org/faostat/en/#data/IG</a>)</p> <p>5) FAOSTAT-Trade-Crops and livestock products-Import / Export Value-Agricultural Products (<a href="https://www.fao.org/faostat/en/#data/TCL">https://www.fao.org/faostat/en/#data/TCL</a>)</p> <p>6) Climate Change and Agriculture   Saint Lucia, 2017, IICA (<a href="https://repositorio.iica.int/bitstream/handle/11324/7051/BVE18040211i.pdf?sequence=1">https://repositorio.iica.int/bitstream/handle/11324/7051/BVE18040211i.pdf?sequence=1</a>)</p> <p>7) CARIBSAVE Climate Change Risk Profile for Saint Lucia (<a href="http://dms.caribbeanclimate.bz/M-Files/openfile.aspx?objtype=0&amp;docid=5040">http://dms.caribbeanclimate.bz/M-Files/openfile.aspx?objtype=0&amp;docid=5040</a>)</p> <p>8) Saint Lucia's Sectoral Adaptation Strategy and Action Plan for the Agriculture Sector (Agriculture SASAP) 2018-2028 (<a href="https://www.unfccc.int/sites/NAPC/Documents/Parties/Saint%20Lucia%E2%80%99s%20Sectoral%20Strategy%20and%20Action%20Plan%20for%20Agriculture.pdf">https://www.unfccc.int/sites/NAPC/Documents/Parties/Saint%20Lucia%E2%80%99s%20Sectoral%20Strategy%20and%20Action%20Plan%20for%20Agriculture.pdf</a>)</p> <p>9) CARDI Strategic Plan 2018-2022 (<a href="http://www.cardi.org/wp-content/uploads/downloads/2018/05/CARDI-Strategic-Plan-2018-to-2022-Final.pdf">http://www.cardi.org/wp-content/uploads/downloads/2018/05/CARDI-Strategic-Plan-2018-to-2022-Final.pdf</a>)</p> <p>10) <a href="https://pubdocs.worldbank.org/en/681431582655269212/mpo-lca.pdf">https://pubdocs.worldbank.org/en/681431582655269212/mpo-lca.pdf</a></p> <p>11) Income support for fisherfolk (<a href="http://www.govt.lc/news/income-support-for-fisherfolk">http://www.govt.lc/news/income-support-for-fisherfolk</a>)</p> <p>12) Caribbean COVID-19 Food Security &amp; Livelihoods Impact Survey Saint Lucia Summary Report   May 2020 (<a href="https://docs.wfp.org/api/documents/WFP-0000116006/download/">https://docs.wfp.org/api/documents/WFP-0000116006/download/</a>)</p> <p>13) Employment in agriculture (% of total employment) (modeled ILO estimate) --St. Lucia, Caribbean small states (<a href="https://data.worldbank.org/indicator/SL.AGR.EMPL.ZS?view=chart&amp;locations=LC-S3">https://data.worldbank.org/indicator/SL.AGR.EMPL.ZS?view=chart&amp;locations=LC-S3</a>)</p> |

### 20.3.4 Private sector

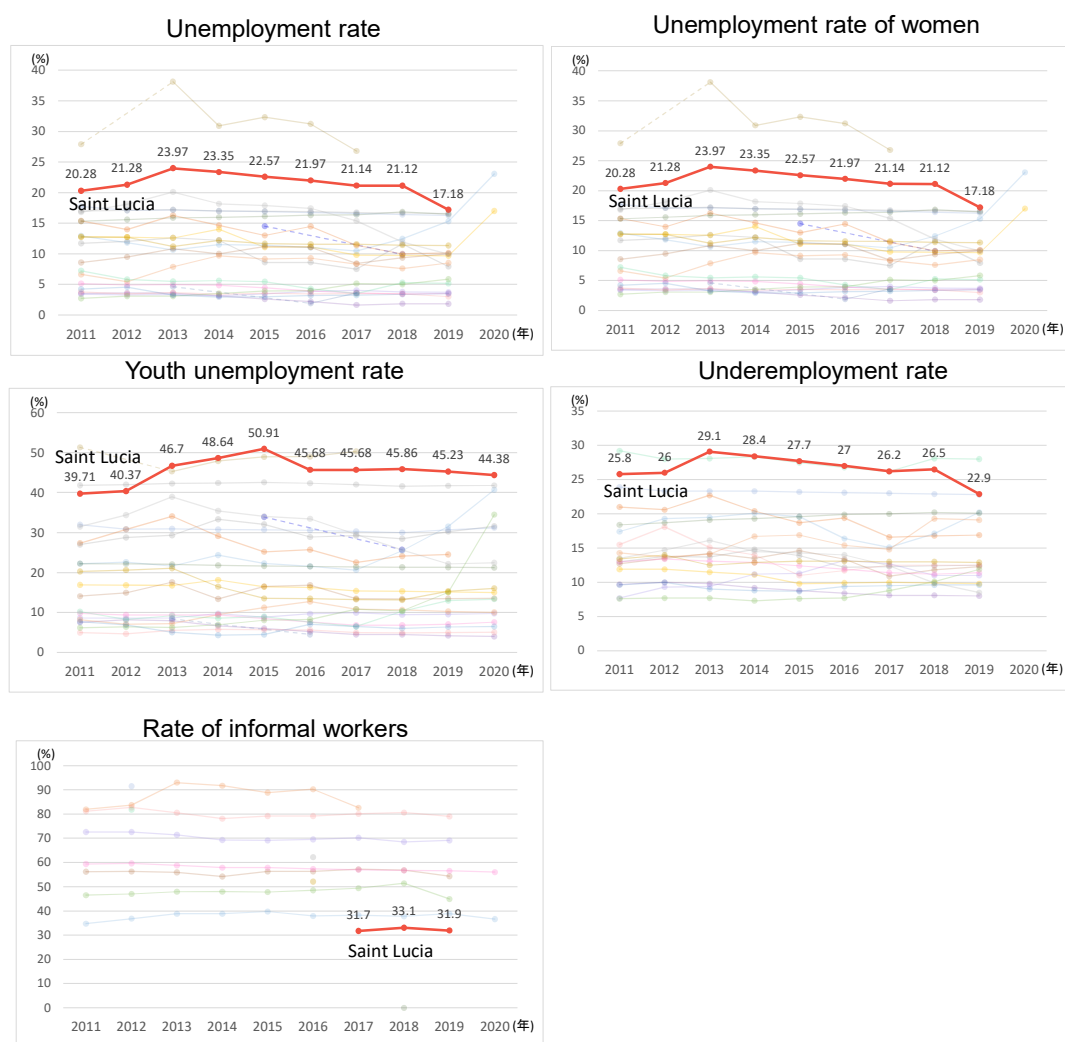
Saint Lucia is a country with a small economy (17th) but a medium GDP per capita (9th). The poor employment situation is serious because the minimum wage is very low and the unemployment rate is very high. The unemployment rate improved significantly in 2019, but there are concerns about the situation after 2020, which would be affected by COVID-19.

|              | Index                      | Value  | Ranking                 | Year | Source             |
|--------------|----------------------------|--------|-------------------------|------|--------------------|
| Productivity | GDP per capita (USD)       | 9,276  | 9 (Among 22 countries)  | 2020 | World Bank         |
|              | GDP per worker (USD)       | 30,883 | 10 (Among 18 countries) | 2019 | World Bank         |
| Employment   | Minimum wage (USD / month) | 59     | 21 (Among 23 countries) | 2019 | ILO                |
|              | Unemployment rate          | 20.71  | 21 (Among 22 countries) | 2019 | Statista           |
|              | Female unemployment rate   | 17.18  | 21 (Among 22 countries) | 2019 | The Global Economy |
|              | Youth unemployment rate    | 45.23  | 21 (Among 22 countries) | 2019 | Statista           |
|              | Underemployment rate       | 22.9   | 17 (Among 18 countries) | 2019 | ILO                |
|              | Informal worker rate       | 31.9   | 1 (Among 12 countries)  | 2019 | CEPAL              |

Source: Described in the table



Changes in unemployment rate, etc.



Source: World Bank, ILO, The Global Economy, etc.

### 20.3.5 Environment / disaster prevention

|                     | item   | data   | remarks                          |
|---------------------|--|--|----------------------------------|
| environment         | Environmental agency                                     | Ministry of Sustainable Development, Energy, Science and Technology                    |                                  |
|                     | Waste-related organizations                              | Saint Lucia Solid Waste Management Authority   |                                  |
|                     | Environmental Budget (USD)                               | 2019: 7,289,636<br>2020: 8,717,644<br>2021: 7,380,723<br>Three-year average: 7,796,001 | Average: 9th out of 23 countries |
|                     | Environmental budget per capita (2019-2021 average, USD) | 42.4   | 4th out of 23 countries          |
|                     | Budget ratio to national budget (2019)                   | 1.24%  | 4th out of 23 countries          |
|                     | Donor support status                                     | 1  | As of May 2021                   |
|                     | Renewable energy power generation (GWh) (2019)           | 3  | IRENA, 2021                      |
|                     | Geothermal power generation capacity (MWe)               | 2020: 0<br>2025 Forecast: 0<br>Potential: 30.00  | WGC, 2020                        |
| Disaster prevention | Disaster prevention organization                         | National Emergency Management Organization (NEMO) Saint Lucia                          |                                  |
|                     | Donor support status                                     | 3 cases  | As of May 2021                   |

|  |  |   |                         |
|--|--|---|-------------------------|
|  | Number of natural disasters (2010-2020)            | 3 cases<br>Major disasters: floods,<br>droughts |                         |
|  | Number of victims (persons) per 100,000 population | 11,948 people                                   | 8th out of 23 countries |

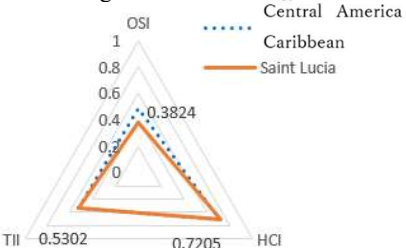
Source: Survey Team

### 20.3.6 Governance and citizen security

| Item                                    | Overview   |                             |         |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
|---|--|-----------------------------|---------|-------------------------|-------------------------|--------------------------|-----------------------------|------|-----|------|-----|-----------|------|-----|------|-----|------|-----|-----|---|-----------------------------|------|-----|------|-----|-----------|------|-----|------|-----|------|-----|-----|--------------------------|-----------------------------|------|-----|------|-----|-----------|------|-----|------|-----|------|-----|-----|--------------------|-----------------------------|------|-----|------|-----|-----------|------|-----|------|-----|------|-----|-----|-------------|-----------------------------|------|-----|------|-----|-----------|------|-----|------|-----|------|-----|-----|-----------------------|-----------------------------|------|-----|------|-----|-----------|------|-----|------|-----|------|-----|-----|
| Political system                        | Parliamentary democracy under the constitutional monarchy belonging to the Commonwealth of Nations   |                             |         |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
| Election system                         | The monarch is hereditary. The governor is appointed by the monarch. After the legislative elections, the head of a majority party or coalition government is appointed prime minister by the governor.  |                             |         |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
| Legislative system                      | Bicameral parliament   |                             |         |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
| Most recent / next legislative election | Senate: July 12, 2016 (next time in 2021)<br>House of Representatives: July 26, 2021 (next time scheduled for 2026)  |                             |         |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
| Appointment of judicial system / judge  | The President of the Eastern Caribbean Supreme Court is appointed by the Queen of England. Other judges are appointed by the Judicial and Legal Services Committee, an independent body of judicial officers.  |                             |         |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
| Political stability                     | Stable   |                             |         |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
| "Worldwide Governance Indicators"       | <p>Each indicator is above the regional average, but since 2014, the level of "government effectiveness" has deteriorated.</p> <table border="1"> <caption>Approximate Percentile Ranks from WGI Chart</caption> <thead> <tr> <th>Indicator</th> <th>Country</th> <th>Year</th> <th>Percentile Rank (0-100)</th> </tr> </thead> <tbody> <tr> <td rowspan="6">Voice and Accountability</td> <td rowspan="2">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~60</td> </tr> <tr> <td>2019</td> <td>~60</td> </tr> <tr> <td rowspan="4">St. Lucia</td> <td>2010</td> <td>~85</td> </tr> <tr> <td>2019</td> <td>~80</td> </tr> <tr> <td rowspan="2">2020</td> <td>~75</td> </tr> <tr> <td>~70</td> </tr> <tr> <td rowspan="6">Political Stability and Absence of Violence/Terrorism</td> <td rowspan="2">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td rowspan="4">St. Lucia</td> <td>2010</td> <td>~75</td> </tr> <tr> <td>2019</td> <td>~75</td> </tr> <tr> <td rowspan="2">2020</td> <td>~70</td> </tr> <tr> <td>~65</td> </tr> <tr> <td rowspan="6">Government Effectiveness</td> <td rowspan="2">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~50</td> </tr> <tr> <td rowspan="4">St. Lucia</td> <td>2010</td> <td>~75</td> </tr> <tr> <td>2019</td> <td>~65</td> </tr> <tr> <td rowspan="2">2020</td> <td>~55</td> </tr> <tr> <td>~50</td> </tr> <tr> <td rowspan="6">Regulatory Quality</td> <td rowspan="2">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td rowspan="4">St. Lucia</td> <td>2010</td> <td>~75</td> </tr> <tr> <td>2019</td> <td>~70</td> </tr> <tr> <td rowspan="2">2020</td> <td>~65</td> </tr> <tr> <td>~60</td> </tr> <tr> <td rowspan="6">Rule of Law</td> <td rowspan="2">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td rowspan="4">St. Lucia</td> <td>2010</td> <td>~75</td> </tr> <tr> <td>2019</td> <td>~70</td> </tr> <tr> <td rowspan="2">2020</td> <td>~65</td> </tr> <tr> <td>~60</td> </tr> <tr> <td rowspan="6">Control of Corruption</td> <td rowspan="2">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td rowspan="4">St. Lucia</td> <td>2010</td> <td>~85</td> </tr> <tr> <td>2019</td> <td>~75</td> </tr> <tr> <td rowspan="2">2020</td> <td>~70</td> </tr> <tr> <td>~65</td> </tr> </tbody> </table> | Indicator                   | Country | Year                    | Percentile Rank (0-100) | Voice and Accountability | * Latin America & Caribbean | 2010 | ~60 | 2019 | ~60 | St. Lucia | 2010 | ~85 | 2019 | ~80 | 2020 | ~75 | ~70 | Political Stability and Absence of Violence/Terrorism | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | St. Lucia | 2010 | ~75 | 2019 | ~75 | 2020 | ~70 | ~65 | Government Effectiveness | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~50 | St. Lucia | 2010 | ~75 | 2019 | ~65 | 2020 | ~55 | ~50 | Regulatory Quality | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | St. Lucia | 2010 | ~75 | 2019 | ~70 | 2020 | ~65 | ~60 | Rule of Law | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | St. Lucia | 2010 | ~75 | 2019 | ~70 | 2020 | ~65 | ~60 | Control of Corruption | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | St. Lucia | 2010 | ~85 | 2019 | ~75 | 2020 | ~70 | ~65 |
|   | Indicator  | Country                     | Year    | Percentile Rank (0-100) |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
|   | Voice and Accountability   | * Latin America & Caribbean | 2010    | ~60                     |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
|   |  |                             | 2019    | ~60                     |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
|   |  | St. Lucia                   | 2010    | ~85                     |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
|   |  |                             | 2019    | ~80                     |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
|   |  |                             | 2020    | ~75                     |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
|   |  |                             |         | ~70                     |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
|   | Political Stability and Absence of Violence/Terrorism  | * Latin America & Caribbean | 2010    | ~55                     |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
|   |  |                             | 2019    | ~55                     |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
| St. Lucia                               |  | 2010                        | ~75     |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
|   |  | 2019                        | ~75     |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
|   |  | 2020                        | ~70     |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
|   |  |                             | ~65     |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
| Government Effectiveness                | * Latin America & Caribbean  | 2010                        | ~55     |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
|   |  | 2019                        | ~50     |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
|   | St. Lucia  | 2010                        | ~75     |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
|   |  | 2019                        | ~65     |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
|   |  | 2020                        | ~55     |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
|   |  |                             | ~50     |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
| Regulatory Quality                      | * Latin America & Caribbean  | 2010                        | ~55     |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
|   |  | 2019                        | ~55     |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
|   | St. Lucia  | 2010                        | ~75     |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
|   |  | 2019                        | ~70     |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
|   |  | 2020                        | ~65     |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
|   |  |                             | ~60     |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
| Rule of Law                             | * Latin America & Caribbean  | 2010                        | ~55     |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
|   |  | 2019                        | ~55     |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
|   | St. Lucia  | 2010                        | ~75     |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
|   |  | 2019                        | ~70     |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
|   |  | 2020                        | ~65     |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
|   |  |                             | ~60     |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
| Control of Corruption                   | * Latin America & Caribbean  | 2010                        | ~55     |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
|   |  | 2019                        | ~55     |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
|   | St. Lucia  | 2010                        | ~85     |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
|   |  | 2019                        | ~75     |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
|   |  | 2020                        | ~70     |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
|   |  |                             | ~65     |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
| Global freedom status                   | N / A  |                             |         |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
| Corruption Perception Index (CPI)       | 45/180, 56/100 points (Transparency International 2020)  |                             |         |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
| E-government development index          | It is lower than the regional average, especially the development of online service indicators and communication infrastructure are lagging behind the region. In terms of human capital, it is slightly lower than the Latin American regional average but higher than the global level.  |                             |         |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
| Rule of law                             | According to WGI, the level of "rule of law" is high and stable.   |                             |         |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |
| Citizen security                        | The homicide rate is also high compared to the Caribbean region average. The homicide rate in 2018 was 21.4 / 100,000 (the same year, the Caribbean average was 12.1 and the world average was 5.8) (UNODC 2021).  |                             |         |                         |                         |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |   |                             |      |     |      |     |           |      |     |      |     |      |     |     |                          |                             |      |     |      |     |           |      |     |      |     |      |     |     |                    |                             |      |     |      |     |           |      |     |      |     |      |     |     |             |                             |      |     |      |     |           |      |     |      |     |      |     |     |                       |                             |      |     |      |     |           |      |     |      |     |      |     |     |

Source: Survey Team

## 20.3.7 DX / Innovation

|   |  |   |
|---|--|---|
| <p>Basic indicators and statistics</p>  | <p>E-Government Ranking 1): 112th</p> <p>Mobile connection index 2): 57.7</p> <p>Network Infrastructure Index: 47.6</p> <p>Internet user rate 56.8</p> <p>Mobile connection rate 107.3</p> <p>Fixed broadband rate 17.7</p> <p>Rate of increase in the number of Internet users 12.2 (2021/2020)</p> | <p>Radar chart of e-government ranking</p>  |
| <p>Communication network</p>  |  |   |
| <p>Saint Lucia is one of the five countries that make up the Organization of Eastern Caribbean States (ECTEL) 4), an organization of the Organization of Eastern Caribbean States (OECS) 3). One of the purposes of establishing ECTEL is to liberalize the telecommunications sector of OECS members, which is included in the OECS Telecommunications Reform Project started jointly with the World Bank in 1998. To that end, it was necessary to smoothly conclude an exclusive license agreement with Cable &amp; Wireless (C &amp; W), a British company that had monopolized the sector until then 5). ECTEL promotes market liberalization and competition in the region, complemented by the National Telecommunications Regulatory Commission (NTRC) 6) in Saint Lucia.</p> <p>In 2004, the restrictions on investment in the service sector were lifted, and the telecommunications sector in Saint Lucia was completely liberalized 5). Digicel, an Irish company, has entered the market since 2003, and one month later, the US company AT &amp; T Wireless started operation, which promoted market competition including C &amp; W, which has been in the market for some time. With the liberalization, the mobile phone penetration rate 7) has grown rapidly from 1.7% (2001) to 62.4% (2004).</p> <p>Major telecommunications providers include Digicel and Flow (formerly branded LIME: C &amp; W), both of which offer mobile and Internet services. Flow started in 2017 for 4G / LTE services 8), Digicel was introduced only in some areas in 2016, and will be available in all areas in 2018 9).</p> <p>In 2014, the Saint Lucia Internet Exchange (SLiX) aimed at allowing each network to directly interconnect without going through a third party in another country to improve the speed, reliability, security and restoring of the domestic Internet. ) Have been agreed 10).</p> |  |   |
| <p>National Strategy for Digital Transformation</p>   |  |   |
| <p>The National ICT Strategy 2010-2015 11) has four goals: 1) Effective governance and widespread e-service provision, 2) Significant economic growth by creating new employment opportunities, 3) Citizens' health and welfare. The program has been developed around improving citizen information literacy and innovation, but the country has not yet adopted an e-commerce policy to promote the effective functioning of the private sector. The Medium-Term Development Strategy 2020-2023 12) provides various Digital Government Service Platforms (Digi-Gov) Initiatives 13) to address these challenges and formulates policies to promote development in the private sector.</p> <p>The government has a Public Sector Modernization Department (DPSM) established in the Department of Public Services, responsible for IT technology, e-government, legal and regulatory frameworks for telecommunications, structural reforms, policy implementation and process monitoring. It offers 154 public services through the Digi-Gov platform.</p> <p>The Government of Saint Lucia continues to implement the Caribbean DX Project 14) with a World Bank loan (28 USD million). The project builds foundational items such as digital infrastructure, digital platforms, digital financial services, digital skills, digital entrepreneurship and innovation to enable a dynamic and secure digital economy through a comprehensive ecosystem approach. It is an object.</p>   |  |   |
| <p>Characteristic efforts</p>   |  |   |
| <p>One of the strengths of Centrusia's healthcare system is the Environmental Health Information System (EHIS) 15) maintained by the Health Management Information Unit (HMIU), which is integrated with the Environmental Health Department. Through the Disaster Vulnerability Reduction Project (DVRP-CERC) 16), EHIS has added the COVID-19 Surveillance Digital Data Package. This digital data package provides a comprehensive solution for COVID-19 tracking and monitoring for clinical testing / lab testing / results, port of entry screening / community follow-up, contact tracing and outbreak line listings. Contains modules. EHIS is also enhanced by updating the underlying software and debugging existing modules.</p> <p>Databases and monitoring and information systems capable of statistical, geospatial, and epidemiological analysis are needed to develop optimal measures against pandemics in the future 15).</p>   |  |   |
| <p>source</p>   |  |   |
| <p>169. E-Gov-Index: a composite indicator that consists of three indexes (Online Service Index, Telecommunication Infrastructure Index and Human Capital Index), which are equally weighted. It ranges from 0 to 1, with 1 being the most developed.</p> <p>170. Mobile Connectivity Index: an input index developed by GSMA to measure the performance against the four key enablers of mobile internet adoption – infrastructure, affordability, consumer readiness and content. (https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2016/06/Mobile-Connectivity-Launch-Report.pdf)</p> <p>171. Organization of Eastern Caribbean States<br/><a href="https://www.oecs.org/en/who-we-are/about-us">https://www.oecs.org/en/who-we-are/about-us</a></p> <p>172. Eastern Caribbean Telecommunications Authority<br/><a href="https://www.ectel.int/about-ectel/">https://www.ectel.int/about-ectel/</a></p> <p>173. TRADE POLICY REVIEW Report by SAINT LUCIA<br/><a href="https://docs.wto.org/dol2fe/Pages/FE_Search/DDFDocuments/79524/Q/WT/TPR/G190LCA.pdf">https://docs.wto.org/dol2fe/Pages/FE_Search/DDFDocuments/79524/Q/WT/TPR/G190LCA.pdf</a></p> <p>174. <a href="https://www.ntreslu.lc/">https://www.ntreslu.lc/</a></p> <p>175. Mobile cellular subscriptions (per 100 people) --Latin America &amp; Caribbean, St. Lucia<br/><a href="https://data.worldbank.org/indicator/IT.CEL.SETS.P2?locations=ZJ-LC">https://data.worldbank.org/indicator/IT.CEL.SETS.P2?locations=ZJ-LC</a></p> <p>176. Flow (Saint Lucia) switches on LTE</p>   |  |   |

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|------|---|
| 177. | <a href="https://www.commsupdate.com/articles/2017/09/18/flow-saint-lucia-switches-on-lte/">https://www.commsupdate.com/articles/2017/09/18/flow-saint-lucia-switches-on-lte/</a>   |
| 178. | Digicel Saint Lucia LTE network live island-wide <a href="https://www.commsupdate.com/articles/2018/11/12/digicel-saint-lucia-lte-network-live-island-wide/">https://www.commsupdate.com/articles/2018/11/12/digicel-saint-lucia-lte-network-live-island-wide/</a>  |
| 179. | Digicel joins Saint Lucia Internet Exchange <a href="https://www.commsupdate.com/articles/2015/04/07/digicel-joins-saint-lucia-internet-exchange/">https://www.commsupdate.com/articles/2015/04/07/digicel-joins-saint-lucia-internet-exchange/</a>   |
| 179. | National ICT Strategy of St. Lucia 2010-2015: <a href="http://www.caribbeanelections.com/eDocs/strategy/lc_strategy/lc_National ICT_Strategy_2010.pdf">http://www.caribbeanelections.com/eDocs/strategy/lc_strategy/lc_National ICT_Strategy_2010.pdf</a>   |
| 180. | Medium Term Development Strategy 2020 --2023 of St. Lucia:<br><a href="http://observatorioplanificacion.cepal.org/sites/default/files/plan/files/Saint%20Lucia%20MTDS%202020-2023%20SMALL%20%282%29.pdf">http://observatorioplanificacion.cepal.org/sites/default/files/plan/files/Saint%20Lucia%20MTDS%202020-2023%20SMALL%20%282%29.pdf</a>   |
| 181. | <a href="https://digigov.govt.lc/portal/mvvmc/eservices/slsgPublicPortal.public.aboutUs">https://digigov.govt.lc/portal/mvvmc/eservices/slsgPublicPortal.public.aboutUs</a>   |
| 182. | Caribbean Digital Transformation Project<br><a href="https://documents1.worldbank.org/curated/en/848701593136915061/pdf/Dominica-Grenada-St-Lucia-St-Vincent-and-the-Grenadines-and-the-Organization-of-Eastern-Caribbean-States-Caribbean-Digital-Transformation-Project-Digital-Caribbean.pdf">https://documents1.worldbank.org/curated/en/848701593136915061/pdf/Dominica-Grenada-St-Lucia-St-Vincent-and-the-Grenadines-and-the-Organization-of-Eastern-Caribbean-States-Caribbean-Digital-Transformation-Project-Digital-Caribbean.pdf</a> |
| 183. | DVRP to boost COVID-19 surveillance through Environmental Health Information System <a href="http://www.govt.lc/news/dvrp-to-boost-COVID-19-surveillance-through-environmental-health-information-system">http://www.govt.lc/news/dvrp-to-boost-COVID-19-surveillance-through-environmental-health-information-system</a>   |
| 184. | Contingency Emergency Response Component (CERC)<br><a href="http://dvrp.gov.dm/index.php?option=com_content&amp;view=article&amp;id=16:contingency-emergency-response-component-cerc&amp;catid=15&amp;Itemid=181">http://dvrp.gov.dm/index.php?option=com_content&amp;view=article&amp;id=16:contingency-emergency-response-component-cerc&amp;catid=15&amp;Itemid=181</a>  |

## 20.3.8 Infrastructure and Energy

|   |  |
|---|--|
| Transport                                 |  |
| Overview                                  | Inland transportation is mainly by car. There are two international airports, but no domestic air routes are planned between them.   |
| Leadership governance                     | Ministry of Infrastructure, Ports, Energy and Labor  |
| Major development partners                | No information   |
| Energy and electricity                    |  |
| Overview                                  | 99% of primary energy is imported petroleum and petroleum products (2019). 99% of electricity is generated from diesel and the rest from renewable energy (wind and solar).  |
| Carbon neutral national plan              | Saint Lucia National Energy Transition Strategy and Integrated Resource Plan (2017) Target: Reduce CO <sub>2</sub> emissions in the energy sector by 7% by 2030 (NDC, 2021), and reduce power generation by 35% by 2020. |
| Leadership governance and utility company | Ministry of Infrastructure, Ports, Energy and Labor<br>St. Lucia Electricity Services Limited (LUCELEC)  |
| Major development partners                | JICA / UNDP / GIZ  |

Source: JICA Study Team with reference to various websites of the government organization and international organization (WB / IEA / IRENA / US DOE).

## 20.3.9 Tourism

Of the 23 countries surveyed, Saint Lucia has the largest impact of COVID-19 on the proportion of tourism employment in total employment.

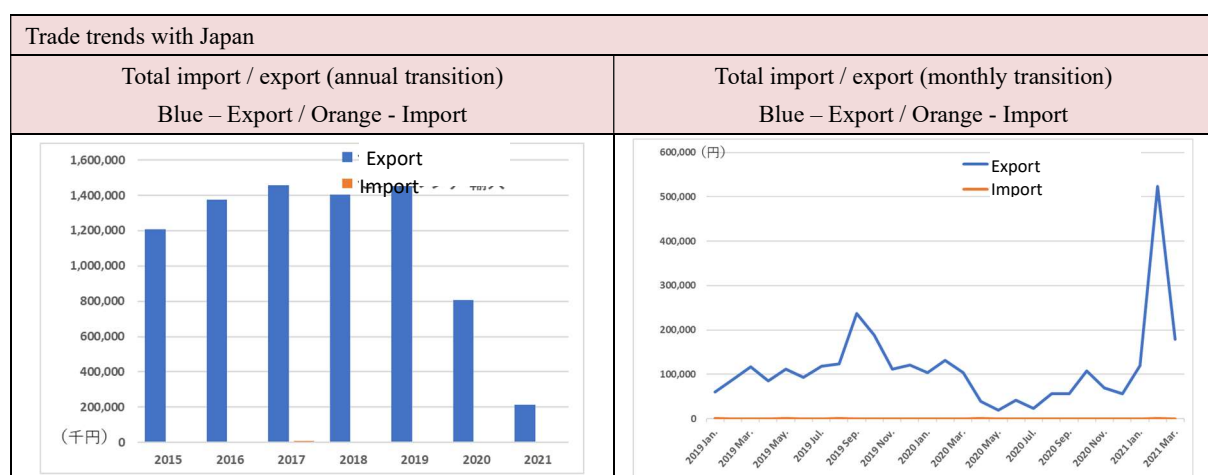
|   |  |   |
|---|--|---|
| Number of international tourist arrivals (2019) |  | 424,000   |
| International Tourism Receipts (2019)           |  | USD 999 million   |
| Tourism Competitiveness Ranking (2019)          |  | N / A   |
| Tourism Dependency Index (2019)                 |  | 53.4 (7th out of 166 countries)   |
| Government of Japan policy                      | Number of JICA projects in the last 10 years   | none  |
|   | References to the Country Assistance Policy  | Yes ("Development of fishery in collaboration with tourism")  |
|   | Interest in pilot projects   | N / A   |
| Tourism industry vulnerability                  | Contribution of Travel & Tourism to GDP (2019)   | 40.7% (3rd out of 23 countries)   |
|   | Contribution of Travel & Tourism to employment (2019)  | 78.1% (2nd out of 23 countries)   |
|   | Ratio of international spending (2019)   | 93% (3rd out of 23 countries)   |
|   | Top 3 countries of origin of visitors (2019)   | USA (45.24%)<br>UK (18.94%)<br>Canada (9.65%)   |
| Importance of tourism                           | Ratio of the budget amount of tourism-related ministries to the national budget amount (2019)            | 3.2% (3rd out of 16 countries)<br>National budget: XCD 1,591,589,000<br>Budget of tourism-related ministries: XCD 51,383,800  |
|   | Whether or not it is mentioned as a priority sector in the National Economic and Social Development Plan | Yes<br>Plan name: Medium Term Development Strategy 2020-2023<br>Reference example: To increase tourism arrivals and receipts (p. 11) as one of the Key Result Area Overarching Goals. |
|   | Existence of effective national tourism policies / strategies / plans                                    | none  |

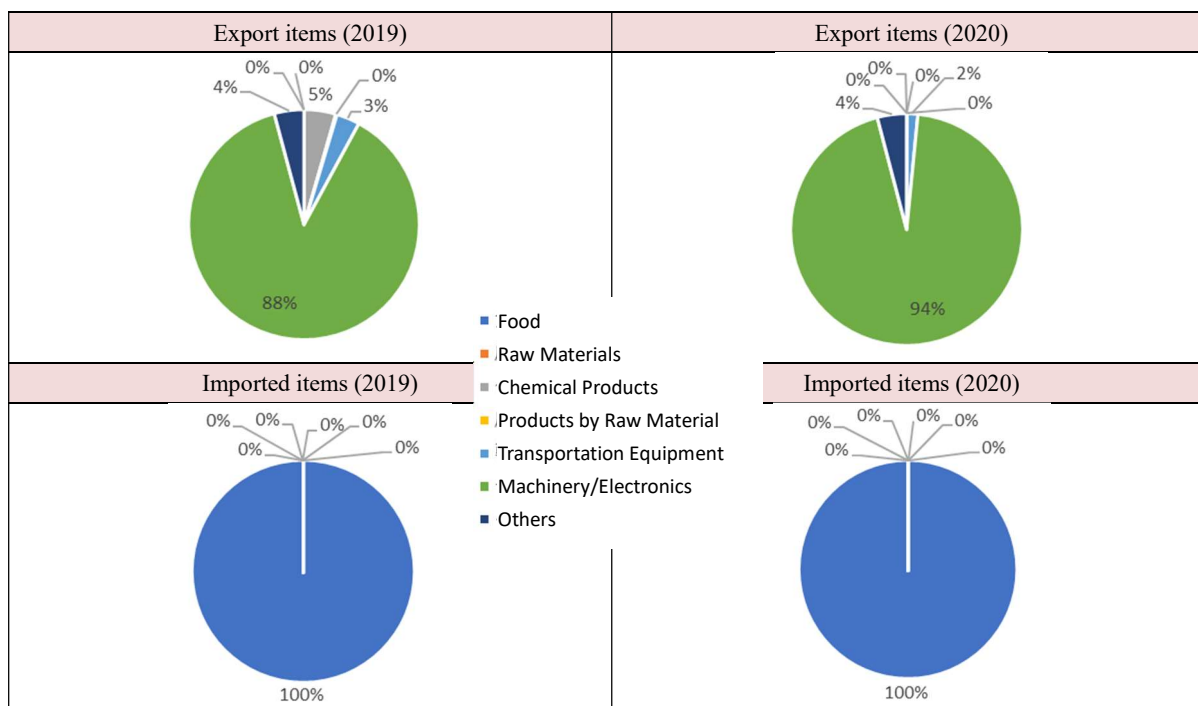
|  |   |                                  |
|--|---|----------------------------------|
| Impact of COVID-19   | Changes in the contribution of Travel & Tourism to GDP (2019 → 2020)        | -71.7% (2nd out of 23 countries) |
|  | Changes in the contribution of Travel & Tourism to employment (2019 → 2020) | -34.3% (1st out of 23 countries) |
| Number of government support measures for the tourism sector |   | N / A                            |

Source: Survey Team

## 20.3.10 Public-private partnership

|  | item   | Contents    |
|--|--|-------------|
| No. of JICA Public-Private Partnership Projects (After 2012)                 | Cooperation preparatory survey (overseas investment and financing) (former PPP infrastructure project)           | 0 cases     |
|  | Overseas investment and loan   | 0 cases     |
|  | SME Partnership Promotion Survey (support for Small-sized Enterprise)  | 0 cases     |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for small- and medium- sized enterprise) | 0 cases     |
|  | SDGs Business Verification Survey with Private Sector (support for small- and medium- sized enterprise)          | 0 cases     |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for large enterprise)                    | 0 cases     |
|  | SDGs Business Verification Survey with Private Sector (support for large enterprise)                             | 0 cases     |
| Total number of Japanese private companies entering the market (2019 survey) | Total number of business locations   | 0 companies |
|  | Overseas branches of Japanese companies,   | 0 companies |
|  | Local corporations wholly owned by Japanese companies and their branches   | 0 companies |
|  | Branch offices wholly owned by Japanese companies and their branches   | 0 companies |
|  | joint ventures (local corporations in which Japanese companies have a direct or indirect stake of 10% or more)   | 0 companies |
|  | joint ventures (Branch offices in which Japanese companies have a direct or indirect stake of 10% or more)       | 0 companies |
|  | companies established overseas by Japanese nationals (in which Japanese nationals have a stake of 10% or more)   | 0 companies |
| Unknown classification   | 0 companies  |             |
| Number of Japanese residents (2020 survey)                                   | Total  | 25 people   |
|  | Long-term residents  | 23 people   |
|  | Permanent resident   | 2 people    |
| Business Environment   | Doing Business 2020 Rank   | 93rd place  |
| PPP Project  | Existence of PPP law scheme  | ○           |
|  | PPP project with Japanese companies  | 0 cases     |





**Gathering information about the PPP system**

| Nº       | Task Item   | Inquiries/comments/status<br>Title of submitted file  | Source/URL  |
|----------|---|---|---|
| <b>1</b> | <b>PRIORITY 4_PPP Sector</b>  |   |   |
| 1.1      | PPP Projects in selective countries<br>PPP rules and regulations in Central America and Caribbean Countries |   | All below can be useful   |
| A        | PPP laws and Regulations<br>if there is any, when, and how  | There is no document on the government platform, only news from the government.   | <a href="http://www.govt.lc/news/government-approves-public-private-partnership-ppp-policy-framework#:~:text=In%20March%202015%2C%20the%20Government.Policy%20framework%20for%20Saint%20Lucia.&amp;text=PPPs%20can%20help%20increase%20the,risk%20involved%20in%20providing%20them">http://www.govt.lc/news/government-approves-public-private-partnership-ppp-policy-framework#:~:text=In%20March%202015%2C%20the%20Government.Policy%20framework%20for%20Saint%20Lucia.&amp;text=PPPs%20can%20help%20increase%20the,risk%20involved%20in%20providing%20them</a> |
| B        | PPP Unit Organization<br>if there is any, how structured  | There is no public information on the subject.  |   |
| C        | PPP sectors<br>in what sectors are the PPPs allowed   | There is no public information on the subject. But with the data available can say that there are allowed:<br>- ICT<br>- Energy<br>- Water and sewerage             | <a href="https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true">https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true</a>                               |
| D        | Proposal Types (Solicited or Unsolicited)<br>unsolicited  | The PPP Proposal Types with the data available shows that there were no unsolicited proposals   | <a href="https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true">https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true</a>                               |
| E        | PPP Forms<br>BOT,BTO,DB,,,what form are allowed   | The PPP forms with data available:<br>- MC (Management contract)<br>- P (Partial)   | <a href="https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true">https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true</a>                               |
| F        | PPP types<br>Availability payment, service purchase   | There is no public information on the subject.  |   |
| G        | PPP Project Trends<br>how much PPP projects in the last 10 years  | 3 (2010 to 2020)<br>- Guyana Telephone and Telegraph Company (1991)<br>- Guyana Power & Light (GLP) (1999)<br>- Guyana Water Company (2002)                         | <a href="https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CU&amp;header=true">https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CU&amp;header=true</a>   |
| H        | Participation of Japanese firms in PPP Projects<br>if any (check news source)                               | No information found  |   |
| I        | Any notable points for each country<br>if any   | Pagina donde se encuentra la ley, sin embargo no se encuentra activa<br><a href="http://www.st.lc/electricity-services-ltd">St. Lucia Electricity Services Ltd.</a> | <a href="http://opm.govt.lc/news/government-approves-public-private-partnership-ppp-policy-framework">http://opm.govt.lc/news/government-approves-public-private-partnership-ppp-policy-framework</a><br><a href="http://nurc.org.lc/resource-centre/market-structure/#1506111103527-1eb70284-556c">http://nurc.org.lc/resource-centre/market-structure/#1506111103527-1eb70284-556c</a>  |

Source: Survey Team



## 21. Saint Vincent and the Grenadines

### 21.1 Country overview (basic information)

#### 21.1.1 Basic information

Saint Vincent and the Grenadines (English: Saint Vincent and the Grenadines), commonly known as Saint Vincent and the Grenadines, is located in the small Antilles of the Caribbean Sea and is a constitutional monarchy consisting of the volcanic islands of St. Vincent and the Grenadines of coral reefs. The capital is Kingstown. It is a member of the Commonwealth of Nations and one of the Commonwealth Kingdoms. Saint Lucia to the north, Barbados to the east, and Grenada to the southwest. Saint Vincent and the Grenadines are members of the Americas Bolivar Alliance (ALBA) and have approved the Republic of China (Taiwan). Tourism and banana production are the economic centers. Saint Vincent is also the world's largest producer of Arrowroot. The fishing industry is also thriving, and in the Grenadines, a small number of islanders are catching whales in the name of indigenous whaling. Since it is a resort town in the United States, it has a large tourism income (\$ 74 million) and supplements the trade deficit with foreign investment and foreign aid.

#### 21.1.2 General circumstances

|             |   |                 |   |
|-------------|---|-----------------|---|
| 1 area      | 390 square kilometers (almost the same as Fukue Island in the Goto Islands) | 2 Population    | 110 thousand people (2019 World Bank)   |
| 3 Capital   | Kingstown   | 4 ethnic groups | African (72.8%), mixed race (20%), European (4%), Kalinago (3.6%), East Indian (1.4%), etc. |
| 5 languages | English (official language), St. Vincent Creole                             | 6 religion      | Christianity (Church of England, Protestantism, Catholicism, etc.)                          |

Source: Ministry of Foreign Affairs HP St. Vincent and the Grenadines Basic Data

#### 21.1.3 Economic overview

|                          |  |                              |  |
|--------------------------|--|------------------------------|--|
| 1 Major industry         | Tourism, agriculture (banana industry)   | 2 GNI<br>3 GNI / person      | US \$ 818.79 million (World Bank 2019)<br>US \$ 12,910 (2019, WDI) |
| 4 Economic growth rate   | 0.34% (2019 World Bank)  | 5 Unemployment rate          | 18.8% (2019) (ILO)   |
| 6 Price increase rate    | 2.32% (2018), 1.38% (2019 estimate) (IMF)  |                              |  |
| 7 Total trade amount     | Export: US \$ 50 million (2018 WTO)<br>Import: US \$ 340 million (2018 WTO)  |                              |  |
| 8 Major trade items      | Export: Agricultural products (banana, taro), scrap powder, metals<br>Import: Minerals / fuels, transportation machinery, foodstuffs, general machinery  |                              |  |
| 9 Major trading partners | Exports: Dominica, Barbados, Antigua and Barbuda, Saint Lucia<br>Imports: USA, Trinidad and Tobago, EU, China (2018, WTO)  |                              |  |
| 10 currencies            | Eastern Caribbean Dollar (EC \$)   | 11 Foreign currency reserves | na   |
| 12 National budget       | USD275,119,282 (2019)  | 13 External debt balance     | na   |
| 14 Economic overview     | The economy of St. Vincent is centered on the tourism industry, which has been rapidly developed since the mid-1980s, in addition to agriculture centered on traditional bananas. It is a small island country and has the vulnerability of being greatly affected by external factors such as the Western economy and natural disasters. Diversification of agricultural products and tourism even after the banana industry, which is a traditional product of the country, has fallen sharply due to the abolition of tariffs on Caribbean bananas by the EU, price fluctuations in the international market, and natural disasters such as hurricanes. It has achieved relatively stable economic growth through the promotion of industry. However, the economy has been sluggish due to the terrorist attacks on the United States in 2001 and the decline in the tourism industry affected by the global economic downturn since 2008. The St. Vincent government has aimed to improve the economic growth and unemployment rate in the medium term by attracting investment, but due to the economic damage caused by multiple natural disasters and the delay in the development of tourism infrastructure, 2017 The economic growth rate was sluggish. On the other hand, Argyle International Airport, which is a major government project that started construction in 2008, was completed in February 2017, and the economic growth rate in 2018 is due to the growth of the tourism industry due to the increase in the number of direct flights from hotels and Europe and the United States. Recorded 2% (World Bank). |                              |  |

Source: Ministry of Foreign Affairs HP St. Vincent and the Grenadines Basic Data



## 21.1.4 Country-specific development cooperation policy

### (1) Government of Japan Development Cooperation Policy by Country

**Table 21-1 Overview of Japan's ODA to St. Vincent and the Grenadines**

|  |  |
|--|--|
| <b>1. 1. Overview</b>  |  |
| Japan's economic cooperation for St. Vincent began with the acceptance of trainees in 1984, the Grant-in-Aid for Fisheries in 1987, the dispatch of experts in 1990, and the Grant-in-Aid for Grassroots Human Security in 1998. .. In 2000, a Japan Overseas Cooperation Volunteers (JOCV) dispatch arrangement was signed, and JOCV has been dispatched since 2003. Japan is currently implementing technical cooperation and grant-in-aid for aid in the fields of disaster prevention / environment and fisheries as one of the major donor countries.   |  |
| <b>2. 2. Aim of development cooperation</b>  |  |
| There are many island nations in the Caribbean region where the members of the Caribbean Community (Calicom) including St. Vincent are located, and natural disasters such as hurricanes, earthquakes, and tsunamis occur frequently, and the sustainable use of marine biological resources is promoted. It has something in common with Japan in terms of promotion. In addition to being vulnerable to climate change and natural disasters, Calicom member countries are based on industries that have a small population and economy and are susceptible to external factors such as agriculture, fisheries, and tourism. All 14 countries are included in the list of small island developing states published by the United Nations Secretariat. In order to overcome the vulnerabilities peculiar to small island developing states in the Calicom countries, it is necessary to cooperate by utilizing Japan's technology and knowledge in addition to deepening bilateral relations and socio-economics of each country. It is important from the viewpoint of financial stability and sustainable growth of the entire region.      |  |
| <b>3. 3. Basic policy</b>  |  |
| In the Development Cooperation Charter, even if the per capita income is at a certain level, for countries with special vulnerabilities such as small island developing states, necessary cooperation will be provided according to the actual development needs and burden capacity of each country. For the Caribbean Community (Calicom) member countries, the first is based on the Japan-Calicom Joint Ministerial Statement adopted at the 4th Japan-Calicom Foreign Ministers' Meeting held in November 2014. In order to "cooperate for sustainable development including overcoming vulnerabilities peculiar to small island developing states", we will develop cooperation that makes use of Japan's technology and knowledge. In accordance with these policies, St. Vincent will support the overcoming of vulnerabilities peculiar to small island developing states by supporting environmentally friendly sustainable social development and disaster prevention efforts. We also reaffirmed that we will cooperate in accordance with this policy at the 5th Japan-Calicom Foreign Ministers' Meeting held in September 2016. |  |
| <b>4. Priority areas</b>   |  |
| (1) Disaster prevention / environment: While strengthening the ability to respond to frequent hurricanes and natural disasters such as floods, small island developing states in the fields of climate change countermeasures, conversion to renewable energy, promotion of energy conservation, waste management, etc. Provide the support necessary to overcome the vulnerabilities peculiar to developing countries. Also pay attention to sharing knowledge with other Calicom member countries.   |  |
| (2) Fisheries: In line with Japan's shared goal of sustainable use of marine biological resources, we will continue to cooperate for the sustainable development and management of the fishery industry for industrial diversification.  |  |

Source: Ministry of Foreign Affairs HP St. Vincent and the Grenadines Country Data Collection 2017

**Table 21-2 National Development Cooperation Policy for St. Vincent and the Grenadines (September 2016)**

|   |   |
|---|---|
| <b>3. 3. Priority field (medium goal)</b> |   |
| (1) Disaster prevention / environment     | We are frequently hit by natural disasters such as hurricanes and floods, and we will provide support in the fields of disaster prevention and climate change countermeasures, which are urgent issues. Cooperate to promote the introduction of renewable energy and energy conservation.  |
| (2) Fisheries                             | It is said that St. Vincent has abundant undeveloped and unused fishery resources, and the government is focusing on promoting the fishery industry as an alternative to the banana industry, which lacks international competitiveness. We will continue to cooperate for the sustainable development and management of the country's fishery industry.  |
| (3) Others                                | (1) Waste management is particularly important for small island nations whose main industry is the tourism industry, and the 3Rs (reduce waste generation, reuse resources and products, and recycle. ) And appropriate disposal site management are issues.<br>(2) It should be noted that the government's education, health, and support for the vulnerable are issues due to the high poverty rate due to the decline of the banana industry, which absorbs a large working population. |

Source: Survey Team

### (2) Survey on COVID-19 by development partners

We extracted sector names and specific quantitative figures that have a large impact on the

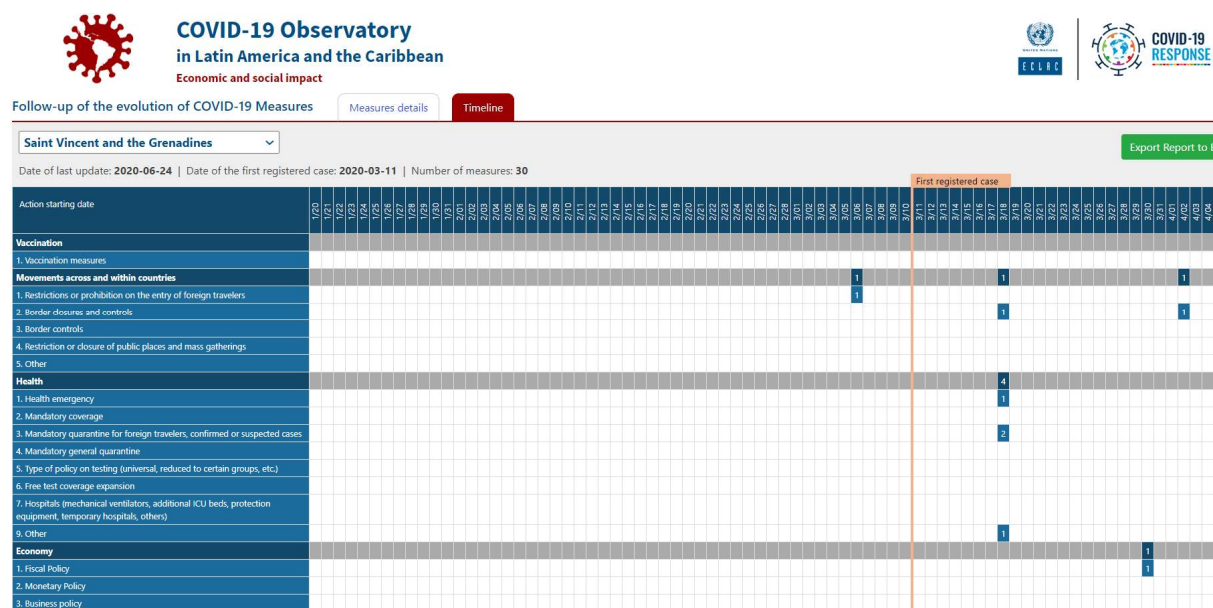
country-specific analysis described in various reports of development partners. Reports from the World Bank, OECD, BCIE, SICA, and the Ministry of Economy, Trade and Industry of Japan suggest the importance of introducing digitalization and innovation (Fintech, Aggrotech, Autotech, etc.), and incorporate the survey results of these development partners. I arranged it accordingly.

World Bank: "Growth and Revitalization" 2021 Semi-Annual Economic Report (March 2021)

- ✓ OECD: COVID-19 in LAC, Regional socio-economic implications and policy priorities (December 2020)
- ✓ BCIE: Impacto Económico del COVID-19 (April 2020)
- ✓ SICA: Estimación del Impacto Económico del COVID-19 en Centroamérica y República Dominicana (April 2020)
- ✓ Ministry of Economy, Trade and Industry of Japan: "Economic and Industrial Policy Based on the Impact of the New Corona Virus" (June 2020), Accelerating Digitization and Onlineization, Gig Economy, Innovation in the Transition to a New Everyday Life 1) Medical care / health, 2) Digital: Infrastructure development premised on the arrival of a digital society, 3) Green: Response to climate change problems, Energy security, 4) Emphasizes resilience.

### 21.1.5 Policies for COVID-19 measures taken by governments of each country

Various policies for COVID-19 taken by the government are described on the ECLAC homepage "COVID-19 Observatory" by country, time series, and field, and can be analyzed.



Source: <https://cepalstat-prod.cepal.org/forms/covid-countrysheet/index.html?table=2&country=VCT>

In this survey, the 16 policies in St. Vincent and the Grenadines listed on this website were categorized by sector as much as possible.

#### 1) Infection spread and alleviation of aggravation and death

No material was available.

#### 2) Support for affected industries and people

**Table 21-3 Support for Affected Industries and People (Saint Vincent and the Grenadines)**

| Various government policies (COVID-19 Observatory for LAC) |    |  |  |
|--|----|--|--|
| Socioeconomic policy                                       | 5  |  |  |
| Health care & nutrition                                    | 4  |  |  |
| Education  | 1  |  |  |
| Agriculture & rural development                            | 0  |  |  |
| Private sector   | 4  |  |  |
| Environment & disaster prevention                          | 0  |  |  |
| Governance and social security                             | 1  |  |  |
| DX and innovation  | 0  |  |  |
| Infrastructure & energy                                    | 1  |  |  |
| Tourism  | 0  |  |  |
| PPP  | 0  |  |  |
| Others (b)   | 0  |  |  |
| total  | 16 |  |  |

Source: Survey Team

### 3) Arrangement of various policies for COVID-19 taken by the government

COVID-19 Observatory for Latin America and Caribbean (ECLAC) organized by governments

**Table 21-4 Government-directed COVID-19 Policy Categories (St. Vincent and the Grenadines)**

#### Follow-up of the evolution of COVID-19 Measures

| Vaccination   | Economy  | Social protection   |
|---|--|---|
| 1. Vaccination measures   | 1. Fiscal Policy   | 1. Cash transfers (new transfers, increase in existing transfers, expansion of cash transfers to new recipients, early disbursement of transfers) |
| <b>Movements across and within countries</b>  | 2. Monetary Policy   | 2. Food transfers / In-kind transfers   |
| 1. Restrictions or prohibition on the entry of foreign travelers  | 3. Business policy   | 3. Guarantee of basic services  |
| 2. Border closures and controls   | 4. Restriction of economic activity (including shops and shopping centers)                             | <b>Education / schools</b>  |
| 3. Border controls  | 5. Price and quantity controls   | 1. Suspension of classes  |
| 4. Restriction or closure of public places and mass gatherings  | 6. Economic Stimulus (includes aggregate value of fiscal measures and separately of credit guarantees) | 2. Provision of tools for distance learning (online platforms, TV, radio, distance-learning materials)  |
| 5. Other  | 7. Regulation of the personal hygiene and cleaning products market                                     | 3. Maintenance of school feeding programme (indicating under which modalities)  |
| <b>Health</b>   | 8. Debt relief and suspension of credit payments (individuals, microentrepreneurs)                     | <b>Gender</b>   |
| 1. Health emergency   | 9. Other   | 1. Gender-based violence against women  |
| 2. Mandatory coverage   | <b>Labor</b>   | 2. Care economy   |
| 3. Mandatory quarantine for foreign travelers, confirmed or suspected cases                                   | 1. Labor Protection  | 3. Employment and income generation   |
| 4. Mandatory general quarantine   | 2. Elective work leave   | 4. Benefits, transfers and other social protection measures   |
| 5. Type of policy on testing (universal, reduced to certain groups, etc.)                                     | 3. Reduction of working hours  | 5. Women's participation in the digital era   |
| 6. Free test coverage expansion   | 4. Prohibition of dismissal from work  | 6. Other  |
| 7. Hospitals (mechanical ventilators, additional ICU beds, protection equipment, temporary hospitals, others) | 5. Other   |   |

Source: Survey Team

## 21.2 Macroeconomic analysis and selection of priority countries

### 21.2.1 Macroeconomic analysis

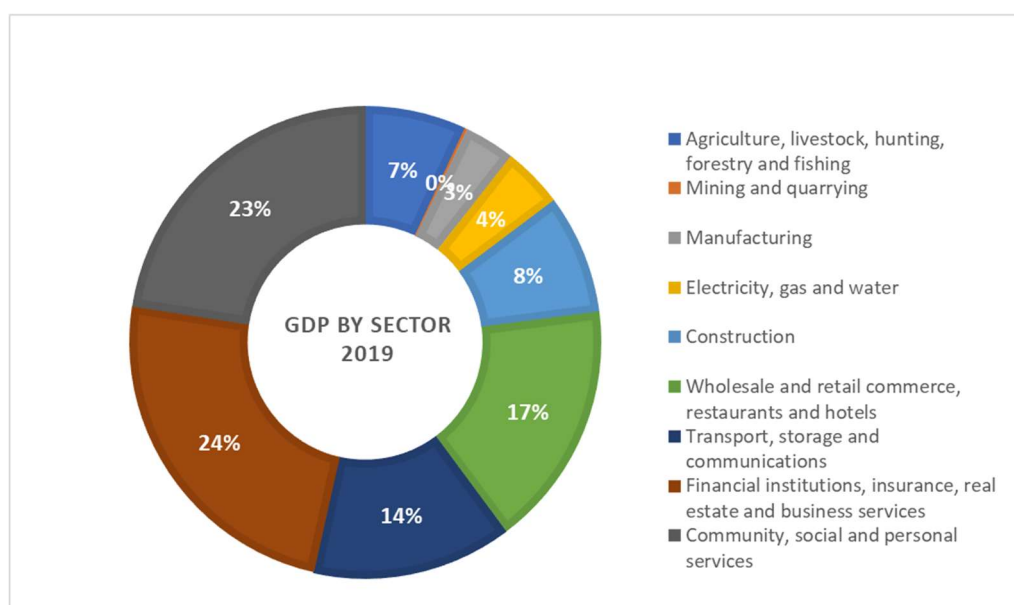
#### (1) Industrial composition

**Table 21-5 Industrial Composition (Saint Vincent and the Grenadines)**

Table: GDP by sector (En millones de dólares del Caribe Oriental a precios constantes de 2006)

|  | 2011  | 2012  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019a/ | 2020 b/ |
|--|-------|-------|-------|-------|-------|-------|-------|-------|--------|---------|
| Agriculture, livestock, hunting, forestry and fishing                | 88    | 89    | 94    | 97    | 93    | 99    | 104   | 107   | 106    | 95      |
| Mining and quarrying   | 3     | 2     | 2     | 3     | 3     | 3     | 3     | 3     | 3      | 3       |
| Manufacturing  | 64    | 61    | 59    | 62    | 63    | 61    | 62    | 67    | 53     | 48      |
| Electricity, gas and water   | 56    | 59    | 58    | 58    | 60    | 62    | 62    | 62    | 64     | 64      |
| Construction   | 120   | 116   | 123   | 109   | 119   | 118   | 125   | 128   | 125    | 123     |
| Wholesale and retail commerce, restaurants and hotels                | 245   | 252   | 258   | 258   | 252   | 255   | 249   | 264   | 258    | 235     |
| Transport, storage and communications                                | 210   | 210   | 209   | 208   | 204   | 202   | 195   | 197   | 210    | 196     |
| Financial institutions, insurance, real estate and business services | 329   | 331   | 337   | 342   | 347   | 351   | 359   | 360   | 366    | 364     |
| Community, social and personal services                              | 291   | 306   | 318   | 325   | 332   | 334   | 337   | 338   | 345    | 357     |
| Total  | 1,407 | 1,425 | 1,458 | 1,462 | 1,474 | 1,486 | 1,496 | 1,525 | 1,530  | 1,485   |

Source: ECLAC



Source: Survey Team

## (2) Trends in major economic indicators

**Table 21-6 Trends in Major Economic Indicator (Saint Vincent and the Grenadines)**

Table 1 ST VICENT AND THE GRENADINES: MAIN ECONOMIC INDICATORS (Annual growth rates)

|  | 2011   | 2012   | 2013   | 2014   | 2015   | 2016   | 2017   | 2018   | 2019a/ | 2020 b/ |
|--|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------|
| Gross domestic product (Annual growth rates c/)                                      | -0.4   | 1.4    | 1.8    | 1.2    | 1.3    | 1.9    | 1.0    | 2.2    | 0.5    | -5.5    |
| Per capita gross domestic product (Annual growth rates c/)                           | -0.5   | 1.3    | 1.7    | 1.0    | 1.1    | 1.6    | 0.7    | 1.8    | 0.2    | -5.8    |
| Gross domestic product, by sector (Annual growth rates c/)                           |        |        |        |        |        |        |        |        |        |         |
| Agriculture, livestock, hunting, forestry and fishing                                | -0.2   | 1.0    | 6.0    | 2.8    | -3.5   | 6.5    | 4.5    | 2.8    | -1.2   | -10.4%  |
| Mining and quarrying   | -24.7  | -24.5  | -11.0  | 62.6   | -7.3   | 1.3    | 1.0    | 2.2    | -5.0   | 0.0%    |
| Manufacturing  | 4.9    | -4.3   | -4.0   | 6.0    | 1.9    | -3.2   | 1.6    | 6.9    | -10.0  | -9.4%   |
| Electricity, gas and water   | -2.2   | 4.9    | -0.4   | -1.1   | 3.3    | 3.6    | 0.4    | -0.2   | 3.1    | 0.0%    |
| Construction   | -3.4   | -3.5   | 6.6    | -11.7  | 8.7    | -0.8   | 6.3    | 2.5    | -5.0   | -1.6%   |
| Wholesale and retail commerce, restaurants and hotels                                | -3.8   | 2.9    | 2.5    | 0.0    | -2.3   | 1.1    | -2.5   | 6.0    | 0.2    | -8.9%   |
| Transport, storage and communications  | 0.3    | -0.2   | -0.7   | -0.1   | -1.9   | -1.0   | -3.5   | 1.0    | 1.9    | -6.7%   |
| Financial institutions, insurance, real estate and business services                 | 1.3    | 0.5    | 1.7    | 1.5    | 1.5    | 1.4    | 2.1    | 0.4    | 1.3    | -0.5%   |
| Community, social and personal services  | 4.0    | 5.1    | 3.9    | 2.2    | 2.4    | 0.6    | 0.8    | 0.3    | 2.3    | 3.5%    |
| Balance of Payments (Millions of dollars)  |        |        |        |        |        |        |        |        |        |         |
| Current account balance  | -198.9 | -190.9 | -222.8 | -190.3 | -115.8 | -107.5 | -91.9  | -97.3  | -108.2 | -108.0  |
| Goods balance  | -248.9 | -266.3 | -272.1 | -270.0 | -248.5 | -252.1 | -246.5 | -264.3 | -292.5 |         |
| Exports, f.o.b.  | 43.4   | 47.8   | 54.5   | 49.6   | 46.3   | 43.0   | 44.4   | 47.5   | 41.4   |         |
| Imports, f.o.b.  | 292.3  | 314.0  | 326.5  | 319.6  | 294.8  | 295.1  | 290.9  | 311.8  | 333.9  |         |
| Services trade balance   | 55.0   | 55.5   | 35.6   | 77.1   | 115.8  | 112.3  | 117.8  | 127.2  | 147.8  |         |
| Income balance   | -12.9  | -3.8   | 0.1    | -29.9  | -18.2  | -5.2   | -3.6   | -1.5   | -8.4   |         |
| Net current transfers  | 7.9    | 23.6   | 13.6   | 32.4   | 35.1   | 37.5   | 40.4   | 41.4   | 44.9   |         |
| Capital and financial balance (Millions of dollars)                                  |        |        |        |        |        |        |        |        |        |         |
| Net foreign direct investment d/   | 85.6   | 115.1  | 159.6  | 119.3  | 115.8  | 88.8   | 142.5  | 34.0   | 96.5   |         |
| Other capital movements d/   | 90.3   | 96.8   | 87.2   | 93.4   | 15.4   | 38.6   | -60.9  | 50.8   | 22.8   |         |
| Foreign remittance from abroad for 2019 and 2020                                     | 163.0  | 208.1  | 246.8  | 182.8  | 113.0  | 122.3  | 78.0   | 83.3   | 110.9  |         |
| Microfinance dispatched and the sectors that received microfinance for 2019 and 2020 |        |        |        |        |        |        |        |        |        |         |

Source: Economic Survey of Latin America and the Caribbean 2020: Main conditioning factors of fiscal and monetary policies in the post-COVID-19 era

### 21.2.2 Impact analysis and identification of key sectors

#### (1) Impact assessment results for each sector by AHP analytic hierarchy process based on economic indicators

**Table 21-7 Results of Sector Impact Analysis by COVID-19 (St. Vincent and the Grenadines)**

| ECLAC category   | Changes around COVID-19 | Trends before COVID-19 | Total GDP ratio of the sector | comprehensive evaluation |   |
|--|-------------------------|------------------------|-------------------------------|--------------------------|---|
| Importance (weight)  | 0.4590                  | 0.0660                 | 0.0750                        |                          |   |
| Agriculture, livestock, hunting, forestry and fishing                | 9                       | 8                      | 4                             | 0.108                    | 1 |
| Mining and quarrying   | 3                       | 1                      | 1                             | 0.033                    | 9 |
| Manufacturing  | 8                       | 4                      | 2                             | 0.089                    | 2 |
| Electricity, gas and water   | 3                       | 6                      | 3                             | 0.044                    | 7 |
| Construction   | 5                       | 3                      | 5                             | 0.063                    | 6 |
| Wholesale and retail commerce, restaurants and hotels                | 7                       | 5                      | 7                             | 0.0888                   | 3 |
| Transport, storage and communications                                | 6                       | 2                      | 6                             | 0.073                    | 4 |
| Financial institutions, insurance, real estate and business services | 4                       | 7                      | 9                             | 0.065                    | 5 |
| Community, social and personal services                              | 1                       | 9                      | 8                             | 0.037                    | 8 |

Source: Survey Team

#### 1) ECLAC Sector Classification Amendments to the Sector Classification

In line with the method described in the main volume, the Sector Classification is divided into the Vertical Sector and the Cross-Cutting Sector, the ECLAC classification sector is allocated to the Vertical Sector Classification, and the evaluation of various policies related to COVID-19 taken by the government along with the results of the partner survey and the indicators of the national development

cooperation policy, the ranking of priority sectors are calculated using the four indicators, which are described in the table below.

**Table 21-8 Ranking of Priority Sectors (Saint Vincent and the Grenadines)**

|                                   | Economic Indicator Analysis | Government Policy on COVID-19 | Survey on COVID-19 by Development Partners | Country Development Cooperation Policy | Base Case |   | Priority |
|-----------------------------------|-----------------------------|-------------------------------|--|--|-----------|---|----------|
| Importance (weight)               | 0.6000                      | 0.2000                        | 0.1000                                     | 0.1000                                 |           |   |          |
| Social and Economic Policy        | 0.0000                      | 0.0625                        | 0.0000                                     | 0.0000                                 | 0.0625    |   | ○        |
| Health and Nutrition              | 0.0280                      | 0.0500                        | 0.0000                                     | 0.0000                                 | 0.0780    | 5 |          |
| Education                         | 0.0207                      | 0.0125                        | 0.0000                                     | 0.0000                                 | 0.0332    | 6 |          |
| Agriculture and Rural Development | 0.1326                      | 0.0000                        | 0.0125                                     | 0.0286                                 | 0.1737    | 3 | ○        |
| Manufacturing                     | 0.1736                      | 0.0500                        | 0.0125                                     | 0.0143                                 | 0.2504    | 1 | ○        |
| Environment/ Disaster Management  | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0286                                 | 0.0286    |   | ○        |
| Governance and Security           | 0.0000                      | 0.0125                        | 0.0000                                     | 0.0000                                 | 0.0125    |   | ○        |
| DX Innovation                     | 0.0000                      | 0.0000                        | 0.0375                                     | 0.0000                                 | 0.0375    |   | ○        |
| Infrastructure and Every          | 0.1804                      | 0.0125                        | 0.0125                                     | 0.0143                                 | 0.2196    | 2 | ○        |
| Tourism                           | 0.0647                      | 0.0000                        | 0.0250                                     | 0.0143                                 | 0.1040    | 4 |          |
| Public-Private Partnership        | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0000                                 | 0.0000    |   | ○        |

Source: Survey Team

## (2) Sensitivity analysis

### 1) Analysis case settings

Based on the above methodology, the following case settings were made.

**Table 21-9 Sensitivity Analysis Case-based Weighting Settings (St. Vincent and the Grenadines)**

|  | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|--|-----------|------------------------|------------------------|------------------------|
| Economic indicator analysis  | 0.6       | 0.6                    | 0.5                    | 0.5                    |
| Investigation and arrangement of various policies for COVID-19 taken by the government | 0.2       | 0.1                    | 0.1                    | 0.1                    |
| Development partner survey results   | 0.1       | 0.2                    | 0.2                    | 0.3                    |
| Country-specific development cooperation policy  | 0.1       | 0.1                    | 0.2                    | 0.1                    |

Source: Survey Team

### 2) Summary of sensitivity analysis

The results of each sensitivity analysis are as summarized below. Sensitivity analysis did not show much change, which was close to the result of the base case.

**Table 21-10 Summary of Sensitivity Analysis Results (Saint Vincent and the Grenadines)**

|                                   | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|-----------------------------------|-----------|------------------------|------------------------|------------------------|
| Social and economic policy        |           |                        |                        |                        |
| Health care / nutrition           | 5         | 5                      | 5                      | 5                      |
| education                         | 6         | 6                      | 6                      | 6                      |
| Agriculture / rural development   | 3         | 3                      | 3                      | 3                      |
| Manufacturing industry            | 1         | 1                      | 1                      | 1                      |
| Environment / disaster prevention |           |                        |                        |                        |
| Governance and citizen security   |           |                        |                        |                        |
| DX / Innovation                   |           |                        |                        |                        |
| Infrastructure and Energy         | 2         | 2                      | 2                      | 2                      |
| sightseeing                       | 4         | 4                      | 4                      | 4                      |
| Public-private partnership        |           |                        |                        |                        |

Source: Survey Team

### **(3) Selection of priority sectors by country**

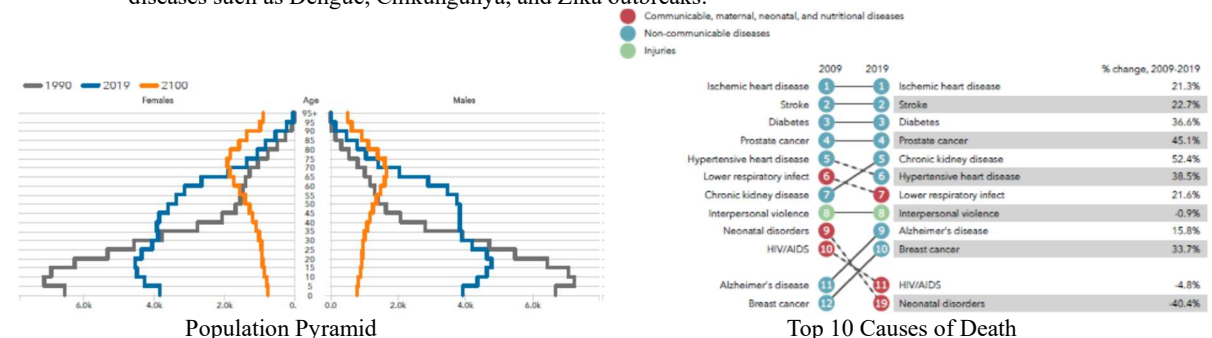
From the above results, 1) social / economic policy, 2) agriculture / rural development, 3) manufacturing industry, 4) environment / disaster prevention, 5) governance / citizen security, 6) DX / innovation, 7) infrastructure / energy, 8) public-private partnership are selected as priority sectors.



## 21.3 Country-specific information by sector

### 21.3.1 Health care / nutrition

Overview: Proportion of death from noncommunicable diseases is high. Burden of diabetes, ischemic health diseases, and disorder in neonatal period are high. Aging society. Constrictive population pyramid. Mosquito-borne infectious diseases such as Dengue, Chikungunya, and Zika outbreaks.



| Demography                                      |   | Urban population (%)                            |  | Urban population growth (%)           |                                   | Life Expectancy (years)          |  |      | Population ≥ 65 (%) |  |
|---|---|---|--|---------------------------------------|-----------------------------------|----------------------------------|--|------|---------------------|--|
| Population                                      | Urban population (%)                      | Urban population growth (%)                     | Male   | Female                                | Both                              |                                  |  |      |                     |  |
| 110,210   | 52.61                                     | 1.14  | 75.01  | 70.18                                 | 72.42                             |                                  |  | 9.59 |                     |  |
| Maternal, Newborn and Child Health              |   |   |  |                                       |                                   |                                  |  |      |                     |  |
| Total fertility rate                            | Neonatal mortality (per 1,000 livebirths) | Under 5mortality (per 1,000 livebirths)         | Maternal mortality (per 100,000 livebirths)    | Antenatal care ≥ 4 (%)                | Immunization (1yr)                |                                  |  |      |                     |  |
| 1.89  | 9.40                                      | 15.10   | 68   | 73                                    | DTP (%)                           | MCV1 (%)                         |  |      |                     |  |
|   |   |   |  |                                       | 97                                | 99                               |  |      |                     |  |
| Nutrition                                       |   |   | Health Finance                                 |                                       |                                   |                                  |  |      |                     |  |
| Under 5 Children                                | Adult overweight (%)                      | Current health expenditure per capita (USD PPP) |  | Current health expenditure to GDP (%) |                                   | Out-of-pocket expenditure (%)    |  |      |                     |  |
| Stunting (%)                                    | Overweight (%)                            | Male  | Female   |                                       |                                   |                                  |  |      |                     |  |
| -   | -   | 32  | 30   | 522                                   |                                   | 4.47                             |  | 31   |                     |  |
| Health Service Provision (per 1,000 population) |   |   | COVID-19 related Indicators as of January 2022 |                                       |                                   |                                  |  |      |                     |  |
| Hospital beds                                   | Doctors                                   | Nurses  | Total confirmed cases (per million)            | Total death (per million)             | Total number of tests (per 1,000) | People completed vaccination (%) |  |      |                     |  |
| 2.60  | 0.7                                       | 0.7   | 59,450.52                                      | 808.85                                | -                                 |                                  |  |      |                     |  |

Source: Graphs=Institute for Health Metrics and Evaluation, County Profile; Demography, Total fertility rate, Neonatal mortality, under-5 mortality, Health finance= World Development Indicators, the World Bank (Accessed on Aug 2021); Maternal mortality= UNICEF (Sep 2019); Antenatal care, Immunization, Nutrition, Health service provision,= OECD/The World Bank (2020), Health at a Glance: Latin America and the Caribbean 2020; COVID-19 related indicators= Our World in Data (Accessed on Jan 2022)

| Health                                  |  |
|---|--|
| Leadership/ Governance                  | Responsible Agency: Ministry of Health, Wellness and Environment (MOHWE), Inter-Ministerial Committee on Health<br><a href="http://www.health.gov.vc/health/">http://www.health.gov.vc/health/</a><br>Centralized<br>Major Relevant Policies: National Economic and Social Development Plan (NESDP), 2013-2025 |
| Service Providing System                | Public sector is the main provider. Patient required advanced treatment is referred to Barbados, Trinidad and Tobago, and the United States.   |
| Health Finance                          | Government fund/ National health insurance is under consideration.   |
| Human Resource for Health               | Nursing education is well established, but not enough post against the production. Then, statistically, doctors and nurses are not sufficient to the population.   |
| IT/ Digital Health                      | Around 70% of public institutions introduce common health information management system to share data among the facilities.  |
| Drugs/ Medical Equipment                | The government procure drugs and control the price, but frequent stock-out.  |
| Priority                                | Noncommunicable diseases prevention and control  |
| Communicable Disease Emergency Response | A half of IHR core capacities have been achieved. Capacity development of chemical and radiation emergency is left behind.   |
| Major Development Partners              | PAHO/WHO (SMART Hospital, etc.), EU (health sector modernization support), Global Fund, World Bank, PEPFAR, Taiwan, Venezuela, Cuba, etc.<br>Inter-Ministerial Committee on Health leads donor coordination.<br>The World Paediatric Project / Center of excellence and hub for paediatric care in the OECS    |
| Nutrition                               |  |
| Institutional Arrangement               | Ministry of Health, Wellness and Environment   |
| Major Relevant Policies                 | Food and Nutrition Security Plan of Action for St. Vincent & the Grenadines, 2009  |
| Human Resource for Health               | (No information)   |

Source: Survey Team with reference to WHO Country Cooperation Strategy for Saint Vincent and the Grenadines at a glance, May 2018, Institute for Health Metrics and Evaluation, County Profile, WHO, Global atlas of medical devices, 2017, and WHO, Nutrition Landscape Information System (NLIS)

## 21.3.2 Education

| Overview  |   |  |               |                 |                 |
|---|---|--|---------------|-----------------|-----------------|
| Number of children  | Education level   | Preschool  | primary       | Lower secondary | Upper secondary |
|   | 2018  | 3,655 people   | 13,198 people | 6,300 people    | 3,508 people    |
| Source: Institute for Statistics (UIS), UNESCO Bureau of Statistics |   |  |               |                 |                 |
| Government authority  | Ministry of Education   |  |               |                 |                 |
| Education indicator   | Net enrollment rate: primary education 97.2%, lower secondary 98.5%, upper secondary 84.9% (2018)<br>Primary education completion rate 105.5% (2018), out-of-school children rate 0.5% (2017), public education budget GDP ratio 5.7% (2018) Source: UIS  |  |               |                 |                 |
| Impact of COVID-19  |   |  |               |                 |                 |
| School closure / reopening  | From March 11, 2020 to February 2, 2021, 50 days of complete closure and 54 days of partial closure, 104 days in total. From February to June 2021, the remote style lessons, the vacation from July was extended, and from September, the hybrid style lessons are held.   |  |               |                 |                 |
| COVID-19 measures   | Implemented the strategy created by the Association of East Caribbean States as a measure against COVID-19. Providing electronic devices for teachers and students, psychosocial support, providing meals for disadvantaged students, activities to meet the psychosocial needs of teachers, creating videos explaining the current situation for special needs students, Elimination of digital divide   |  |               |                 |                 |
| Distance education  | Implementation status   | An online platform has been set up to conduct distance learning. No TV or radio broadcast.   |               |                 |                 |
|   | Access  | Internet access rate for educational purposes at school: 100% (UNESCO)   |               |                 |                 |
|   | Teacher training  | N / A  |               |                 |                 |
| School hygiene  | Infection control measures  | The safety guide for reopening schools was formulated with reference to the one created by UNICEF.   |               |                 |                 |
|   | Facility maintenance  | Approximately 100% (2019) of schools have basic water facilities, hand-washing facilities, and toilets. Source: World Bank / UNICEF Survey <a href="https://washdata.org/">https://washdata.org/</a> |               |                 |                 |
| School lunch / nutrition  | Breakfast and lunch provided to 3,000 students aged 5 to 6 (UNICEF)   |  |               |                 |                 |
| Countermeasures for vulnerable people                               | N / A   |  |               |                 |                 |
| Support for donors, etc.  | UNICEF: US \$ 3 million Grant Aid (Dominica, Grenada, St. Lucia, St. Vincent) COVID-19 Education policy and effective countermeasures in the disaster, distance education platform for vulnerable children, distribution of digital teaching materials, development of online instruction content for radio and TV education programs, collaboration with the private sector to improve access to primary and secondary education level learning platforms, teacher training for distance learning technology acquisition, hygiene infrastructure development in schools in vulnerable areas<br>GPE: Distribution of tablets to vulnerable children for COVID-19 countermeasures (GPE grant US \$ 70,000) |  |               |                 |                 |

Source: Survey Team

## 21.3.3 Agriculture / rural development

|  |  |        |        |        |        |        |
|--|--|--------|--------|--------|--------|--------|
| Urban / rural population ratio                   | 52.2% / 47.8% (FAOSTAT 2018)                                       |        |        |        |        |        |
| Agricultural land area                           | 7,000 ha (FAOSTAT 2019) 1)   |        |        |        |        |        |
| Agricultural sector employment                   | 10.1% of all employment (FAOSTAT 2019) 2)                          |        |        |        |        |        |
| Agricultural GDP                                 | 6.7% of total GDP (World Bank 2020)                                |        |        |        |        |        |
| Of the agricultural sector Value added amount    | \$ 48,025.15 thousand (including forestry) (World Bank 2020) 3)    |        |        |        |        |        |
| Of the agricultural sector Expenditure ratio     | Ratio of agricultural fiscal expenditure to national budget (%) 4) |        |        |        |        |        |
|  | 2018   | 2019   | 2020   |        |        |        |
|  | 2.19   | 2.00   | 2.52   |        |        |        |
| Of the agricultural sector Export-import balance | Trade Balance (USD1,000 FAOSTAT) 5)                                |        |        |        |        |        |
|  |  | 2015   | 2016   | 2017   | 2018   | 2019   |
|  | export   | 35,149 | 33,796 | 28,511 | 26,186 | 23,707 |
| Import   | 91,644   | 89,400 | 90,977 | 91,107 | 93,185 |        |

|   |   |         |         |         |         |         |
|---|---|---------|---------|---------|---------|---------|
|   | Balance of payments   | -56,495 | -55,604 | -62,466 | -64,921 | -69,478 |
| Agricultural development Policy / plan / strategy | <p>Agriculture is diversified for regional and international markets and is export driven. Major crops include bananas, root vegetables and yams, which have an impact on markets both inside and outside the region (FAO 2018) 6). Ruminants such as goats and fisheries also make important contributions (Simpson 2012) 7). However, in 2000, the Banana Preferential Trade Agreement (Lome Convention) ended (ITC 2004) 8), the spread of black sigatoka disease, and a series of meteorological phenomena over the past 15 years reduced production, and the economy of this sector as a whole. Is becoming less important.</p> <p>The SVG government has set strategic goals to improve the quality of life of all people and has formulated the National Economic and Social Development Plan 2013-20259). Agriculture is recognized as the center of the economy in this development plan, is essential to achieving national food and nutrition security and reducing hunger and poverty, and has important aspects in the potential for job creation. It is supposed to be.</p> <p>The strategic focus of agriculture is to increase the competitiveness and diversification of the sector, but topographical constraints with many mountainous areas inevitably limit large-scale agricultural practices. Therefore, it targets small-scale agriculture practiced on small-owned land, eliminates the threats faced by small-scale farmers, and makes appropriate investments in modern technology and agricultural research to increase profits and improve food security. It aims to improve, improve market access of agricultural products, sustainable use of land, forestry and marine resources, and improve the contribution of agriculture to the domestic economy.</p> <p>The Caribbean Agricultural Research and Development Institute (CARDI), which SVG is a member of, is an organization that conducts research and development aimed at improving the competitiveness and sustainability of the regional agricultural sector, and has a five-year roadmap, "Strategy." Plan 2018-202210) "has been created. This strategic program focuses on products identified as economically important to the CARICOM region, while maintaining consistency and coordination with each country's unique strategic plans and policies, regional strategies and policies, global strategies and policies. I'm guessing. CARDI divides the member countries into three groups from the aspect of strategic approach according to the economic structure of each country, and SVG belongs to the third group. This group is an OECS country and the R &amp; D department is very dependent on CARDI. Countries with a strong sense of crisis about food security are focused on the development of high value products and centralized and innovative systems.</p>  |         |         |         |         |         |
| Impact of COVID-19                                | <p>In an interview survey with agricultural extension workers conducted by the Caribbean Community (CARICOM) and FAO, 30% of extension workers said they had problems accessing seeds when it came to crop production (FAO 2021) 12). .. Relatedly, poor quality seed purchases (9%), reduced acreage (9%) and delayed sowing (4%) were reported. Livestock production has been reported in economic turmoil (14%), COVID-19-related restrictions / concerns (12%), pasture and water shortages (8%) and feed shortages (5%). A quarter of the extension workers also confirmed that livestock farmers are reducing the number of animals raised. For microfisheries, the main impacts reported by 20% of extension workers were difficulties in selling marine products (7%), restrictions / concerns related to COVID-19 (3%), and lower marine product prices (2%). , Decreased demand and difficulty in storing or storing fillet fish (1%). It was also reported that fishermen had difficulty accessing materials such as fishing gear, inputs, and services.</p> <p>In marketing, 63% of extension workers experienced problems with the sales channels of their products (crops, livestock, fisheries, etc.), and 31% said they could not secure alternative sales channels. The most affected agricultural sector stakeholders include rainwater farmers (22%), seasonal workers (9%), small micro-fishermen (7%), irrigated farmers (7%), and female head households. (6%) and market (6%).</p> <p>Considering the above-mentioned multifaceted impact of COVID-19 on SVG, the government has three areas: 1) strengthening the public health system, 2) reducing the economic burden caused by pandemics, and 3) introducing stimulus measures. We are implementing a multi-departmental package focusing on.</p>  |         |         |         |         |         |
| Source / reference                                | <p>1) FAOSTAT-Land, Input and Sustainability-Land Use-Area-Agriculture (<a href="https://www.fao.org/faostat/en/#data/RL">https://www.fao.org/faostat/en/#data/RL</a>)</p> <p>2) FAOSTAT- Share of employment in agriculture (% of total employment) &amp; Share of female employment in agriculture (% of employment in agriculture) (<a href="https://www.fao.org/faostat/en/#data/OE">https://www.fao.org/faostat/en/#data/OE</a>)</p> <p>3) Agriculture, forestry, and fishing, value added (constant 2015 US \$) --Latin America &amp; Caribbean (<a href="https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart">https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart</a>)</p> <p>4) FAOSTAT-Government Expenditure-Share of Total Expenditure-Central Government (<a href="https://www.fao.org/faostat/en/#data/IG">https://www.fao.org/faostat/en/#data/IG</a>)</p> <p>5) FAOSTAT-Trade-Crops and livestock products-Import / Export Value-Agricultural Products (<a href="https://www.fao.org/faostat/en/#data/TCL">https://www.fao.org/faostat/en/#data/TCL</a>)</p> <p>6) FAOSTAT-Production-Value of Agriculture Production-Gross Production Value (current thousand US \$) (<a href="https://www.fao.org/faostat/en/#data/QV">https://www.fao.org/faostat/en/#data/QV</a>)</p> <p>7) CARIBSAVE Climate Change Risk Profile for St. Vincent and the Grenadines (<a href="https://www.researchgate.net/publication/272791668_Climate_Change_Risk_Profile_for_Saint_Vincent_and_the_Grenadines">https://www.researchgate.net/publication/272791668_Climate_Change_Risk_Profile_for_Saint_Vincent_and_the_Grenadines</a>)</p> <p>8) ST. VINCENT &amp; THE GRENADINES --International Trade Center (<a href="https://www.intracen.org/WorkArea/DownloadAsset.aspx?id=52357">https://www.intracen.org/WorkArea/DownloadAsset.aspx?id=52357</a>)</p> <p>9) National Economic and Social Development Plan 2013-2025 of Saint Vincent and the Grenadines (<a href="http://www4.unfccc.int/submissions/INDC/Published%20Documents/Saint%20Vincent%20and%20Grenadines/1/SVG_INDC_Final.pdf">http://www4.unfccc.int/submissions/INDC/Published%20Documents/Saint%20Vincent%20and%20Grenadines/1/SVG_INDC_Final.pdf</a>)</p> <p>10) CARDI Strategic Plan 2018-2022 (<a href="http://www.cardi.org/wp-content/uploads/downloads/2018/05/CARDI-Strategic-Plan-2018-to-2022-Final.pdf">http://www.cardi.org/wp-content/uploads/downloads/2018/05/CARDI-Strategic-Plan-2018-to-2022-Final.pdf</a>)</p> <p>11) GDP growth (annual%) --St. Vincent and the Grenadines (<a href="https://data.worldbank.org/indicator/NY.GDP.MKTP.KD.ZG?locations=VC">https://data.worldbank.org/indicator/NY.GDP.MKTP.KD.ZG?locations=VC</a>)</p> <p>12) Resilient Recovery Rapid Readiness Support in St. Vincent and the Grenadines, 2021, GCF-FAO (<a href="https://www.greenclimate.fund/sites/default/files/document/resilient-recovery-rapid-readiness-support-st-vincent-and-grenadines.pdf">https://www.greenclimate.fund/sites/default/files/document/resilient-recovery-rapid-readiness-support-st-vincent-and-grenadines.pdf</a>)</p> |         |         |         |         |         |

### 21.3.4 Private sector

Saint Vincent and the Grenadines are a country with a small economy (22nd) but a medium GDP per capita (11th). The unemployment rate remains high, characterized by a low female unemployment rate and a high youth unemployment rate compared to the total unemployment rate.

|              | Index                      | Value  | Ranking                 | Year | Source             |
|--------------|----------------------------|--------|-------------------------|------|--------------------|
| Productivity | GDP per capita (USD)       | 7,298  | 11 (Among 22 countries) | 2020 | World Bank         |
|              | GDP per worker (USD)       | 29,276 | 11 (Among 18 countries) | 2019 | World Bank         |
| Employment   | Minimum wage (USD / month) | 296    | 11 (Among 23 countries) | 2019 | ILO                |
|              | Unemployment rate          | 18.88  | 20 (Among 22 countries) | 2019 | Statista           |
|              | Female unemployment rate   | 16.58  | 20 (Among 22 countries) | 2019 | The Global Economy |
|              | Youth unemployment rate    | 41.68  | 20 (Among 22 countries) | 2019 | Statista           |
|              | Underemployment rate       | ---    | — (Among 18 countries)  | ---  | ---                |
|              | Informal worker rate       | ---    | — (Among 12 countries)  | ---  | ---                |

Source: Described in the table



Source: World Bank, ILO, The Global Economy, etc.

### 21.3.5 Environment / disaster prevention

|             | item                            | data  | remarks    |
|-------------|---------------------------------|---|------------|
| environment | Environmental agency            | Ministry of Tourism, Civil Aviation, Sustainable Development and Culture    |            |
|             | Waste-related organizations     | Solid Waste Management Unit, under The Central Water and Sewerage Authority |            |
|             | Environmental Budget (USD)      | 2019:-<br>2020:-<br>2021:-<br>3-year average:-                              | not gotten |
|             | Environmental budget per capita | ---   | not gotten |

|                     |  |  |                         |
|---------------------|--|--|-------------------------|
|                     | (2019-2021 average, USD)                           |  |                         |
|                     | Budget ratio to national budget (2019)             | —————  | not gotten              |
|                     | Donor support status                               | 2 cases  | As of May 2021          |
|                     | Renewable energy power generation (GWh) (2019)     | 27   | IRENA, 2021             |
|                     | Geothermal power generation capacity (MWe)         | 2020: 0<br>2025 Forecast: 0<br>Potential: 10.00                      | WGC, 2020               |
| Disaster prevention | Disaster prevention organization                   | National Emergency Management Organization (NEMO)                    |                         |
|                     | Donor support status                               | 3 cases  | As of May 2021          |
|                     | Number of natural disasters (2010-2020)            | 4 cases<br>Major disasters: floods, droughts, volcanoes, earthquakes |                         |
|                     | Number of victims (persons) per 100,000 population | 38,466 people  | 2nd out of 23 countries |

Source: Survey Team

### 21.3.6 Governance and citizen security

| Item  | Overview   |           |         |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
|---|--|-----------|---------|----------------------------|----------------------------|--------------------------|-----------------------------|------|-----|------|-----|------|-----|--------------------------------|------|-----|------|-----|------|-----|---|-----------------------------|------|-----|------|-----|------|-----|--------------------------------|------|-----|------|-----|------|-----|--------------------------|-----------------------------|------|-----|------|-----|------|-----|--------------------------------|------|-----|------|-----|------|-----|--------------------|-----------------------------|------|-----|------|-----|------|-----|--------------------------------|------|-----|------|-----|------|-----|-------------|-----------------------------|------|-----|------|-----|------|-----|--------------------------------|------|-----|------|-----|------|-----|-----------------------|-----------------------------|------|-----|------|-----|------|-----|--------------------------------|------|-----|------|-----|------|-----|
| Political system                                      | Parliamentary democracy under the constitutional monarchy belonging to the Commonwealth of Nations   |           |         |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
| Election system                                       | The monarch is hereditary. The governor is appointed by the monarch. After the legislative elections, the head of the majority party was appointed prime minister by the governor.   |           |         |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
| Legislative system                                    | Unicameral parliament  |           |         |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
| Most recent / next legislative election               | November 5, 2020 (next time scheduled for 2025)  |           |         |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
| Appointment of judicial system / judge                | The President of the Eastern Caribbean Supreme Court is appointed by the Queen of England. Other judges are appointed by the Judicial and Legal Services Committee, an independent judicial body.  |           |         |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
| Political stability                                   | Stable   |           |         |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
| “Worldwide Governance Indicators”                     | <p>All indicators are higher than the Latin American average. However, looking at the changes over the past 10 years, the level of "government effectiveness" has deteriorated significantly in 2014, and the level of "regulatory quality" has also declined.</p> <table border="1"> <caption>Worldwide Governance Indicators Percentile Rank (0 to 100)</caption> <thead> <tr> <th>Indicator</th> <th>Country</th> <th>Year</th> <th>Percentile Rank (0 to 100)</th> </tr> </thead> <tbody> <tr> <td rowspan="6">Voice and Accountability</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~65</td> </tr> <tr> <td>2019</td> <td>~60</td> </tr> <tr> <td>2020</td> <td>~60</td> </tr> <tr> <td rowspan="3">St. Vincent and the Grenadines</td> <td>2010</td> <td>~85</td> </tr> <tr> <td>2019</td> <td>~80</td> </tr> <tr> <td>2020</td> <td>~80</td> </tr> <tr> <td rowspan="6">Political Stability and Absence of Violence/Terrorism</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">St. Vincent and the Grenadines</td> <td>2010</td> <td>~75</td> </tr> <tr> <td>2019</td> <td>~80</td> </tr> <tr> <td>2020</td> <td>~85</td> </tr> <tr> <td rowspan="6">Government Effectiveness</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~60</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~50</td> </tr> <tr> <td rowspan="3">St. Vincent and the Grenadines</td> <td>2010</td> <td>~75</td> </tr> <tr> <td>2019</td> <td>~65</td> </tr> <tr> <td>2020</td> <td>~60</td> </tr> <tr> <td rowspan="6">Regulatory Quality</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">St. Vincent and the Grenadines</td> <td>2010</td> <td>~70</td> </tr> <tr> <td>2019</td> <td>~65</td> </tr> <tr> <td>2020</td> <td>~65</td> </tr> <tr> <td rowspan="6">Rule of Law</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">St. Vincent and the Grenadines</td> <td>2010</td> <td>~75</td> </tr> <tr> <td>2019</td> <td>~70</td> </tr> <tr> <td>2020</td> <td>~70</td> </tr> <tr> <td rowspan="6">Control of Corruption</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~60</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">St. Vincent and the Grenadines</td> <td>2010</td> <td>~80</td> </tr> <tr> <td>2019</td> <td>~75</td> </tr> <tr> <td>2020</td> <td>~75</td> </tr> </tbody> </table> | Indicator | Country | Year                       | Percentile Rank (0 to 100) | Voice and Accountability | * Latin America & Caribbean | 2010 | ~65 | 2019 | ~60 | 2020 | ~60 | St. Vincent and the Grenadines | 2010 | ~85 | 2019 | ~80 | 2020 | ~80 | Political Stability and Absence of Violence/Terrorism | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | St. Vincent and the Grenadines | 2010 | ~75 | 2019 | ~80 | 2020 | ~85 | Government Effectiveness | * Latin America & Caribbean | 2010 | ~60 | 2019 | ~55 | 2020 | ~50 | St. Vincent and the Grenadines | 2010 | ~75 | 2019 | ~65 | 2020 | ~60 | Regulatory Quality | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | St. Vincent and the Grenadines | 2010 | ~70 | 2019 | ~65 | 2020 | ~65 | Rule of Law | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | St. Vincent and the Grenadines | 2010 | ~75 | 2019 | ~70 | 2020 | ~70 | Control of Corruption | * Latin America & Caribbean | 2010 | ~60 | 2019 | ~55 | 2020 | ~55 | St. Vincent and the Grenadines | 2010 | ~80 | 2019 | ~75 | 2020 | ~75 |
|   | Indicator  | Country   | Year    | Percentile Rank (0 to 100) |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
| Voice and Accountability                              | * Latin America & Caribbean  | 2010      | ~65     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
|   |  | 2019      | ~60     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
|   |  | 2020      | ~60     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
|   | St. Vincent and the Grenadines   | 2010      | ~85     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
|   |  | 2019      | ~80     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
|   |  | 2020      | ~80     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
| Political Stability and Absence of Violence/Terrorism | * Latin America & Caribbean  | 2010      | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
|   |  | 2019      | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
|   |  | 2020      | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
|   | St. Vincent and the Grenadines   | 2010      | ~75     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
|   |  | 2019      | ~80     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
|   |  | 2020      | ~85     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
| Government Effectiveness                              | * Latin America & Caribbean  | 2010      | ~60     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
|   |  | 2019      | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
|   |  | 2020      | ~50     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
|   | St. Vincent and the Grenadines   | 2010      | ~75     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
|   |  | 2019      | ~65     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
|   |  | 2020      | ~60     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
| Regulatory Quality                                    | * Latin America & Caribbean  | 2010      | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
|   |  | 2019      | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
|   |  | 2020      | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
|   | St. Vincent and the Grenadines   | 2010      | ~70     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
|   |  | 2019      | ~65     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
|   |  | 2020      | ~65     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
| Rule of Law   | * Latin America & Caribbean  | 2010      | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
|   |  | 2019      | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
|   |  | 2020      | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
|   | St. Vincent and the Grenadines   | 2010      | ~75     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
|   |  | 2019      | ~70     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
|   |  | 2020      | ~70     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
| Control of Corruption                                 | * Latin America & Caribbean  | 2010      | ~60     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
|   |  | 2019      | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
|   |  | 2020      | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
|   | St. Vincent and the Grenadines   | 2010      | ~80     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
|   |  | 2019      | ~75     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
|   |  | 2020      | ~75     |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |
| Global freedom status                                 | N / A  |           |         |                            |                            |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                                |      |     |      |     |      |     |



|                                   |   |
|-----------------------------------|---|
| Corruption Perception Index (CPI) | 40/180th place, 59/100 points (Transparency International 2020)   |
| E-government development index    | It is lower than the average level in the region, especially behind the development of communication infrastructure. In terms of human capital, it is slightly lower than the Latin American regional average but higher than the global level. |
| Rule of law                       | According to WGI, the level of "rule of law" is high and stable.  |
| Citizen security                  | The homicide rate is also higher than the Caribbean region average. The homicide rate in 2016 was extremely high at 36.5 / 100,000 (the average of 14.3 in the Caribbean and 6 in the world in the same year) (UNODC 2021).                     |

Source: Survey Team

### 21.3.7 DX / Innovation

|  |                                |   |
|--|--------------------------------|---|
| Basic indicators and statistics  | E-Government Ranking 1): 109th | Radar chart of e-government ranking<br> |
|  | Mobile connection index 2):-   |   |
|  | Network Infrastructure Index:- |   |
|  | Internet user rate 36.8        |   |
|  | Mobile connection rate 93.9    |   |
|  | Fixed broadband rate 20.3      |   |
| Rate of increase in the number of Internet users 4.3 (2021/2020)   |                                |   |
| <b>Communication network</b>   |                                |   |
| <p>Saint Vincent and the Grenadines (SVG) is one of the five countries that make up the Organization of Eastern Caribbean States (OECS) 3), the Organization of Eastern Caribbean States (ECTEL) 4). ECTEL was established with the aim of promoting market liberalization and competition in the region, and its activities are complemented within SVG by the National Telecommunications Regulatory Commission (NTRC) 5).</p> <p>In 2003, the telecommunications sector was completely liberalized by an agreement between the SVG government and three telecommunications companies (Kelcom International, Digicel (SVG) Limited and Cable &amp; Wireless) 6). Due to this liberalization, the mobile phone penetration rate7) rose sharply from 9.2% (2002) to 58.1% (2003).</p> <p>In addition, all three companies provide the latest high-speed Internet connection services throughout the island, and SVG's fixed broadband penetration rate of 8) 22.1% (2020) is consistently higher than the regional average of 15.7% (2020) in Latin America and the region. Has maintained growth.</p> <p>However, the brand name Karib Cable (Kelcom International), which provides cable TV, high-speed Internet, and telephone services, was acquired by Barbados-based Columbus in 20139), and in 2016, the brand name FLOW of Columbus. It became owned by C &amp; W, which took over 10), and the current telecommunications market is in a dominated state.</p> <p>Digicel launched the first domestic 4G LTE network commercially in 2018 11). In the same year, Flow (formerly brand name LIME: C &amp; W) announced that it has upgraded its core HFC broadband network to a cable access platform (CCPA) 12) that uses the Arris E6000 Converged Edge Router (CER) 12). As a result, the maximum speed will reach 100 Mbps.</p> |                                |   |
| <b>National Strategy for Digital Transformation</b>  |                                |   |
| <p>The National Economic and Social Development Plan (NESDP) 2013-202513), which was formulated with the aim of achieving sustainable and high economic growth, stipulates plans for the development of information and communication technology (ICT). Implementation targets include creating an environment where all citizens can access ICT, actively introducing it into education systems, expanding e-government services, utilizing it in the medical sector, and supporting capacity development for small and medium-sized enterprises.</p> <p>The National ICT Strategy and Action Plan 2010-201514) focuses on creating strategic impetus, strengthening national development and competitiveness through many ICT initiatives. The initiative can be broadly divided into four categories: 1) effective regulatory services, 2) skilled human resources development, 3) e-government, and 4) business development. Strategies and action plans are evaluated and improved annually by the responsible ministry, the Ministry of Telecommunications Science and Technology (MTSTI) (now integrated within the Ministry of Finance and Economic Planning15)) and the National ICT Ministers Management Advisory Forum (NIMSAF). It is designed to be upgraded to a new ICT initiative as needed.</p> <p>The SGV government continues to implement the Caribbean DX Project 16) with a World Bank loan (28 USD million). The project builds foundational items such as digital infrastructure, digital platforms, digital financial services, digital skills, digital entrepreneurship and innovation to enable a dynamic and secure digital economy through a comprehensive ecosystem approach. It is an object.</p>   |                                |   |
| <b>Characteristic efforts</b>  |                                |   |
| <p>In the practice of climate smart agriculture17) supported by the Inter-American Institute of Agricultural Cooperation (IICA), SVG aims to develop technologies, policies and investment conditions to achieve sustainable agricultural development as food security under climate change. Approach is underway. A special fund project is being implemented by IICA to mitigate the serious impact of COVID-19 on the agricultural sector 18). The initiative not only contributes to material support including seeds, fertilizers, pesticides, etc., but also contributes to national and regional COVID-19 compliance programs such as the development and dissemination of ICT communication tools led by the Ministry of Agriculture and Agriculture. ... Within the community provided by this communication service, technical advice and useful information on</p>  |                                |   |

|   |   |
|---|---|
| agricultural materials are readily available to farmers or farmers. |   |
| source  |   |
| 36.   | E-Gov-Index: a composite indicator that consists of three indexes (Online Service Index, Telecommunication Infrastructure Index and Human Capital Index), which are equally weighted. It ranges from 0 to 1, with 1 being the most developed.   |
| 37.   | Mobile Connectivity Index: an input index developed by GSMA to measure the performance against the four key enablers of mobile internet adoption – infrastructure, affordability, consumer readiness and content. ( <a href="https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2016/06/Mobile-Connectivity-Launch-Report.pdf">https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2016/06/Mobile-Connectivity-Launch-Report.pdf</a> )   |
| 38.   | Organization of Eastern Caribbean States<br><a href="https://www.oecs.org/en/who-we-are/about-us">https://www.oecs.org/en/who-we-are/about-us</a>   |
| 39.   | Eastern Caribbean Telecommunications Authority<br><a href="https://www.ectel.int/about-ectel/">https://www.ectel.int/about-ectel/</a>   |
| 40.   | National Telecommunications Regulatory Commission<br><a href="https://www.ntrc.vc/general/about-us/">https://www.ntrc.vc/general/about-us/</a><br>NATIONAL REPORT ST. VINCENT AND THE GRENADINES<br><a href="https://sustainabledevelopment.un.org/content/documents/1134247SVG%20Rio+20%20Final%20Report.pdf">https://sustainabledevelopment.un.org/content/documents/1134247SVG%20Rio+20%20Final%20Report.pdf</a>   |
| 41.   | Mobile cellular subscriptions (per 100 people)-Latin America & Caribbean, St. Vincent and the Grenadines<br><a href="https://data.worldbank.org/indicator/IT.CEL.SETS.P2?locations=ZJ-VC">https://data.worldbank.org/indicator/IT.CEL.SETS.P2?locations=ZJ-VC</a>   |
| 42.   | Fixed broadband subscriptions (per 100 people) --Latin America & Caribbean, St. Vincent and the Grenadines<br><a href="https://data.worldbank.org/indicator/IT.NET.BBND.P2?locations=ZJ-VC">https://data.worldbank.org/indicator/IT.NET.BBND.P2?locations=ZJ-VC</a>   |
| 43.   | Go with the Flow: Karib Cable bought by Columbus<br><a href="https://www.commsupdate.com/articles/2013/03/05/go-with-the-flow-karib-cable-bought-by-columbus/">https://www.commsupdate.com/articles/2013/03/05/go-with-the-flow-karib-cable-bought-by-columbus/</a>   |
| 44.   | LIME SVG goes with the Flow<br><a href="https://www.commsupdate.com/articles/2016/04/12/lime-svg-goes-with-the-flow/">https://www.commsupdate.com/articles/2016/04/12/lime-svg-goes-with-the-flow/</a>  |
| 45.   | Digicel lights up SVG's first LTE network<br><a href="https://www.commsupdate.com/articles/2018/12/18/digicel-lights-up-svgs-first-lte-network/">https://www.commsupdate.com/articles/2018/12/18/digicel-lights-up-svgs-first-lte-network/</a>  |
| 46.   | E6000   E6000 Converged Edge Router<br><a href="https://ja.commscope.com/product-type/broadband-access-network-systems/cmts-ccap/ccap/e6000/">https://ja.commscope.com/product-type/broadband-access-network-systems/cmts-ccap/ccap/e6000/</a>  |
| 47.   | National Economic and Social Development Plan 2013-2025 of Saint Vincent and the Grenadines<br><a href="http://observatorioplanificacion.cepal.org/sites/default/files/plan/files/SanVicentevlasgranadinascompleto.pdf">http://observatorioplanificacion.cepal.org/sites/default/files/plan/files/SanVicentevlasgranadinascompleto.pdf</a>  |
| 48.   | National ICT Strategy and Action Plan 2010-2015 <a href="https://www.gov.vc/images/PoliciesActsAndBills/SVGICTStrategyAndActionPlanFinal.pdf">https://www.gov.vc/images/PoliciesActsAndBills/SVGICTStrategyAndActionPlanFinal.pdf</a>   |
| 49.   | Ministry of Finance, Economic Planning and Information Technology<br><a href="http://www.finance.gov.vc/finance/">http://www.finance.gov.vc/finance/</a>  |
| 50.   | Caribbean Digital Transformation Project<br><a href="https://documents1.worldbank.org/curated/en/848701593136915061/pdf/Dominica-Grenada-St-Lucia-St-Vincent-and-the-Grenadines-and-the-Organization-of-Eastern-Caribbean-States-Caribbean-Digital-Transformation-Project-Digital-Caribbean.pdf">https://documents1.worldbank.org/curated/en/848701593136915061/pdf/Dominica-Grenada-St-Lucia-St-Vincent-and-the-Grenadines-and-the-Organization-of-Eastern-Caribbean-States-Caribbean-Digital-Transformation-Project-Digital-Caribbean.pdf</a> |
| 51.   | Climate Smart Agriculture in St. Vincent and the Grenadines: A Brain-Stormed Organic Approach to Agriculture<br><a href="https://repositorio.iica.int/bitstream/handle/11324/16180/BVE21058024i.pdf?sequence=1&amp;isAllowed=y">https://repositorio.iica.int/bitstream/handle/11324/16180/BVE21058024i.pdf?sequence=1&amp;isAllowed=y</a>   |
| 52.   | <a href="http://scm.oas.org/pdfs/2021/CP44465TSTVINCENTGRENADINES.pdf">http://scm.oas.org/pdfs/2021/CP44465TSTVINCENTGRENADINES.pdf</a>   |

### 21.3.8 Infrastructure and Energy

|   |  |
|---|--|
| Transport                                 |  |
| Overview                                  | Inland transportation is mainly by car. There are several airports that connect the islands.   |
| Leadership governance                     | Ministry of Transport Works, Urban Development and Local Government  |
| Major development partners                | No information   |
| Energy and electricity                    |  |
| Overview                                  | 96% of primary energy is imported petroleum and petroleum products (2018). Eighty-one percent of electricity comes from diesel and the rest from renewable energy (18% hydro, 1% solar). |
| Carbon neutral national plan              | No information<br>Goal: Reduce GHG emissions by 22% by 2025 (NDC, 2016)  |
| Leadership governance and utility company | Ministry of National Security, Air and Sea Port Development<br>St. Vincent Electricity Services (VINLEC)   |
| Major development partners                | GIZ  |

Source: JICA Study Team with reference to various websites of the government organization and international organization (WB / IEA / IRENA / US DOE).

### 21.3.9 Tourism

Consists of a small volcanic island, the main island, and more than 30 islands

|   |   |                                 |
|---|---|---------------------------------|
| Number of international tourist arrivals (2019) | 85,000  |                                 |
| International Tourism Receipts (2019)           | USD 118 million                                       |                                 |
| Tourism Competitiveness Ranking (2019)          | N / A   |                                 |
| Tourism Dependency Index (2019)                 | 35.9 (19th out of 166 countries)                      |                                 |
| Government of Japan policy                      | Number of JICA projects in the last 10 years          | none                            |
|   | References to the Country Assistance Policy           | none                            |
|   | Interest in pilot projects                            | N / A                           |
| Tourism industry vulnerability                  | Contribution of Travel & Tourism to GDP (2019)        | 28.6% (9th out of 23 countries) |
|   | Contribution of Travel & Tourism to employment (2019) | 45.2% (5th out of 23 countries) |



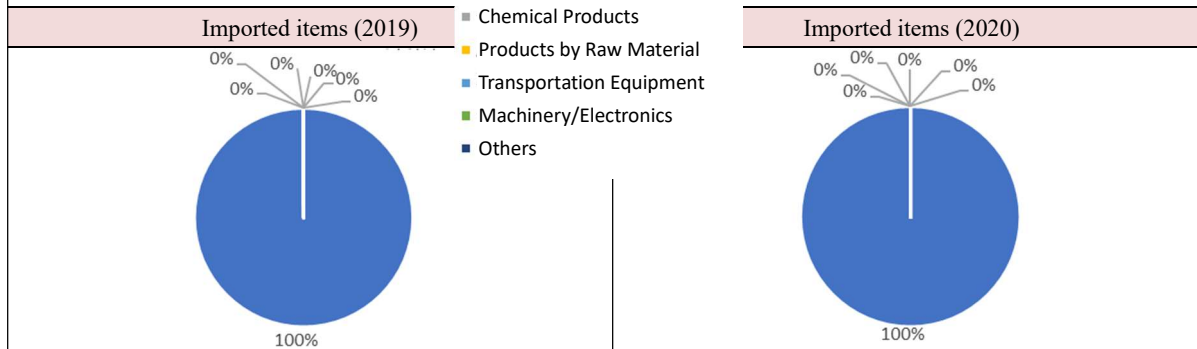
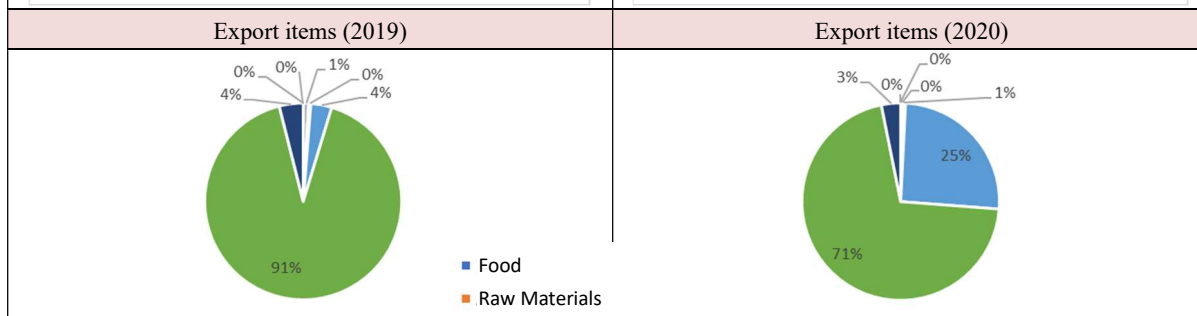
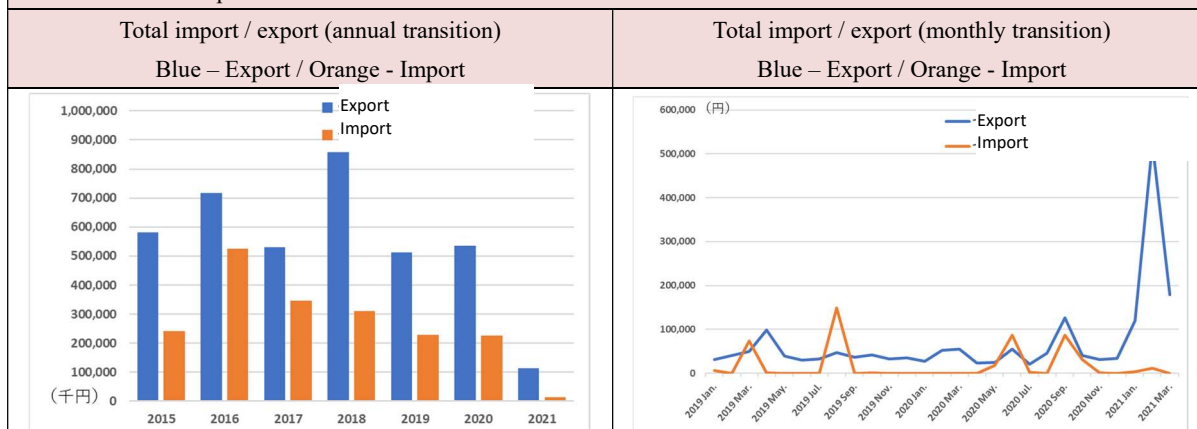
|  |  |  |
|--|--|--|
|  | Ratio of international spending(2019)  | 92% (5th out of 23 countries)  |
|  | Top 2 countries of origin of visitors (2019)   | USA (34.35%)<br>Canada (11.86%)  |
| Importance of tourism  | Ratio of the budget amount of tourism-related ministries to the national budget amount (2019)            | 3.2% (3rd out of 16 countries)<br>National budget: XCD 743,565,627<br>Budget of tourism-related ministries: XCD 23,547,344   |
|  | Whether or not it is mentioned as a priority sector in the National Economic and Social Development Plan | Yes<br>Plan name: National Economic and Social Development Plan 2013-2025<br>Reference example: Goal One: As one of Re-engineering Economic Growth 1.3 To stimulate growth in the tourism sector (p. 55) |
|  | Existence of effective national tourism policies / strategies / plans                                    | none   |
| Impact of COVID-19   | Changes in the contribution of Travel & Tourism to GDP (2019 → 2020)                                     | -67.0% (5th out of 23 countries)   |
|  | Changes in the contribution of Travel & Tourism to employment (2019 → 2020)                              | -27.8% (9th out of 23 countries)   |
| Number of government support measures for the tourism sector |  | N / A  |

Source: Survey Team

### 21.3.10 Public-private partnership

|  | item   | Contents    |
|--|--|-------------|
| No. of JICA Public-Private Partnership Projects (After 2012)                 | Cooperation preparatory survey (overseas investment and financing) (former PPP infrastructure project)           | 0 cases     |
|  | Overseas investment and loan   | 0 cases     |
|  | SME Partnership Promotion Survey (support for Small-sized Enterprise)  | 0 cases     |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for small- and medium- sized enterprise) | 0 cases     |
|  | SDGs Business Verification Survey with Private Sector (support for small- and medium- sized enterprise)          | 0 cases     |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for large enterprise)                    | 0 cases     |
|  | SDGs Business Verification Survey with Private Sector (support for large enterprise)                             | 0 cases     |
| Total number of Japanese private companies entering the market (2019 survey) | Total number of business locations   | 0 companies |
|  | Overseas branches of Japanese companies,   | 0 companies |
|  | Local corporations wholly owned by Japanese companies and their branches   | 0 companies |
|  | Branch offices wholly owned by Japanese companies and their branches   | 0 companies |
|  | joint ventures (local corporations in which Japanese companies have a direct or indirect stake of 10% or more)   | 0 companies |
|  | joint ventures (Branch offices in which Japanese companies have a direct or indirect stake of 10% or more)       | 0 companies |
|  | companies established overseas by Japanese nationals (in which Japanese nationals have a stake of 10% or more)   | 0 companies |
| Unknown classification   | 0 companies  |             |
| Number of Japanese residents (2020 survey)                                   | Total  | 5 people    |
|  | Long-term residents  | 4 people    |
|  | Permanent resident   | 1 person    |
| Business Environment   | Doing Business 2020 Rank   | 130th place |
| PPP Project  | Existence of PPP law scheme  | ×           |
|  | PPP project with Japanese companies  | 0 cases     |

Trade trends with Japan



Gathering information about the PPP system

| N°  | Task Item   | Inquiries/comments/status<br>Title of submitted file           | Source/URL  |
|-----|---|--|---|
| 1   | <b>PRIORITY 4_PPP Sector</b>  |  |   |
| 1.1 | PPP Projects in selective countries<br>PPP rules and regulations in Central America and Caribbean Countries |  | All below can be useful   |
| A   | PPP laws and Regulations<br>if there is any, when, and how  | There is no PPP Law  | <a href="https://pppknowledgehub.org/countries/saint-vincent-and-grenadines">https://pppknowledgehub.org/countries/saint-vincent-and-grenadines</a>                     |
| B   | PPP Unit Organization<br>if there is any, how structured  | There is no PPP Unit Organization                              | <a href="https://pppknowledgehub.org/countries/saint-vincent-and-grenadines">https://pppknowledgehub.org/countries/saint-vincent-and-grenadines</a>                     |
| C   | PPP sectors<br>in what sectors are the PPPs allowed   | There is only information about the Energy Sector              | <a href="https://ppi.worldbank.org/en/snapshots/country/st-vincent-and-the-grenadines">https://ppi.worldbank.org/en/snapshots/country/st-vincent-and-the-grenadines</a> |
| D   | Proposal Types (Solicited or Unsolicited)<br>unsolicited  | There is only information about 1 project and it was Solicited | <a href="https://ppi.worldbank.org/en/snapshots/country/st-vincent-and-the-grenadines">https://ppi.worldbank.org/en/snapshots/country/st-vincent-and-the-grenadines</a> |
| E   | PPP Forms<br>BOT, BTO, DB, etc., what form are allowed  | The PPP Form of the Project is BOO                             | <a href="https://ppi.worldbank.org/en/snapshots/country/st-vincent-and-the-grenadines">https://ppi.worldbank.org/en/snapshots/country/st-vincent-and-the-grenadines</a> |
| F   | PPP types<br>Availability payment, service purchase   | -  |   |
| G   | PPP Project Trends<br>how much PPP projects in the last 10 years  | 1<br>- St. Vincent Geothermal Power Plant (2019)               | <a href="https://ppi.worldbank.org/en/snapshots/country/st-vincent-and-the-grenadines">https://ppi.worldbank.org/en/snapshots/country/st-vincent-and-the-grenadines</a> |
| H   | Participation of Japanese firms in PPP Projects<br>if any (check news source)                               | -  |   |
| I   | Any notable points for each country<br>if any   |  |   |

Source: Survey Team

## 22. Suriname

### 22.1 Country overview (basic information)

#### 22.1.1 Basic information

Republic of Suriname (Dutch: Republiek Suriname), commonly known as Suriname, is a republican nation located in the northeastern part of South America. It borders French Guiana to the east, Guyana to the west, and Brazil to the south, and faces the Caribbean Sea and the Atlantic Ocean to the north. The capital is Paramaribo. Suriname, formerly known as Dutch Guiana, is also the only Dutch-speaking country in the Americas. In the south, there is a mountainous area connected to the Guiana Highlands, and it is the smallest independent country in South America in terms of area and population. The country name comes from the indigenous Sulinen people. The Giana region was settled by British and Dutch in the 17th century and used black slaves to grow tobacco. After exchanging Sulinum with the Netherlands, the Dutch occupation was several times after that, but the Dutch sovereignty was confirmed thereafter. The Dutch used black slaves to grow coffee, cocoa, sugar cane and cotton, but the slaves were poorly treated and many slaves escaped from the plantation. To make up for the labor shortage, we accepted contract workers from southern China, then from India, and then from the Dutch East Indies (now Indonesia) to create a new labor force. In the meantime, a small number of immigrants have been introduced from the Middle East. Due to this history, Suriname has become one of the most diverse ethnic and cultural countries in the world. He gained autonomy from the Netherlands in 1954 and became completely independent on November 25, 1975. Suriname is blessed with abundant bauxite and timber resources, and its economy is heavily dependent on bauxite, accounting for 15% of GDP and 70% of exports. Agriculture includes sugar, rice, bananas and citrus fruits, and fishery exports shrimp to Europe and Japan. In recent years, petroleum resources and gold are also expected. A quarter of the population is engaged in the agricultural sector.

#### 22.1.2 General circumstances

|             |  |                 |   |
|-------------|--|-----------------|---|
| 1 area      | 163,820 square kilometers (about half of Japan)  | 2 Population    | 581,000 people (2019 World Bank)  |
| 3 Capital   | Paramaribo                                       | 4 ethnic groups | Hindu (27.4%), Maroon (21.7%), Creole (15.7%), Java (13.7%), Mixed Race (13.4%), etc. |
| 5 languages | Dutch (official language), English, Sranan, etc. | 6 religion      | Christianity (Protestant, Catholic, etc.), Hinduism, Islam, etc.                      |

Source: Ministry of Foreign Affairs HP Suriname Republic Basic Data

#### 22.1.3 Economic overview

|                          |   |                              |   |
|--------------------------|---|------------------------------|---|
| 1 Major industry         | Mining (gold, oil)<br>Agriculture (rice, banana)  | 2 GNI<br>3 GNI / person      | \$ 3.22 billion (World Bank 2019)<br>\$ 5,540 (World Bank 2019) |
| 4 Economic growth rate   | -0.8% (2019 World Bank)   | 5 Unemployment rate          | 7.3% (2019) (World Bank (Source ILO))                           |
| 6 Price increase rate    | 22% (2017 estimate), 6.9% (2018 estimate), 4.4% (2019 estimate) (IMF)   |                              |   |
| 7 Total trade amount     | Exports: US \$ 2.2 billion (goods only) (2019 WTO)<br>Imports: US \$ 1.8 billion (goods only) (2019 WTO)  |                              |   |
| 8 Major trade items      | Exports: gold, crude oil, wood, rice, alcoholic beverages<br>Imports: Petroleum, machinery parts, cotton, capital and consumer goods  |                              |   |
| 9 Major trading partners | Exports: United Arab Emirates, EU, Brazil, Switzerland, China (2019, WTO)<br>Imports: US, EU, China, Trinidad and Tobago, Antigua and Barbuda   |                              |   |
| 10 currencies            | Surinamese dollar (SRD)   | 11 Foreign currency reserves | na  |
| 12 National budget       | na  | 13 External debt balance     | na  |
| 14 Economic overview     | (1) Mining products centered on gold account for more than 50% of the total exports, and also export agricultural products such as shrimp, rice and bananas. Most of the capital and consumer goods depend on imports.<br>(2) In 2009, the economy slowed down due to a decrease in investment and sluggish exports due to falling prices, and the momentum of growth recovered again after 2010, but since 2014 due to the decline in crude oil and resource prices. The economic situation in Japan is deteriorating, and it is |                              |   |

|  |   |
|--|---|
|  | <p>expected that the difficult situation will continue in the future.</p> <p>(3) The development of bauxite mines and new oil fields is being promoted through alliances with state-owned oil companies and Western companies, and future development is desired.</p> <p>(4) In June 2014, the 1st Suriname Mine, Energy and Oil International Conference (SURIMEP2014) was held for governments and business people.</p> <p>(5) Suriname is in an economic crisis caused by a significant deterioration in the terms of trade, which has been exacerbated by inadequate fiscal buffers and policy responses. In addition to the economic downturn from 2013 to 2016, in connection with the general elections held in 2015, salaries of civil servants, social security expenses and part of public works projects equivalent to 1.1% of GDP Spending far exceeded economic growth, such as an increase.</p> <p>(6) The economic situation has deteriorated due to the decline in crude oil and resource prices since the latter half of 2014. Inflation rate of over 60% was recorded in 2016 as a result of the value of Surinamese dollar against the US dollar halving and linked with soaring utility bills. In 2020, the central bank announced that it would devalue the Surinamese dollar to the US dollar from 7.4 Surinamese dollars to 14 Surinamese dollars.</p> |
|--|---|

Source: Ministry of Foreign Affairs HP Suriname Republic Basic Data

## 22.1.4 Country-specific development cooperation policy

### (1) Government of Japan Development Cooperation Policy by Country

**Table 22-1 Overview of Japan's ODA to Suriname**

|   |  |
|---|--|
| 1. 1. Overview  |  |
| Japan's economic cooperation with Suriname began with the Grant-in-Aid for Fisheries in 1975, followed by technical cooperation, and in 2001, the Grant-in-Aid for Grassroots Human Security. Japan is currently implementing technical cooperation and grant-in-aid for aid in the fields of environment and disaster prevention.  |  |
| 2. 2. Aim of development cooperation  |  |
| There are many island nations in the Caribbean region where the members of the Caribbean Community (Calicom) including Suriname are located, and natural disasters such as hurricanes, earthquakes, and tsunamis occur frequently, and the sustainable use of marine biological resources is promoted. It has something in common with Japan in terms of promotion. In addition to being vulnerable to climate change and natural disasters, Calicom member countries are based on industries that have a small population and economy and are susceptible to external factors such as agriculture, fisheries, and tourism. All 14 countries are included in the list of small island developing states published by the United Nations Secretariat. In order to overcome the vulnerabilities peculiar to small island developing states in the Calicom countries, it is necessary to cooperate by utilizing Japan's technology and knowledge in addition to deepening bilateral relations and socio-economics of each country. It is important from the viewpoint of financial stability and sustainable growth of the entire region.      |  |
| 3. 3. Basic policy  |  |
| In the Development Cooperation Charter, even if the per capita income is at a certain level, for countries with special vulnerabilities such as small island developing states, necessary cooperation will be provided according to the actual development needs and burden capacity of each country. For the Caribbean Community (Calicom) member countries, the first is based on the Japan-Calicom Joint Ministerial Statement adopted at the 4th Japan-Calicom Foreign Ministers' Meeting held in November 2014. In order to "cooperate for sustainable development including overcoming vulnerabilities peculiar to small island developing states", we will develop cooperation that makes use of Japan's technology and knowledge. In accordance with these policies, Suriname will support the overcoming of vulnerabilities peculiar to small island developing states by supporting environmentally friendly sustainable social development and disaster prevention efforts. We also reaffirmed that we will cooperate in accordance with this policy at the 5th Japan-Calicom Foreign Ministers' Meeting held in September 2016. |  |
| 4. Priority areas   |  |
| Environment / Disaster Prevention: Vulnerability peculiar to small island developing states in fields such as promotion of energy conservation, conversion to renewable energy, waste management, etc., while strengthening capacity to respond to floods and climate change along inland rivers. Provide the support necessary to overcome it. Also pay attention to sharing knowledge with other Calicom member countries.  |  |

Source: Ministry of Foreign Affairs HP Suriname Republic Country Data Collection 2017

**Table 22-2 National Development Cooperation Policy for Suriname (September 2016)**

|                                       |  |
|---------------------------------------|--|
| 3. 3. Priority field (medium goal)    |  |
| (1) Disaster prevention / environment | The "Development Plan 2012-2016" formulated by the Suriname government aims for sustainable growth while aiming to break away from the economy that depends on mineral resources. In particular, it is said that consideration should be given to waste management, renewable energy, sustainable water resources / natural resource management, etc., and Japan should confirm the needs of the other party in the fields of waste management and water resources management. Proceed with appropriate support. |
| (3) Others                            | (1) Suriname is blessed with abundant fishery resources, and the fishery industry plays an important role in both the acquisition of foreign currency through exports and the supply of protein to the   |

|  |  |
|--|--|
|  | <p>people. From the perspective of sustainable use of marine biological resources, pay attention to the sustainable development and management of the fishery industry.</p> <p>(2) Electricity supply tends to be insufficient outside the metropolitan area of Suriname, and improvement of energy efficiency is also required in the metropolitan area, so cooperation in fields such as energy efficiency and energy conservation will be considered.</p> |
|--|--|

Source: Survey Team

## (2) Survey on COVID-19 by development partners

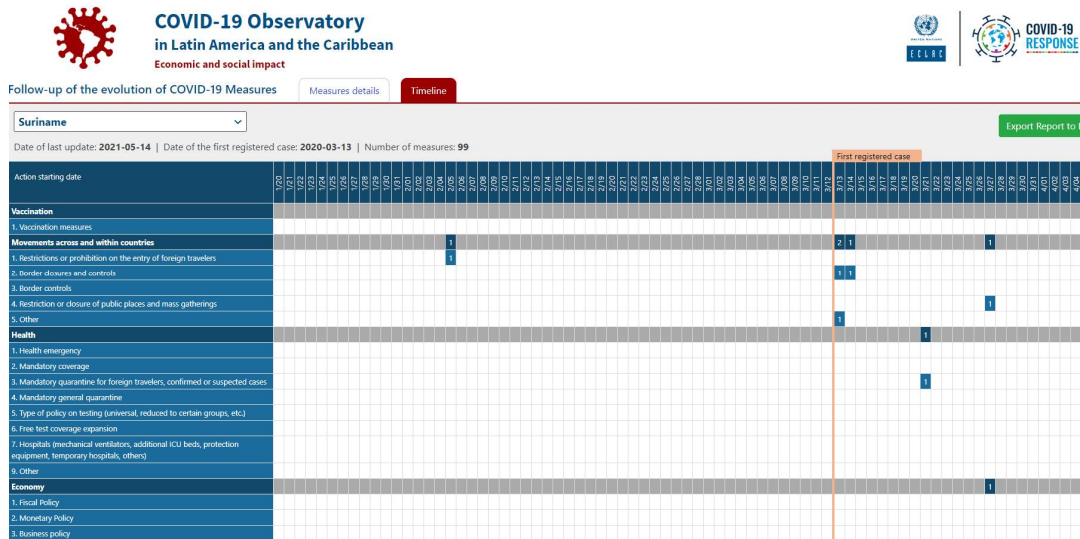
We extracted sector names and specific quantitative figures that have a large impact on the country-specific analysis described in various reports of development partners. Reports from the World Bank, OECD, BCIE, SICA, and the Ministry of Economy, Trade and Industry of Japan suggest the importance of introducing digitalization and innovation (Fintech, Aggrotech, Autotech, etc.), and incorporate the survey results of these development partners. I arranged it accordingly.

World Bank: "Growth and Revitalization" 2021 Semi-Annual Economic Report (March 2021)

- ✓ OECD: COVID-19 in LAC, Regional socio-economic implications and policy priorities (December 2020)
- ✓ BCIE: Impacto Económico del COVID-19 (April 2020)
- ✓ SICA: Estimación del Impacto Económico del COVID-19 en Centroamérica y República Dominicana (April 2020)
- ✓ Ministry of Economy, Trade and Industry of Japan: "The ideal way of economic and industrial policy based on the influence of the new corona virus" (June 2020), Accelerating digitalization and onlineization, gig economy, innovation in the transition period to a new daily life 1) Medical care / health, 2) Digital: Infrastructure development premised on the arrival of a digital society, 3) Green: Response to climate change problems, Energy security, 4) Emphasizes resilience.

### 22.1.5 Policies for COVID-19 measures taken by governments of each country

Various policies for COVID-19 taken by the government are described on the ECLAC homepage "COVID-19 Observatory" by country, time series, and field, and can be analyzed.



Source: <https://cepalstat-prod.cepal.org/forms/covid-countrysheet/index.html?table=2&country=SUR>

In this survey, the 15 policies implemented in Suriname listed on this website were classified by sector as much as possible.

#### 1) Infection spread and alleviation of aggravation and death

No data was available.

## 2) Support for affected industries and people

**Table 22-3 Support for Affected Industries and People (Suriname)**

| Various government policies (COVID-19 Observatory for LAC) |    |  |  |
|--|----|--|--|
| Socioeconomic policy                                       | 8  |  |  |
| Health care & nutrition                                    | 1  |  |  |
| Education  | 0  |  |  |
| Agriculture & rural development                            | 1  |  |  |
| Private sector   | 1  |  |  |
| Environment & disaster prevention                          | 0  |  |  |
| Governance and social security                             | 4  |  |  |
| DX and innovation  | 0  |  |  |
| Infrastructure & energy                                    | 0  |  |  |
| Tourism  | 0  |  |  |
| PPP  | 0  |  |  |
| Others (b)   | 0  |  |  |
| total  | 15 |  |  |

Source: Survey Team

## 3) Arrangement of various policies for COVID-19 taken by the government

COVID-19 Observatory for Latin America and Caribbean (ECLAC) organized by governments

**Table 22-4 Government-directed COVID-19 Policy Categories (Suriname)**

### Follow-up of the evolution of COVID-19 Measures

| Vaccination   | Economy  | Social protection   |
|---|--|---|
| 1. Vaccination measures   | 1. Fiscal Policy   | 1. Cash transfers (new transfers, increase in existing transfers, expansion of cash transfers to new recipients, early disbursement of transfers) |
| <b>Movements across and within countries</b>  | 2. Monetary Policy   | 2. Food transfers / In-kind transfers   |
| 1. Restrictions or prohibition on the entry of foreign travelers  | 3. Business policy   | 3. Guarantee of basic services  |
| 2. Border closures and controls   | 4. Restriction of economic activity (including shops and shopping centers)                             | <b>Education / schools</b>  |
| 3. Border controls  | 5. Price and quantity controls   | 1. Suspension of classes  |
| 4. Restriction or closure of public places and mass gatherings  | 6. Economic Stimulus (includes aggregate value of fiscal measures and separately of credit guarantees) | 2. Provision of tools for distance learning (online platforms, TV, radio, distance-learning materials)  |
| 5. Other  | 7. Regulation of the personal hygiene and cleaning products market                                     | 3. Maintenance of school feeding programme (indicating under which modalities)  |
| <b>Health</b>   | 8. Debt relief and suspension of credit payments (individuals, microentrepreneurs)                     | <b>Gender</b>   |
| 1. Health emergency   | 9. Other   | 1. Gender-based violence against women  |
| 2. Mandatory coverage   | <b>Labor</b>   | 2. Care economy   |
| 3. Mandatory quarantine for foreign travelers, confirmed or suspected cases                                   | 1. Labor Protection  | 3. Employment and income generation   |
| 4. Mandatory general quarantine   | 2. Elective work leave   | 4. Benefits, transfers and other social protection measures   |
| 5. Type of policy on testing (universal, reduced to certain groups, etc.)                                     | 3. Reduction of working hours  | 5. Women's participation in the digital era   |
| 6. Free test coverage expansion   | 4. Prohibition of dismissal from work  | 6. Other  |
| 7. Hospitals (mechanical ventilators, additional ICU beds, protection equipment, temporary hospitals, others) | 5. Other   |   |

Source: Survey Team



## 22.2 Macroeconomic analysis and selection of priority countries

### 22.2.1 Macroeconomic analysis

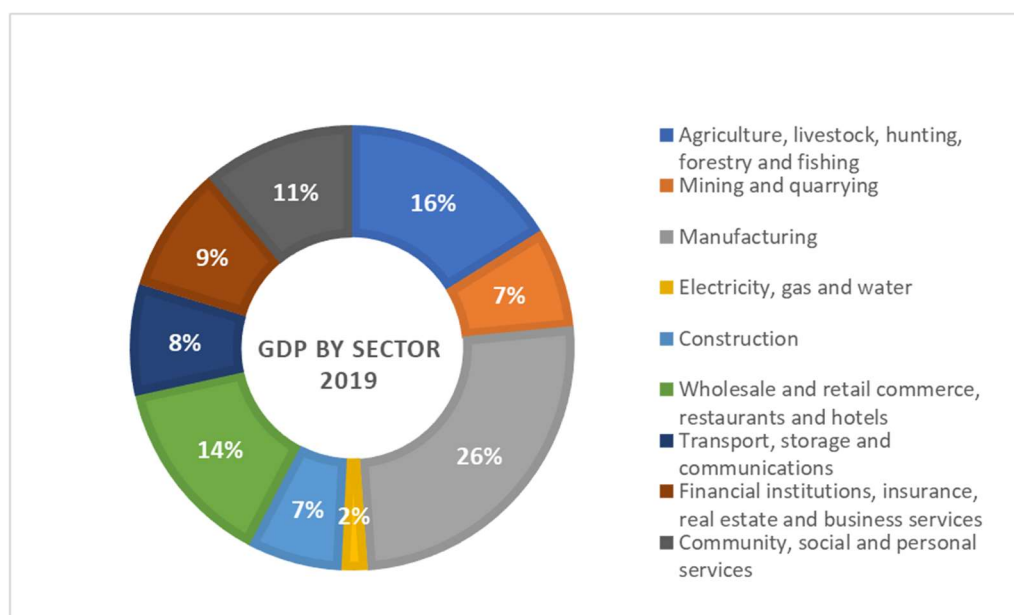
#### (1) Industrial composition

**Table 22-5 Industrial Composition (Suriname)**

Table: GDP by sector (Millones de dólares de Suriname a precios constantes de 2007)

|  | 2011  | 2012  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019a/ | 2020 b/ |
|--|-------|-------|-------|-------|-------|-------|-------|-------|--------|---------|
| Agriculture, livestock, hunting, forestry and fishing                | 1,065 | 1,173 | 1,071 | 1,108 | 1,154 | 1,166 | 1,311 | 1,370 | 1,446  |         |
| Mining and quarrying   | 630   | 649   | 633   | 596   | 509   | 459   | 666   | 663   | 657    |         |
| Manufacturing  | 2,086 | 1,708 | 1,857 | 1,706 | 1,724 | 1,849 | 2,247 | 2,217 | 2,274  |         |
| Electricity, gas and water   | 176   | 176   | 189   | 186   | 181   | 156   | 165   | 169   | 174    |         |
| Construction   | 452   | 452   | 473   | 565   | 657   | 549   | 561   | 592   | 618    |         |
| Wholesale and retail commerce, restaurants and hotels                | 1,970 | 2,126 | 2,183 | 2,148 | 1,918 | 1,265 | 1,097 | 1,203 | 1,242  |         |
| Transport, storage and communications                                | 635   | 664   | 666   | 693   | 712   | 721   | 694   | 731   | 723    |         |
| Financial institutions, insurance, real estate and business services | 807   | 873   | 1,056 | 938   | 914   | 980   | 826   | 831   | 830    |         |
| Community, social and personal services                              | 943   | 1,081 | 1,030 | 1,220 | 1,118 | 955   | 970   | 985   | 993    |         |
| Total  | 8,764 | 8,902 | 9,158 | 9,160 | 8,887 | 8,100 | 8,537 | 8,761 | 8,956  | 0       |

Source: ECLAC



Source: Survey Team



## (2) Trends in major economic indicators

**Table 22-6 Trends in Major Economic Indicator (Suriname)**

Table 1 SURINAM: MAIN ECONOMIC INDICATORS (Annual growth rates)

|  | 2011    | 2012    | 2013    | 2014    | 2015    | 2016    | 2017    | 2018    | 2019a/  | 2020 b/  |
|--|---------|---------|---------|---------|---------|---------|---------|---------|---------|----------|
| Gross domestic product (Annual growth rates c/)                                      | 5.8     | 2.7     | 2.9     | 0.3     | -3.4    | -5.6    | 1.8     | 2.6     | 0.3     | -10.1    |
| Per capita gross domestic product (Annual growth rates c/)                           | 4.3     | 2.3     | 1.8     | -0.8    | -4.4    | -6.5    | 0.8     | 1.0     | -0.7    | -11.1    |
| Gross domestic product, by sector (Annual growth rates c/)                           |         |         |         |         |         |         |         |         |         |          |
| Agriculture, livestock, hunting, forestry and fishing                                | 4.3     | 10.1    | -8.7    | 3.5     | 4.2     | 1.0     | 12.4    | 4.5     | 5.5     | -22.6    |
| Mining and quarrying   | 13.7    | 3.0     | -2.5    | -5.8    | -14.6   | -9.8    | 45.1    | -0.5    | -1.0    | -22.2    |
| Manufacturing  | 1.8     | -18.1   | 8.7     | -8.1    | 1.1     | 7.3     | 21.5    | -1.3    | 2.6     | -37.6    |
| Electricity, gas and water   | 13.5    | 0.0     | 7.4     | -1.6    | -2.7    | -13.8   | 5.8     | 2.4     | 2.7     | 6.7      |
| Construction   | 11.3    | 0.0     | 4.6     | 19.5    | 16.3    | -16.4   | 2.2     | 5.5     | 4.4     | -25.2    |
| Wholesale and retail commerce, restaurants and hotels                                | 3.0     | 7.9     | 2.7     | -1.6    | -10.7   | -34.0   | -13.3   | 9.7     | 3.2     | 13.8     |
| Transport, storage and communications  | 4.3     | 4.6     | 0.3     | 4.1     | 2.7     | 1.3     | -3.7    | 5.3     | -1.0    | 1.8      |
| Financial institutions, insurance, real estate and business services                 | 7.0     | 8.2     | 21.0    | -11.2   | -2.6    | 7.2     | -15.7   | 0.6     | -0.1    | -16.2    |
| Community, social and personal services  | 4.3     | 14.6    | -4.7    | 18.4    | -8.4    | -14.6   | 1.6     | 1.5     | 0.8     | 0.8      |
| Balance of Payments (Millions of dollars)  |         |         |         |         |         |         |         |         |         |          |
| Current account balance  | 431.3   | 162.4   | -196.0  | -416.4  | -786.4  | -160.5  | 60.9    | -118.0  | -410.6  | 274.8    |
| Goods balance  | 967.8   | 706.7   | 242.5   | 133.0   | -375.9  | 186.7   | 672.0   | 547.1   | 407.1   | 1,016.0  |
| Exports, f.o.b.  | 2,646.9 | 2,700.2 | 2,416.2 | 2,145.3 | 1,652.3 | 1,438.7 | 2,034.5 | 2,129.1 | 2,210.4 | 2,345.1  |
| Imports, f.o.b.  | 1,679.1 | 1,993.5 | 2,173.7 | 2,012.3 | 2,028.2 | 1,252.0 | 1,362.5 | 1,582.0 | 1,803.3 | -1,329.1 |
| Services trade balance   | -361.7  | -424.6  | -373.8  | -550.2  | -462.6  | -282.6  | -316.7  | -380.3  | -494.4  | -415.2   |
| Income balance   | -262.1  | -192.5  | -131.2  | -70.3   | -13.3   | -166.4  | -394.0  | -387.5  | -413.1  | -450.1   |
| Net current transfers  | 87.3    | 72.8    | 66.6    | 71.2    | 65.3    | 101.8   | 99.7    | 102.7   | 89.7    | 124.1    |
| Capital and financial balance (Millions of dollars)                                  |         |         |         |         |         |         |         |         |         |          |
| Net foreign direct investment d/   | 72.9    | 172.8   | 187.6   | 164.1   | 266.7   | 300.0   | 98.2    | 119.2   | 7.2     | -27.1    |
| Other capital movements d/   | -380.1  | -155.1  | -140.4  | 102.1   | 253.9   | -60.1   | -137.4  | 146.6   | 448.2   |          |
| Foreign remittance from abroad for 2019 and 2020                                     | -569.3  | -174.7  | -84.0   | 195.9   | 543.6   | 783.0   | -433.2  | -75.1   | 147.4   |          |
| Microfinance dispatched and the sectors that received microfinance for 2019 and 2020 |         |         |         |         |         |         |         |         |         |          |

Source: Economic Survey of Latin America and the Caribbean 2020: Main conditioning factors of fiscal and monetary policies in the post-COVID-19 era

### 22.2.2 Impact analysis and identification of key sectors

#### (1) Impact assessment results for each sector by AHP analytic hierarchy process based on economic indicators

**Table 22-7 Results of Sector Impact Analysis by COVID-19 (Suriname)**

| ECLAC category   | Changes around COVID-19 | Trends before COVID-19 | Total GDP ratio of the sector | comprehensive evaluation |   |
|--|-------------------------|------------------------|-------------------------------|--------------------------|---|
| Importance (weight)  | 0.4590                  | 0.0660                 | 0.0750                        |                          |   |
| Agriculture, livestock, hunting, forestry and fishing                | 7                       | 8                      | 8                             | 0.096                    | 3 |
| Mining and quarrying   | 6                       | 7                      | 3                             | 0.076                    | 4 |
| Manufacturing  | 9                       | 5                      | 9                             | 0.114                    | 1 |
| Electricity, gas and water   | 2                       | 3                      | 1                             | 0.026                    | 8 |
| Construction   | 8                       | 9                      | 2                             | 0.098                    | 2 |
| Wholesale and retail commerce, restaurants and hotels                | 1                       | 1                      | 7                             | 0.023                    | 9 |
| Transport, storage and communications                                | 3                       | 6                      | 4                             | 0.046                    | 7 |
| Financial institutions, insurance, real estate and business services | 5                       | 4                      | 5                             | 0.065                    | 5 |
| Community, social and personal services                              | 4                       | 2                      | 6                             | 0.054                    | 6 |

Source: Survey Team

#### 1) ECLAC Sector Classification Amendments to the Sector Classification

In line with the method described in the main volume, the Sector Classification is divided into the Vertical Sector and the Cross-Cutting Sector, the ECLAC classification sector is allocated to the Vertical Sector Classification, and the evaluation of various policies related to COVID-19 taken by the government along with the results of the partner survey and the indicators of the national development

cooperation policy, the ranking of priority sectors are calculated using the four indicators, which are described in the table below.

**Table 22-8 Ranking of Priority Sectors (Suriname)**

|                                   | Economic Indicator Analysis | Government Policy on COVID-19 | Survey on COVID-19 by Development Partners | Country Development Cooperation Policy | Base Case |   | Priority |
|-----------------------------------|-----------------------------|-------------------------------|--|--|-----------|---|----------|
| Importance (weight)               | 0.6000                      | 0.2000                        | 0.1000                                     | 0.1000                                 |           |   |          |
| Social and Economic Policy        | 0.0000                      | 0.1067                        | 0.0000                                     | 0.0000                                 | 0.1067    |   | ○        |
| Health and Nutrition              | 0.0305                      | 0.0133                        | 0.0000                                     | 0.0000                                 | 0.0438    | 4 |          |
| Education                         | 0.0259                      | 0.0000                        | 0.0000                                     | 0.0000                                 | 0.0259    | 6 |          |
| Agriculture and Rural Development | 0.1277                      | 0.0133                        | 0.0125                                     | 0.0167                                 | 0.1702    | 3 | ○        |
| Manufacturing                     | 0.1677                      | 0.0133                        | 0.0125                                     | 0.0167                                 | 0.2102    | 2 | ○        |
| Environment/ Disaster Management  | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0333                                 | 0.0333    |   | ○        |
| Governance and Security           | 0.0000                      | 0.0533                        | 0.0000                                     | 0.0000                                 | 0.0533    |   | ○        |
| DX Innovation                     | 0.0000                      | 0.0000                        | 0.0375                                     | 0.0000                                 | 0.0375    |   | ○        |
| Infrastructure and Every          | 0.2189                      | 0.0000                        | 0.0250                                     | 0.0333                                 | 0.2772    | 1 | ○        |
| Tourism                           | 0.0293                      | 0.0000                        | 0.0125                                     | 0.0000                                 | 0.0418    | 5 |          |
| Public-Private Partnership        | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0000                                 | 0.0000    |   | ○        |

Source: Survey Team

## (2) Sensitivity analysis

### 1) Analysis case settings

Based on the above methodology, the following case settings were made.

**Table 22-9 Sensitivity Analysis Case-based Weighting Settings (Suriname)**

|  | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|--|-----------|------------------------|------------------------|------------------------|
| Economic indicator analysis  | 0.6       | 0.6                    | 0.5                    | 0.5                    |
| Investigation and arrangement of various policies for COVID-19 taken by the government | 0.2       | 0.1                    | 0.1                    | 0.1                    |
| Development partner survey results   | 0.1       | 0.2                    | 0.2                    | 0.3                    |
| Country-specific development cooperation policy  | 0.1       | 0.1                    | 0.2                    | 0.1                    |

Source: Survey Team

### 2) Summary of sensitivity analysis

The results of each sensitivity analysis are as summarized below. Sensitivity analysis did not show much change, which was close to the result of the base case.

**Table 22-10 Summary of Sensitivity Analysis Results (Suriname)**

|                                   | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|-----------------------------------|-----------|------------------------|------------------------|------------------------|
| Social and economic policy        |           |                        |                        |                        |
| Health care / nutrition           | 4         | 4                      | 5                      | 5                      |
| education                         | 6         | 6                      | 6                      | 6                      |
| Agriculture / rural development   | 3         | 3                      | 3                      | 3                      |
| Manufacturing industry            | 2         | 2                      | 2                      | 2                      |
| Environment / disaster prevention |           |                        |                        |                        |
| Governance and citizen security   |           |                        |                        |                        |
| DX / Innovation                   |           |                        |                        |                        |
| Infrastructure and Energy         | 1         | 1                      | 1                      | 1                      |
| sightseeing                       | 5         | 5                      | 4                      | 4                      |
| Public-private partnership        |           |                        |                        |                        |

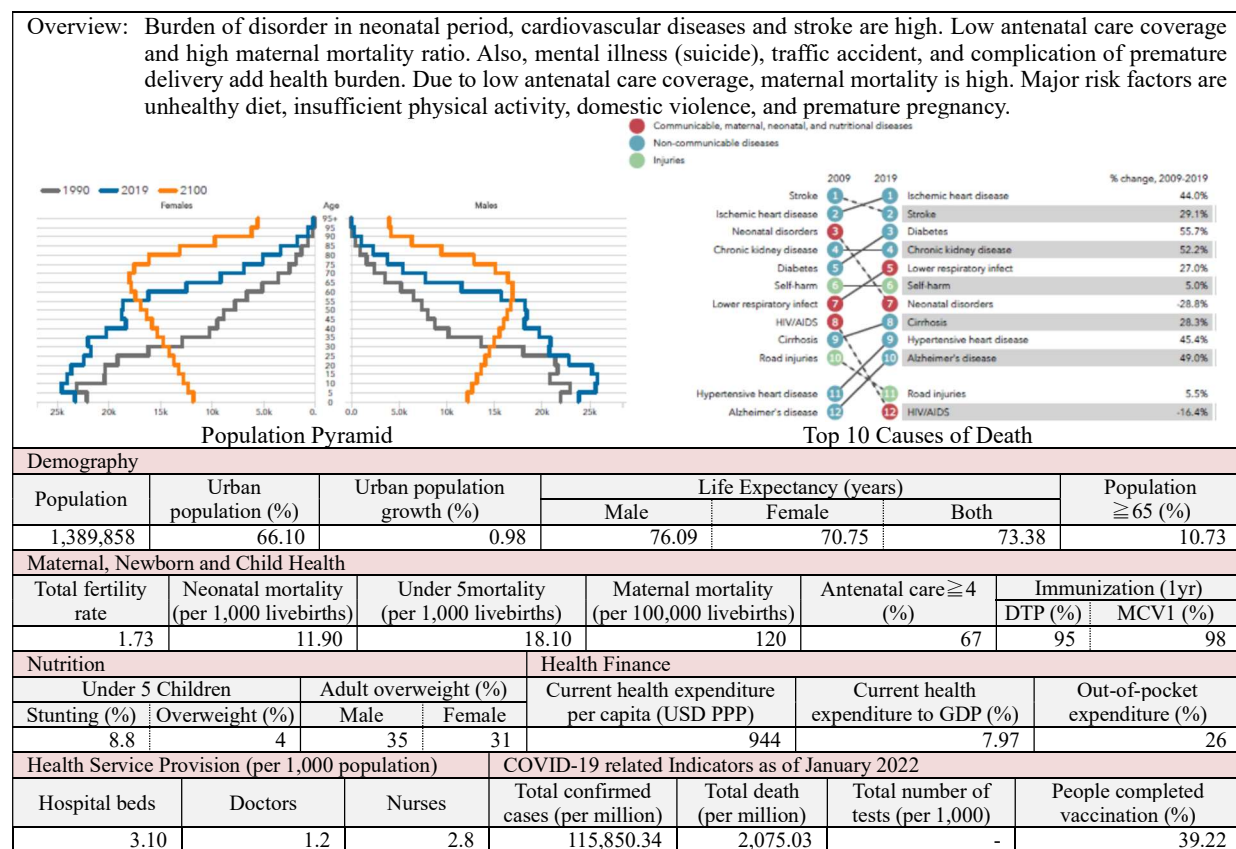
Source: Survey Team

### **(3) Selection of priority sectors by country**

From the above results, 1) social / economic policy, 2) agriculture / rural development, 3) manufacturing industry, 4) environment / disaster prevention, 5) governance / citizen security, 6) DX / innovation, 7) infrastructure / energy, 8) public-private partnership are selected as priority sectors.

## 22.3 Country-specific information by sector

### 22.3.1 Health care / nutrition



Source: Graphs=Institute for Health Metrics and Evaluation, County Profile; Demography, Total fertility rate, Neonatal mortality, under-5 mortality, Health finance= World Development Indicators, the World Bank (Accessed on Aug 2021); Maternal mortality= UNICEF (Sep 2019); Antenatal care, Immunization, Nutrition, Health service provision,= OECD/The World Bank (2020), Health at a Glance: Latin America and the Caribbean 2020; COVID-19 related indicators= Our World in Data (Accessed on Jan 2022)

| Health                                  |   |
|---|---|
| Leadership/ Governance                  | Responsible Agency: Ministerie van Volksgezondheid<br><a href="http://health.gov.sr/">http://health.gov.sr/</a><br>Centralized  |
|   | Major Relevant Policies: Nationaal Strategisch Plan voor Gezondheid en Welzijn in Suriname 2019- 2028   |
| Service Providing System                | Public sector covers from primary to tertiary, but number of private health facilities is more than the public ones at primary level. PHC services for inland areas are provided by Medical Mission and RGD for Urban-coastal area. |
| Health Finance                          | National health insurance (2014) Private sector is involved since 2016. The latest coverage is 75% of population between age 16 to 60.  |
| Human Resource for Health               | (No information)  |
| IT/ Digital Health                      | (No information)  |
| Drugs/ Medical Equipment                | (No information)  |
| Priority                                | MNCH and noncommunicable diseases   |
| Communicable Disease Emergency Response | Necessary action and responses are undertaken along with IHR.<br>National influenza center: Central Laboratory of the Bureau of Public Health   |
| Major Development Partners              | PAHO/WHO, UN agencies, IDB, Global Fund, and some bilateral donors, such as USAID, France   |
| Nutrition                               |   |
| Institutional Arrangement               | (No information)  |
| Major Relevant Policies                 | (No information)  |
| Human Resource for Health               | Nutrition related degrees: No<br>Nutrition related subjects in pre-service education: No<br>Number of nutrition related professionals: (No information)   |

Source: Survey Team with reference to WHO Country Cooperation Strategy for Suriname at a glance, May 2016, Institute for Health Metrics and Evaluation, County Profile, The Borgen Project, 8 Facts About Healthcare in Suriname, 2020, WHO, Global atlas of medical devices, 2017, and WHO, Nutrition Landscape Information System (NLIS)

## 22.3.2 Education

| Overview  |   |   |            |            |               |            |               |         |                  |    |    |    |    |    |                   |    |    |    |    |    |                           |    |    |    |    |    |                           |    |    |    |    |    |
|---|---|---|------------|------------|---------------|------------|---------------|---------|------------------|----|----|----|----|----|-------------------|----|----|----|----|----|---------------------------|----|----|----|----|----|---------------------------|----|----|----|----|----|
| Number of children  | Education level   | Preschool      primary      Lower secondary      Upper secondary  |            |            |               |            |               |         |                  |    |    |    |    |    |                   |    |    |    |    |    |                           |    |    |    |    |    |                           |    |    |    |    |    |
|   | 2019  | 19,924 people      68,147 people      37,353 people      19,705 people  |            |            |               |            |               |         |                  |    |    |    |    |    |                   |    |    |    |    |    |                           |    |    |    |    |    |                           |    |    |    |    |    |
| Source: Institute for Statistics (UIS), UNESCO Bureau of Statistics |   |   |            |            |               |            |               |         |                  |    |    |    |    |    |                   |    |    |    |    |    |                           |    |    |    |    |    |                           |    |    |    |    |    |
| Government authority  | Ministry of Education, Science and Culture  |   |            |            |               |            |               |         |                  |    |    |    |    |    |                   |    |    |    |    |    |                           |    |    |    |    |    |                           |    |    |    |    |    |
| Education indicator   | Net school enrollment rate: primary education 87.7% (2019), primary education completion rate 85.9% (2019), out-of-school children rate 12.3% (2019), public education budget GDP ratio 3.2% (2019) Source: UIS   |   |            |            |               |            |               |         |                  |    |    |    |    |    |                   |    |    |    |    |    |                           |    |    |    |    |    |                           |    |    |    |    |    |
| Impact of COVID-19  |   |   |            |            |               |            |               |         |                  |    |    |    |    |    |                   |    |    |    |    |    |                           |    |    |    |    |    |                           |    |    |    |    |    |
| School closure / reopening  | From March 11, 2020 to February 2, 2021, the number of completely closed days is 99, which is less than in other countries. From April to November 2021, remote classes are held.   |   |            |            |               |            |               |         |                  |    |    |    |    |    |                   |    |    |    |    |    |                           |    |    |    |    |    |                           |    |    |    |    |    |
| COVID-19 measures   | N / A   |   |            |            |               |            |               |         |                  |    |    |    |    |    |                   |    |    |    |    |    |                           |    |    |    |    |    |                           |    |    |    |    |    |
| Distance education  | Implementation status   | In basic education, the integrated curriculum is broadcast on television. Some schools offer virtual lessons using Zoom, Moodle, and Google Classroom. All teachers are instructed how to contact parents through available communication methods such as WhatsApp, email, phone and personal contact. No radio broadcast.  |            |            |               |            |               |         |                  |    |    |    |    |    |                   |    |    |    |    |    |                           |    |    |    |    |    |                           |    |    |    |    |    |
|   | Access  | The poorest 20% of families live in rural inland areas (84.9%), followed by rural coastal areas (31.5%) and urban areas (9.4%) (2018). Inland, isolated communities have no access to television broadcasts and difficult access to distance learning. Classes are broadcast on TV in areas where the poorest people live. School-aged children / students who can connect to the Internet at home (%) (2018)   |            |            |               |            |               |         |                  |    |    |    |    |    |                   |    |    |    |    |    |                           |    |    |    |    |    |                           |    |    |    |    |    |
|   |   | <table border="1"> <thead> <tr> <th></th> <th>Rural area</th> <th>Urban area</th> <th>Poor Class</th> <th>wealthy class</th> <th>Overall</th> </tr> </thead> <tbody> <tr> <td>Whole school age</td> <td>37</td> <td>57</td> <td>22</td> <td>93</td> <td>50</td> </tr> <tr> <td>Primary Education</td> <td>35</td> <td>56</td> <td>21</td> <td>94</td> <td>49</td> </tr> <tr> <td>Lower secondary education</td> <td>35</td> <td>57</td> <td>19</td> <td>91</td> <td>50</td> </tr> <tr> <td>Upper secondary education</td> <td>44</td> <td>59</td> <td>24</td> <td>94</td> <td>55</td> </tr> </tbody> </table> |            | Rural area | Urban area    | Poor Class | wealthy class | Overall | Whole school age | 37 | 57 | 22 | 93 | 50 | Primary Education | 35 | 56 | 21 | 94 | 49 | Lower secondary education | 35 | 57 | 19 | 91 | 50 | Upper secondary education | 44 | 59 | 24 | 94 | 55 |
|   |   | Rural area  | Urban area | Poor Class | wealthy class | Overall    |               |         |                  |    |    |    |    |    |                   |    |    |    |    |    |                           |    |    |    |    |    |                           |    |    |    |    |    |
| Whole school age  | 37  | 57  | 22         | 93         | 50            |            |               |         |                  |    |    |    |    |    |                   |    |    |    |    |    |                           |    |    |    |    |    |                           |    |    |    |    |    |
| Primary Education   | 35  | 56  | 21         | 94         | 49            |            |               |         |                  |    |    |    |    |    |                   |    |    |    |    |    |                           |    |    |    |    |    |                           |    |    |    |    |    |
| Lower secondary education   | 35  | 57  | 19         | 91         | 50            |            |               |         |                  |    |    |    |    |    |                   |    |    |    |    |    |                           |    |    |    |    |    |                           |    |    |    |    |    |
| Upper secondary education   | 44  | 59  | 24         | 94         | 55            |            |               |         |                  |    |    |    |    |    |                   |    |    |    |    |    |                           |    |    |    |    |    |                           |    |    |    |    |    |
|   | Source: UNICEF Global database on school-age digital connectivity   |   |            |            |               |            |               |         |                  |    |    |    |    |    |                   |    |    |    |    |    |                           |    |    |    |    |    |                           |    |    |    |    |    |
|   | Teacher training  | N / A   |            |            |               |            |               |         |                  |    |    |    |    |    |                   |    |    |    |    |    |                           |    |    |    |    |    |                           |    |    |    |    |    |
| School hygiene  | Infection control measures  | N / A   |            |            |               |            |               |         |                  |    |    |    |    |    |                   |    |    |    |    |    |                           |    |    |    |    |    |                           |    |    |    |    |    |
|   | Facility maintenance  | N / A   |            |            |               |            |               |         |                  |    |    |    |    |    |                   |    |    |    |    |    |                           |    |    |    |    |    |                           |    |    |    |    |    |
| School lunch / nutrition  | N / A   |   |            |            |               |            |               |         |                  |    |    |    |    |    |                   |    |    |    |    |    |                           |    |    |    |    |    |                           |    |    |    |    |    |
| Countermeasures for vulnerable people                               | N / A   |   |            |            |               |            |               |         |                  |    |    |    |    |    |                   |    |    |    |    |    |                           |    |    |    |    |    |                           |    |    |    |    |    |
| Support for donors, etc.  | It is supported by international organizations such as UNICEF and IDB on distance learning methods that provide digital content through platforms and television.<br>IDB: Strengthening quality of education and access (strengthening teacher leadership in first grade and early education, improving school infrastructure to strengthen access for children in remote areas) (\$ 30,000,000)<br>UNICEF: Sanitary infrastructure development, teaching material development for distance learning, psychological support, teacher capacity enhancement. Hand-washing awareness campaign through all schools and children's centers |   |            |            |               |            |               |         |                  |    |    |    |    |    |                   |    |    |    |    |    |                           |    |    |    |    |    |                           |    |    |    |    |    |

Source: Survey Team

## 22.3.3 Agriculture / rural development

|                                |   |
|--------------------------------|---|
| Urban / rural population ratio | 66.1% / 33.9% (FAOSTAT 2018)  |
| Agricultural land area         | 84,000 ha (FAOSTAT 2019) 1)   |
| Agricultural sector employment | 2.4% of all employment (male / female ratio: 84.8% / 15.2%) (FAOSTAT 2019) 2) |

|   |  |          |         |         |         |         |
|---|--|----------|---------|---------|---------|---------|
| Agricultural GDP                                  | 8.7% of total GDP (World Bank 2020)  |          |         |         |         |         |
| Of the agricultural sector Value added amount     | 371,118.33 thousand dollars (World Bank 2020) 3) * Statistics include forestry   |          |         |         |         |         |
| Agricultural sector expenditure ratio             | Ratio of agricultural fiscal expenditure to national budget (%) 4)   |          |         |         |         |         |
|   | 2018   | 2019     | 2020    |         |         |         |
|   | 1.71   | 3.86     | 4.56    |         |         |         |
| Agricultural sector import / export balance       | Trade Balance (USD1,000 FAOSTAT) 5)  |          |         |         |         |         |
|   |  | 2015     | 2016    | 2017    | 2018    | 2019    |
|   | export   | 82,956   | 105,150 | 114,491 | 113,818 | 148,205 |
|   | Import   | 246,556  | 193,837 | 200,926 | 166,006 | 196,972 |
|   | Balance of payments  | -163,600 | -88,687 | -86,435 | -52,188 | -48,767 |
| Agricultural development Policy / plan / strategy | <p>Although the relative importance of agriculture in Suriname's economy has declined over the last two decades (IDB 2017) 6), it contributes to stable employment in rural areas and accounts for 5% of the country's foreign exchange income. It remains socio-economically important as it makes an important contribution to food security through the production of rice, which is the mainstay of the population 6).</p> <p>The Republic of Suriname's National Agricultural Innovation Strategy (2013) 7) is a national strategic plan to establish Suriname's position as a food basket in the Caribbean by 2025, strengthening its competitiveness in domestic and overseas markets. Therefore, it promotes the innovation of farmers. This strategic plan will be implemented mainly by the National Agricultural Innovation Committee based on the core values of the following strategic plans. (I) An integrated, holistic "agricultural innovation system" approach. (Ii) Focus on results and set clear and quantified goals. (Iii) Import of key knowledge and technology of Suriname's agricultural innovation strategy (iv) Respond to the needs of stakeholders (farmers, processors, exporters, consumers). (V) Revitalize entrepreneurship and improve the skills of farmers and fishermen. (Vi) A dynamic educational institution that tries different approaches. It is expected that the performance of the agricultural innovation system will be improved and the yield will be increased.</p> <p>It promotes the development and dissemination of innovation by implementing collaborative programs with various research institutes related to agriculture, fisheries and forestry, and by involving stakeholders in the coordinated research agenda. Currently, the main crops supported by research and dissemination activities are rice (ADRON), cassava (CELOS), vegetables, fruits, flowers, and ornamental plants (ARSD) (the names in parentheses are the names of research institutions).</p>   |          |         |         |         |         |
| Impact of COVID-19                                | <p>Pandemic has resulted in aggravating the shortcomings and inefficiencies of the country's agricultural food system (GCF-FAO 2020) 8), which calls for the government to significantly reform the country's agricultural food system. It became a recognition. In particular, the growing population and the consumption demand for new "food" need to be met, jobs will be created by appropriate improvements in the agricultural food system, and exports will be efficiently promoted as a means of earning foreign currency and demand in the local market. It is expected to produce an effect 8).</p> <p>An IDB telephone survey report (2021) 9) found that in terms of employment, a pandemic caused 33% of family-owned industries to lose their jobs (although this employment type is 1 percent of the employment distribution). Domestic workers had the highest unemployment rate by employment type, at 37%. On the contrary, 7% of agricultural workers had the lowest unemployment rate, which was found to be the least affected employment type in an emergency 9). In addition, the economic sector, which has a high female participation rate, tends to be more seriously affected by employment 9). Females accounted for 15% of employment in the agricultural sector (FAO 2015), the fifth highest by industry.</p> <p>Macro and micro policies need to be considered for Suriname to recover from the global recession with COVID-19, and the United Nations embarks on a rapid assessment of socio-economic issues to determine and agree on areas of support. 8).</p> <p>The Inter-American Institute of Agricultural Cooperation (IICA) targets rural producers, women and youth organizations, taking into account the impact of the COVID-19 pandemic on agricultural inputs, agricultural processing materials, small agricultural equipment, and agricultural production. We are implementing initiatives to support our activities 10) 11). This initiative will improve short- to medium-term agricultural production and productivity, taking into account several factors, including COVID-19 pandemic mobility restrictions, health measures, and destabilization of the global food supply chain. The aim is to ensure access and availability of nutritious and healthy foods.</p> |          |         |         |         |         |
| Source / reference                                | <p>1) FAOSTAT-Land, Input and Sustainability-Land Use-Area-Agriculture (<a href="https://www.fao.org/faostat/en/#data/RL">https://www.fao.org/faostat/en/#data/RL</a>)</p> <p>2) FAOSTAT- Share of employment in agriculture (% of total employment) &amp; Share of female employment in agriculture (% of employment in agriculture) (<a href="https://www.fao.org/faostat/en/#data/OE">https://www.fao.org/faostat/en/#data/OE</a>)</p> <p>3) Agriculture, forestry, and fishing, value added (constant 2015 US \$) --Latin America &amp; Caribbean (<a href="https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart">https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart</a>)</p> <p>4) FAOSTAT-Government Expenditure-Share of Total Expenditure-Central Government (<a href="https://www.fao.org/faostat/en/#data/IG">https://www.fao.org/faostat/en/#data/IG</a>)</p>   |          |         |         |         |         |

|  |  |
|--|--|
|  | <p>5) FAOSTAT-Trade-Crops and livestock products-Import / Export Value-Agricultural Products (<a href="https://www.fao.org/faostat/en/#data/TCL">https://www.fao.org/faostat/en/#data/TCL</a>)</p> <p>6) Analysis-of-Agricultural-Policies-in-Suriname, 2017, IDB (<a href="https://publications.iadb.org/publications/english/document/Analysis-of-Agricultural-Policies-in-Suriname.pdf">https://publications.iadb.org/publications/english/document/Analysis-of-Agricultural-Policies-in-Suriname.pdf</a>)</p> <p>7) National Agricultural Innovation Strategy of the Republic of Suriname (<a href="http://extwprlegs1.fao.org/docs/pdf/sur171413.pdf">http://extwprlegs1.fao.org/docs/pdf/sur171413.pdf</a>)</p> <p>8) Improving the capacity of the Ministry of Agriculture of Suriname to build resilience to climate change in the agriculture sector, 2020, GCF-FAO (<a href="https://www.greenclimate.fund/sites/default/files/document/improving-capacity-ministry-agriculture-suriname-build-resilience-climate-change-agriculture-sector.pdf">https://www.greenclimate.fund/sites/default/files/document/improving-capacity-ministry-agriculture-suriname-build-resilience-climate-change-agriculture-sector.pdf</a>)</p> <p>9) The Consequences of COVID-19 on Livelihoods in Suriname: Evidence from a Telephone Survey, 2021, IDB (<a href="https://publications.iadb.org/publications/english/document/The-Consequences-of-COVID-19-on-Livelihoods-in-Suriname-Evidence-from-a-Telephone-Survey.pdf">https://publications.iadb.org/publications/english/document/The-Consequences-of-COVID-19-on-Livelihoods-in-Suriname-Evidence-from-a-Telephone-Survey.pdf</a>)</p> <p>10) Institutional Support for the Enhancement of Service Delivery to the Agricultural Sector Post-COVID-19 in the Caribbean Region (<a href="http://apps.iica.int/DashboardProyectos/programas/Detalle?CRON=5033&amp;SCRON=39">http://apps.iica.int/DashboardProyectos/programas/Detalle?CRON=5033&amp;SCRON=39</a>)</p> <p>11) IICA SUPPORTS COVID-19 FOOD SECURITY RESPONSE EFFORTS IN SURINAME (<a href="https://iica.int/es/node/22904">https://iica.int/es/node/22904</a>)</p> |
|--|--|

### 22.3.4 Private sector

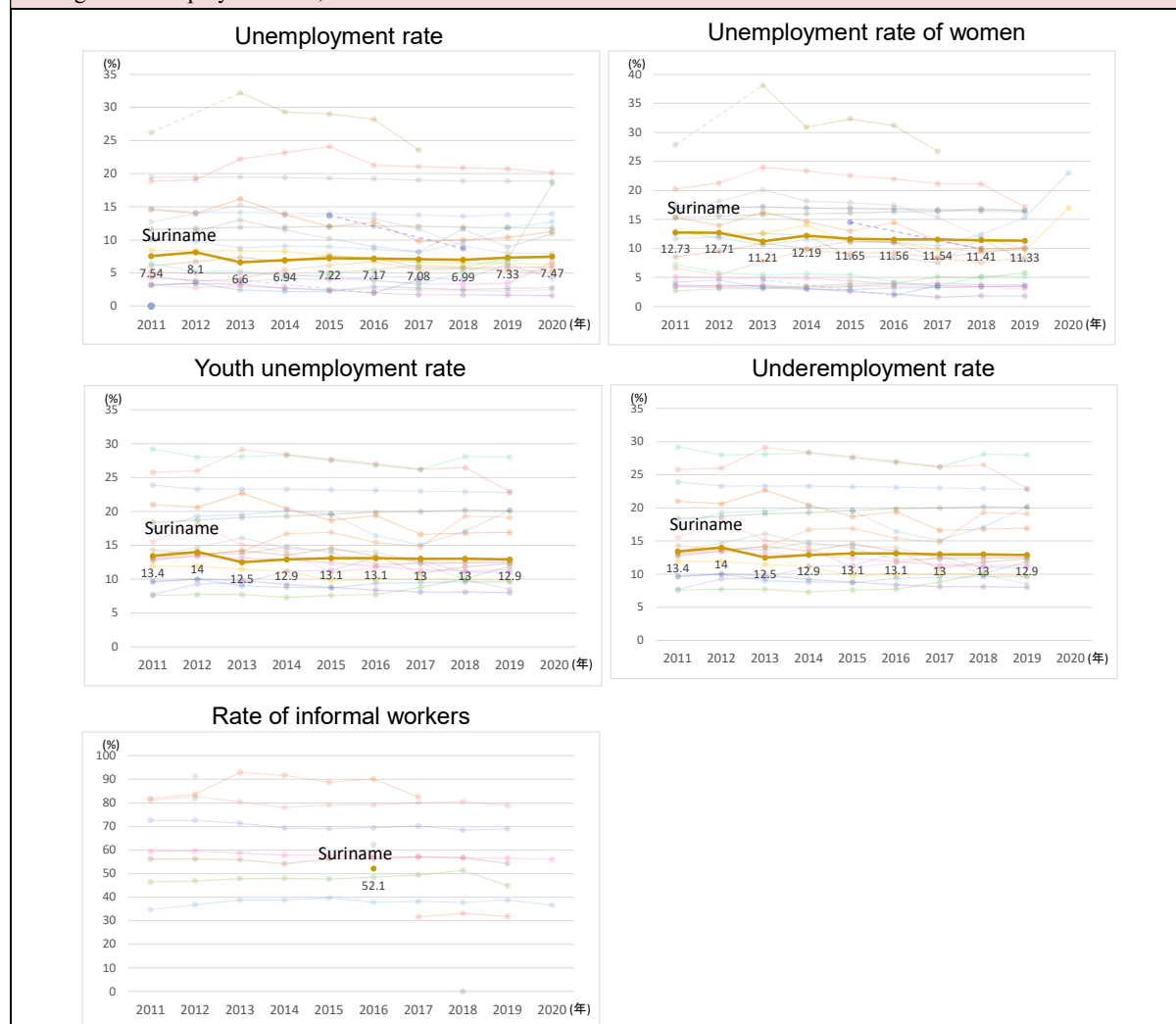
Suriname is a country with a slightly lower GDP per capita but a higher GDP per worker (4th). However, it is characteristic that the minimum wage is very low (20th). The unemployment rate is not high and has not changed significantly in the last 10 years.

|              | Index                      | Value  | Ranking                 | Year | Source             |
|--------------|----------------------------|--------|-------------------------|------|--------------------|
| Productivity | GDP per capita (USD)       | 6,491  | 15 (Among 22 countries) | 2020 | World Bank         |
|              | GDP per worker (USD)       | 48,510 | 4 (Among 18 countries)  | 2019 | World Bank         |
| Employment   | Minimum wage (USD / month) | 62     | 20 (Among 23 countries) | 2019 | ILO                |
|              | Unemployment rate          | 7.33   | 12 (Among 22 countries) | 2019 | Statista           |
|              | Female unemployment rate   | 11.33  | 16 (Among 22 countries) | 2019 | The Global Economy |
|              | Youth unemployment rate    | 15.31  | 12 (Among 22 countries) | 2019 | Statista           |
|              | Underemployment rate       | 12.9   | 11 (Among 18 countries) | 2019 | ILO                |
|              | Informal worker rate       | 52.1   | 4 (Among 12 countries)  | 2016 | ILO                |

Source: Described in the table



Changes in unemployment rate, etc.



Source: World Bank, ILO, The Global Economy, etc.

### 22.3.5 Environment / disaster prevention

|                     | item   | data  | remarks                          |
|---------------------|--|---|----------------------------------|
| environment         | Environmental agency                                     | Ministerie van Ruimtelijke Ordening en Milieu             |                                  |
|                     | Waste-related organizations                              |   |                                  |
|                     | Environmental Budget (USD)                               | 2019:-<br>2020:-<br>2021:-<br>3-year average:-            | not gotten                       |
|                     | Environmental budget per capita (2019-2021 average, USD) | -----   | not gotten                       |
|                     | Budget ratio to national budget (2019)                   | -----   | not gotten                       |
|                     | Donor support status                                     | Ten   | As of May 2021                   |
|                     | Renewable energy power generation (GWh) (2019)           | 972   | IRENA, 2021                      |
|                     | Geothermal power generation capacity (MWe)               | 2020: 0<br>2025 Forecast: 0                               | WGC, 2020                        |
| Disaster prevention | Disaster prevention organization                         | Nationaal Coördinatie Centrum voor Rampenbeheersing, NCCR |                                  |
|                     | Donor support status                                     | 1   | As of May 2021                   |
|                     | Number of natural disasters (2010-2020)                  | Major disasters:<br>floods, storms                        | (Statistical data not available) |
|                     | Number of victims (persons) per 100,000 population       | -----   | (Statistical data not available) |

Source: Survey Team

## 22.3.6 Governance and citizen security

| Item                                    | Overview   |  |
|---|--|--|
| Political system                        | Presidential Republic  |  |
| Election system                         | The President and Vice President are indirectly elected by the National Assembly.  |  |
| Legislative system                      | Unicameral National Assembly   |  |
| Most recent / next legislative election | Implemented on May 25, 2020 (next time is scheduled for May 2025)  |  |
| Appointment of judicial system / judge  | The judge is appointed by the president in consultation with the National Assembly, the National Advisory Board, and private lawyers.  |  |
| Political stability                     | At the average level of the region, not totally stable   |  |
| "Worldwide Governance Indicators" (WGI) | Corruption that prevail in society as a whole and in government undermine the rule of law (Freedom House 2021).  |  |
|   |  |  |
|   | Global freedom status  | 79/100 points (citizen rights: 34/40 points, political rights: 45/60 points)<br>Classified as "free country" (Freedom House 2021)  |
|   | Corruption Perception Index (CPI)  | 94/180th place, 38/100 points (Transparency International 2020)  |
|   | Government effectiveness   | According to WGI, it has deteriorated sharply since 2012.  |
|   | E-government development index   | Below the regional average, especially for the online service indicators. In terms of infrastructure development and human capital, it is lower than the Latin American regional average, but has reached the world average level. |
|   | Rule of law  | According to WGI, the level of "rule of law" is not stable. Rapidly improved since 2018.   |
| Citizen security                        | The homicide rate is extremely low compared to the Caribbean region, which is equivalent to the world average level. The homicide rate in 2017 was 5.4 / 100,000 (14 in the Caribbean and 6 in the world in the same year) (UNODC 2021). |  |

Source: Survey Team

## 22.3.7 DX / Innovation

|                                 |   |   |
|---------------------------------|---|---|
| Basic indicators and statistics | E-Government Ranking 1): 122nd                                    | Radar chart of e-government ranking<br> |
|                                 | Mobile connection index 2): 51.6                                  |   |
|                                 | Network Infrastructure Index: 57.3                                |   |
|                                 | Internet user rate 59.7   |   |
|                                 | Mobile connection rate 174.5                                      |   |
|                                 | Fixed broadband rate 13.8   |   |
|                                 | Rate of increase in the number of Internet users 11.7 (2021/2020) |   |

## Communication network

Suriname is the smallest country on the South American continent, but it has a high affinity with the Caribbean region and is one of the members of the Caribbean Community (CARICOM) 3). Telesur4), a state-owned telecommunications company, is the only provider of fixed-line and fixed-broadband services in the country, and fixed-line infrastructure is developing in populated coastal areas. On the other hand, it is poor in the inland areas where the population density is sparse, and the fixed broadband penetration rate 5) of the whole country is 15.7%, which is one of the lowest countries in the Caribbean region (17.3% on average). The company's national broadband project (TNBP) 6), which was launched in 2017, was completed in 2019 with the aim of updating the aging communication infrastructure to fiber networks, and considering that it is a low-income country, broadband spread. The degree of contribution to rate improvement is high. The mobile market is led by Telesur and Digicel, a key operator in the Caribbean and Pacific regions, which entered the market in 2007. According to Ookla's 2019 Mobile Broadband Speed Test Report7), Telesur has a big difference of 36.1 (Down) / 18.1 (Up) mbps and Digicel has a big difference of 9.8 (Down) / 2.8 (Up) mbps. In 2015, Digicel carried out the acquisition of United Telecommunication Services (UTS) Suriname, which is traded under the operator "UNIQA" brand with approximately 5,000 users8), and in 2017 in the Caribbean and Latin America. It is taking an aggressive business expansion strategy, such as signing a host contract with Transatel, an MVNO that operates in many markets9). The company also plans to complete the construction of a project "Deep Blue One" submarine cable10) connecting French Guiana, Suriname, Guyana and Trinidad Tobago in 2024, which is directly linked to regional industrial development of offshore oil and gas. It will provide services to the industry.

## National Strategy for Digital Transformation

Policies related to Communication and Information Technology (ICT) can be found in the National Policy Development Plan 2017-202111). At the time of making this development plan, the real growth rate of GDP in 2021 is at least 3.8% (2011 average level), considering that it was a negative growth period due to economic deterioration and the result was -10.4% in 2016. It is one of the most important issues to evaluate and improve existing policies and to establish the growth policies of each sector and the process to achieve them11). To that end, it is necessary to proceed with reforms of the Planning Government Audit Office and the procurement system, and there is an urgent need to develop a system (software) that integrates the project monitoring and evaluation (M & E) system of each sector with the financial management system of the public sector. 11).

As a policy of ICT itself, it is recognized that making it accessible to affordable broadband services is one of the top priorities, and the work to formulate a national strategy for broadband services is underway. Strategic goals include 1) Telecommunications Administration (TAS) 12) Execution of telecommunications strategies within a legal framework led by 2) Expansion of ICT infrastructure and provision of high quality and widespread service, 3) Education, Promotion of operations such as security, e-business, e-government, outsourcing, 4) operation of research facilities (CoE) 13) that convene experts, 5) enhancement of access in urban areas, and promotion of development in rural areas, Is listed.

## Characteristic efforts

The COVID-19 pandemic highlights some important issues for Suriname's private sector, including lack of digitization, financial inclusion and infrastructure, and IDB's online survey14) reveals six Caribbean countries (Jamaica, Suriname and Gaiana). , Bahama, Barbados, Trinidad and Tobago), with the lowest percentage of respondents reporting access to bank accounts and debit cards during pandemics. Only 52.2% of respondents showed access to bank accounts (regional average 73%), and even lower 29% (regional average 70%) had access to debit cards. As a countermeasure, Suriname Central Bank has started a business to promote the use of digital payment transactions. The government has already introduced an electronic payment system (SNEPS)15) in 2015, and as a promotion project to strengthen it, to provide opportunities for presenting and explaining innovative financial products between market participants and banks. Has introduced the "Innovation Hub" 16) and the "Regulatory Sandbox" 16), a system for testing products in a controlled and secure environment before delivering innovative financial products or services to the market.

## source

54. E-Gov-Index: a composite indicator that consists of three indexes (Online Service Index, Telecommunication Infrastructure Index and Human Capital Index), which are equally weighted. It ranges from 0 to 1, with 1 being the most developed.
55. Mobile Connectivity Index: an input index developed by GSMA to measure the performance against the four key enablers of mobile internet adoption – infrastructure, affordability, consumer readiness and content. (<https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2016/06/Mobile-Connectivity-Launch-Report.pdf>)
56. MEMBER STATES AND ASSOCIATE MEMBERS  
<https://caricom.org/member-states-and-associate-members/>
57. <https://www.telesur.sr/telesur-corporate/over-telesur/>
58. Fixed broadband subscriptions (per 100 people) --Suriname, Caribbean small states <https://data.worldbank.org/indicator/IT.NET.BBND.P2?locations=SR-S3>
59. Telesur Annual Report 2017 [https://www.telesur.sr/media/518514/Telesur\\_Annual\\_Report\\_2017\\_Webversion\\_final.pdf](https://www.telesur.sr/media/518514/Telesur_Annual_Report_2017_Webversion_final.pdf)
60. Speedtest Award Report for Suriname  
[https://www.speedtest.net/awards/reports/2019/2019\\_Suriname\\_Telesur\\_Mobile.pdf](https://www.speedtest.net/awards/reports/2019/2019_Suriname_Telesur_Mobile.pdf)
61. Digicel revealed as buyer of Suriname-based UNIQA  
<https://www.commsupdate.com/articles/2015/09/24/digicel-revealed-as-buyer-of-suriname-based-uniqa/>
62. Transatel adds Caribbean roaming with Digicel deal <https://www.capacitymedia.com/articles/3660127/Transatel-adds-Caribbean-roaming-with-Digicel-deal>
63. Digicel announces Caribbean Deep Blue One cable  
<https://www.totaltele.com/511172/Digicel-announces-Caribbean-Deep-Blue-One-cable>
64. Policy Development Plan 2017-2021 Suriname  
<http://observatorioplanificacion.cepal.org/sites/default/files/plan/files/SurinamePolicy-Development-Plan2017-2021-PartI.pdf>
65. Telecommunications Authority Suriname  
<https://www.tas.sr/over-tas/>
66. Everything You Need to Know About Centers of Excellence  
<https://gocatalant.com/coe-everything-you-need-to-know-about-centers-of-excellence/>
67. Suriname in Times of COVID-19: Navigating the Labyrinth  
<https://publications.iadb.org/publications/english/document/Suriname-in-Times-of-COVID-19-Navigating-the-Labyrinth.pdf>  
Case Study Green Power Feasibility Study – Digicel, Haiti  
<https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2012/06/Digicel-Haiti.pdf>
68. "Suriname Electronic Payment System" (SNEPS)  
<https://www.cbvs.sr/financieel-systeem/1926-sneps-betalingssysteem>
69. FINTECH, InnovationHub, Regulatory Sandbox  
<https://www.cbvs.sr/en/113-general-home/1688-fintech>

## 22.3.8 Infrastructure and Energy

| Transport                                 |   |
|---|---|
| Overview                                  | Inland transportation is mainly by car. There are 55 airports in Suriname, some of which are connected by regular flights. There was a railway (Lawa Railway, 86km), but it has stopped since the 1980s.  |
| Leadership governance                     | Ministry of Transport, Communication & Tourism  |
| Major development partners                | IADB  |
| Energy and electricity                    |   |
| Overview                                  | Eighty-seven percent of primary energy is petroleum and petroleum products, with an energy self-sufficiency rate of 97% in 2018. 40% of electricity is generated from fossils and the rest is generated from renewable energy (mainly 59% hydropower and 1% solar power). |
| Carbon neutral national plan              | Suriname's Final National Climate Change Policy, Strategy and Action Plan 2014-2021<br>Goal: No information   |
| Leadership governance and utility company | Ministry of Natural Resources<br>Energy Company Suriname (EBS)  |
| Major development partners                | IADB / GIZ  |

Source: JICA Study Team with reference to various websites of the government organization and international organization (WB / IEA / IRENA / US DOE).

## 22.3.9 Tourism

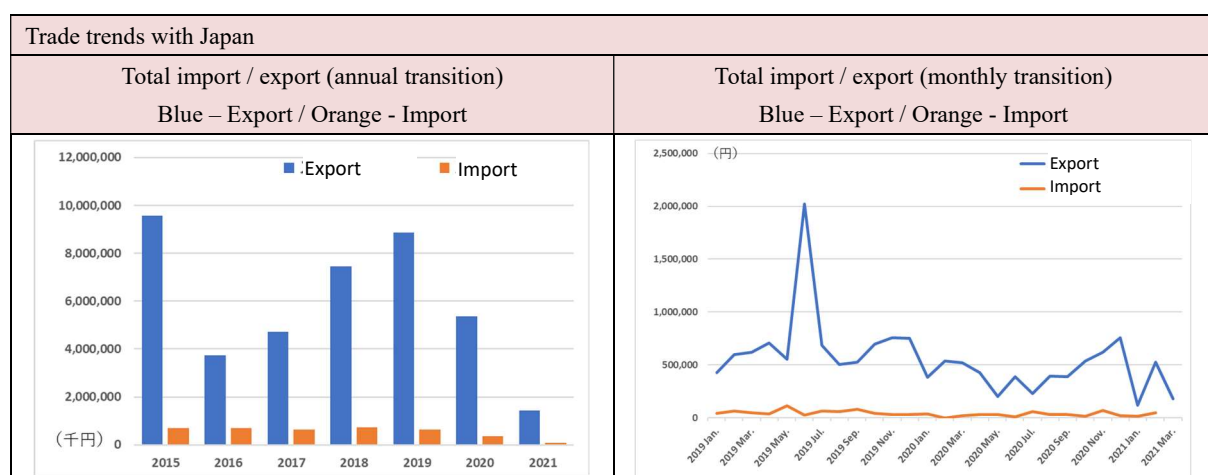
The least dependent on tourism among the 23 countries surveyed

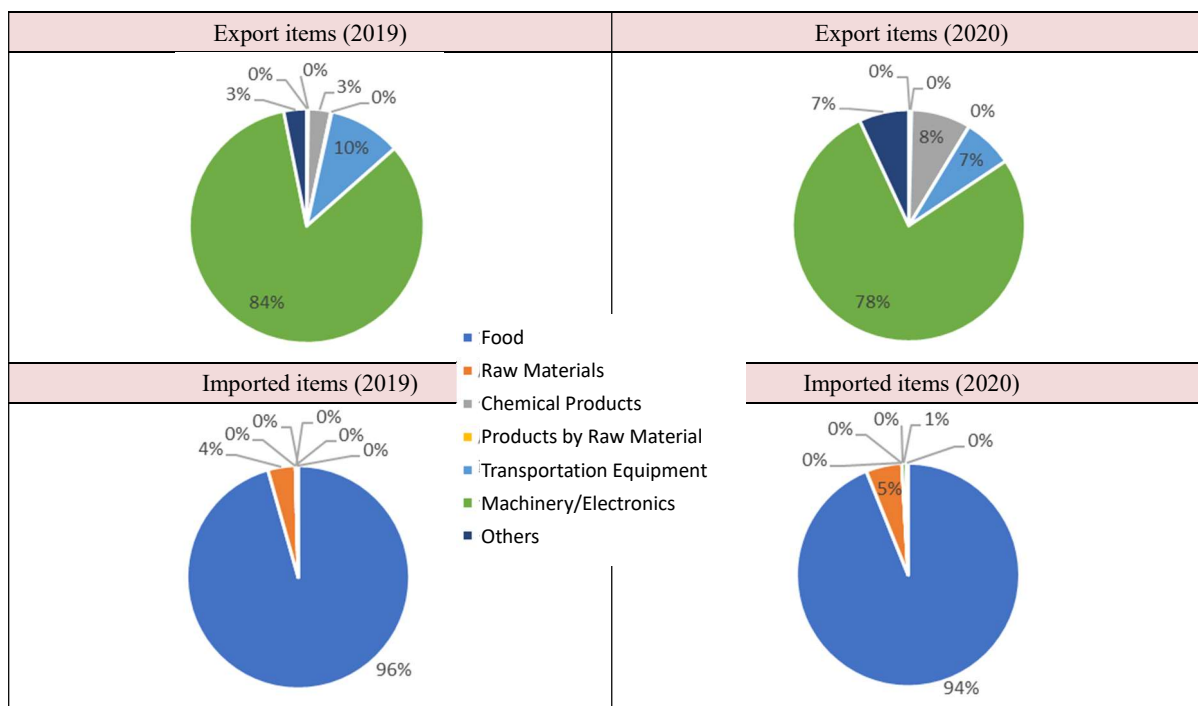
|  |  |  |
|--|--|--|
| Number of arrivals of international tourists (2017)          |  | 278,000  |
| International Tourism Receipts (2019)                        |  | USD 53 million   |
| Tourism Competitiveness Ranking (2019)                       |  | N / A  |
| Tourism Dependency Index (2019)                              |  | 3.5 (158th out of 166 countries)   |
| Government of Japan policy                                   | Number of JICA projects in the last 10 years   | none   |
|  | References to the Country Assistance Policy  | none   |
|  | Interest in pilot projects   | N / A  |
| Tourism industry vulnerability                               | Contribution of Travel & Tourism to GDP (2019)   | 2.6% (23rd out of 23 countries)  |
|  | Contribution of Travel & Tourism to employment (2019)  | 2.8% (23rd out of 23 countries)  |
|  | Ratio of international spending (2019)   | 67% (14th out of 23 countries)   |
|  | Top 3 countries of origin of visitors (2017)   | Netherlands (56.10%)<br>Guyana (11.73%)<br>French Guiana (11.39%)  |
| Importance of tourism  | Ratio of the budget amount of tourism-related ministries to the national budget amount (2019)            | N / A  |
|  | Whether or not it is mentioned as a priority sector in the National Economic and Social Development Plan | Yes<br>Plan name: Policy Development Plan 2017-2021<br>Reference example: Chapter VI: VI.8 Production Cluster Tourism and the Creative Industries (p. 100) as one of the Strategic Plans for the Production Clusters |
|  | Existence of effective national tourism policies / strategies / plans                                    | none   |
| Impact of COVID-19   | Changes in the contribution of Travel & Tourism to GDP (2019 → 2020)                                     | -65.0% (8th out of 23 countries)   |
|  | Changes in the contribution of Travel & Tourism to employment (2019 → 2020)                              | -26.9% (11th out of 23 countries)  |
| Number of government support measures for the tourism sector |  | N / A  |

Source: Survey Team

## 22.3.10 Public-private partnership

|  | item   | Contents    |
|--|--|-------------|
| No. of JICA Public-Private Partnership Projects (After 2012)                 | Cooperation preparatory survey (overseas investment and financing) (former PPP infrastructure project)           | 0 cases     |
|  | Overseas investment and loan   | 0 cases     |
|  | SME Partnership Promotion Survey (support for Small-sized Enterprise)  | 0 cases     |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for small- and medium- sized enterprise) | 0 cases     |
|  | SDGs Business Verification Survey with Private Sector (support for small- and medium- sized enterprise)          | 0 cases     |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for large enterprise)                    | 0 cases     |
|  | SDGs Business Verification Survey with Private Sector (support for large enterprise)                             | 0 cases     |
| Total number of Japanese private companies entering the market (2019 survey) | Total number of business locations   | 0 companies |
|  | Overseas branches of Japanese companies,   | 0 companies |
|  | Local corporations wholly owned by Japanese companies and their branches   | 0 companies |
|  | Branch offices wholly owned by Japanese companies and their branches   | 0 companies |
|  | joint ventures (local corporations in which Japanese companies have a direct or indirect stake of 10% or more)   | 0 companies |
|  | joint ventures (Branch offices in which Japanese companies have a direct or indirect stake of 10% or more)       | 0 companies |
|  | companies established overseas by Japanese nationals (in which Japanese nationals have a stake of 10% or more)   | 0 companies |
|  | Unknown classification   | 0 companies |
| Number of Japanese residents (2020 survey)                                   | Total  | 6 people    |
|  | Long-term residents  | 6 people    |
|  | Permanent resident   | 0 people    |
| Business Environment   | Doing Business 2020 Rank   | 162nd       |
| PPP Project  | Existence of PPP law scheme  | ×           |
|  | PPP project with Japanese companies  | 0 cases     |





**Gathering information about the PPP system**

| N°  | Task Item   | Inquiries/comments/status<br>Title of submitted file                                       | Source/URL  |
|-----|---|--|---|
| 1   | <b>PRIORITY 4_PPP Sector</b>  |  |   |
| 1.1 | PPP Projects in selective countries<br>PPP rules and regulations in Central America and Caribbean Countries |  | All below can be useful   |
| A   | PPP laws and Regulations<br>if there is any, when, and how  | There is no PPP Policy. See Caribbean Infrastructure PPP Roadmap Page 3                    | <a href="https://ppiaf.org/documents/1125/download">https://ppiaf.org/documents/1125/download</a>   |
| B   | PPP Unit Organization<br>if there is any, how structured  | There is no PPP Unit Organization. See Caribbean Infrastructure PPP Roadmap Page 3         | <a href="https://ppiaf.org/documents/1125/download">https://ppiaf.org/documents/1125/download</a>   |
| C   | PPP sectors<br>in what sectors are the PPPs allowed   | There is information about a PPP Project and the sector was ICT                            | <a href="https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true">https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true</a> |
| D   | Proposal Types (Solicited or Unsolicited)<br>unsolicited  | There is no information about the unsolicited proposals. The ICT PPP Project was solicited | <a href="https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true">https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true</a> |
| E   | PPP Forms<br>BOT,BTO,DB,,,what form are allowed   | The PPP Form of the PPP Project was Merchant   | <a href="https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true">https://ppi.worldbank.org/en/visualization#sector=&amp;status=&amp;ppi=&amp;investment=&amp;region=&amp;ida=&amp;income=&amp;ppp=&amp;mdb=&amp;year=&amp;excel=false&amp;map=CR%2CCU%2CDM%2CDO%2CSV%2CGT%2CGY%2CHT%2CHN%2CJM%2CMX%2CN%2CLC&amp;header=true</a> |
| F   | PPP types<br>Availability payment, service purchase   | -  |   |
| G   | PPP Project Trends<br>how much PPP projects in the last 10 years  | -  |   |
| H   | Participation of Japanese firms in PPP Projects<br>if any (check news source)                               | -  |   |
|     | Any notable points for each country<br>if any   | There is a Course from the IDB about PPP in Suriname                                       | <a href="https://cursos.iadb.org/en/indes/challenges-and-perspectives-public-private-partnerships-latin-american-experience">https://cursos.iadb.org/en/indes/challenges-and-perspectives-public-private-partnerships-latin-american-experience</a>   |

Source: Survey Team



## 23. Republic of Trinidad and Tobago

### 23.1 Country overview (basic information)

#### 23.1.1 Basic information

The Republic of Trinidad and Tobago (English: Republic of Trinidad and Tobago), commonly known as Trinidad and Tobago, is a republican territory consisting of two islands, Trinidad and Tobago, located in the southern part of the Lesser Antilles in the Caribbean Sea, and is a member of the United Kingdom. Is. Trinidad is an island nation located just 15 kilometers off the coast of Venezuela in South America, with Grenada to the north, Barbados to the northeast, and Venezuela to the south across the sea. The capital is Port of Spain. Famous for limbo dance and steelpan. African and Indian inhabitants are competing. It is the only West Indies with abundant oil and natural gas resources and is the center of the country's economy. It accounts for 40% of GDP and 80% of exports, but employs only 5%. Investment in liquefied natural gas (LNG), petrochemicals and steel has increased in recent years. There is a shift from oil to natural gas, reaching 70% of US LNG imports. Lake Pitch on Trinidad has one of the largest natural asphalt veins in the world. Tobago has a thriving tourism industry. There are also agricultural products such as citrus and cocoa, but the typical sugar cane industry disappeared in 2007.

#### 23.1.2 General circumstances

|             |  |                 |   |
|-------------|--|-----------------|---|
| 1 area      | 5,130 square kilometers (slightly larger than Chiba Prefecture)            | 2 Population    | 1.395 million (2019 World Bank)                                       |
| 3 Capital   | Port of Spain  | 4 ethnic groups | Indian (35.4%), African (34.2%), mixed race (23%), others (7.5%)      |
| 5 languages | English (official language), Hindi, French, Spanish, Trinidad Creole, etc. | 6 religion      | Christianity (Catholic, Anglican Church, etc.), Hinduism, Islam, etc. |

Source: Ministry of Foreign Affairs HP Trinidad and Tobago Basic Data

#### 23.1.3 Economic overview

|                          |   |                              |  |
|--------------------------|---|------------------------------|--|
| 1 Major industry         | Energy industry (petroleum / petroleum products, natural gas, methanol, ammonia, urea), steel products, groceries, cement   | 2 GNI<br>3 GNI / person      | US \$ 23,566 million (World Bank 2019)<br>US \$ 27,950 (2019, WDI) |
| 4 Economic growth rate   | 0.0% (2019 World Bank)  | 5 Unemployment rate          | 2.69% (2019) (ILO source)  |
| 6 Price increase rate    | 4.7% (2015), 4.8% (2016 estimate), 5.3% (2017 estimate), 5.4% (2018 estimate), 4.6% (2019 estimate) (IMF)   |                              |  |
| 7 Total trade amount     | Exports: US \$ 10.1 billion (goods only) (2018 WTO)<br>Imports: US \$ 1,585 million (2018) (WTO)  |                              |  |
| 8 Major trade items      | Export: Minerals / fuels, chemical products, industrial products, food<br>Imports: Minerals / fuels, industrial products, transportation equipment, food  |                              |  |
| 9 Major trading partners | Exports: USA, EU, Argentina, Colombia (2015, WTO)<br>Imports: USA, Gabon, EU, China   |                              |  |
| 10 currencies            | Trinidad and Tobago dollars (TT dollars)  | 11 Foreign currency reserves | na   |
| 12 National budget       | USD8,337,446,612 (2019)   | 13 External debt balance     | na   |
| 14 Economic overview     | Since independence, the petroleum and petrochemical sector has accounted for more than 50% of export revenue and government revenue. However, in the mid-1980s, an external factor such as a sharp drop in oil prices caused a serious economic crisis, and in the latter half of the 1980s, structural adjustments to the economy such as export promotion, deregulation, and promotion of privatization were forced. Since 1993, in addition to the oil sector, the natural gas and natural gas-related sectors have expanded, and growth has turned positive. Until the first half of 2008, export revenues surged due to soaring oil and natural gas prices, achieving positive growth for the 15th consecutive year. However, due to the impact of the global financial crisis, the economy was forced into recession between 2009 and 2011 due to sluggish growth in the energy sector and reduced production in the non-energy sector. In addition, after the global economic crisis, the dependence on the energy sector has led to industrial diversification. The fall in gas prices in 2016 affected the investment and production of local energy companies, and the sharp decline in energy revenues was an incentive to curb government spending. From the second half of 2017, signs of recovery from the long recession began to appear, supported by the recovery of |                              |  |



|  |  |
|--|--|
|  | international crude oil prices and the recovery of the downstream sector due to the activation of new gas field development. The economy since 2018 will be compared with the uptrend in gas production, with the start of new gas production, rising oil prices, recovery in government tax revenues and recovery in the non-energy sector due to increased loyalty from the natural gas sector. However, oil production remains stagnant, and Petrotrin (a state-owned oil company) announced in August 2018 that it would close its refinery and significantly reduce employment. It has an influential economic structure. |
|--|--|

Source: Ministry of Foreign Affairs HP Trinidad and Tobago Basic Data

## 23.1.4 Country-specific development cooperation policy

### (1) Government of Japan Development Cooperation Policy by Country

**Table 23-1 Overview of Japan's ODA to Trinidad and Tobago**

|   |  |
|---|--|
| <b>1. 1. Overview</b>   |  |
| Japan's economic cooperation with Trinidad and Tobago began with the acceptance of trainees in 1975, the dispatch of experts in 1987, and the Grant-in-Aid for Grassroots Human Security in 1999. Japan is currently implementing technical cooperation centered on accepting trainees in the fields of disaster prevention and the environment.  |  |
| <b>2. 2. Aim of development cooperation</b>   |  |
| There are many island nations in the Caribbean region where the Caribbean Community (Calicom) member countries including Trinidad and Tobago are located, and natural disasters such as hurricanes, earthquakes, and tsunamis occur frequently, and marine biological resources are sustainable. It has something in common with Japan in that it promotes its use. In addition to being vulnerable to climate change and natural disasters, Calicom member countries are based on industries that have a small population and economy and are susceptible to external factors such as agriculture, fisheries, and tourism. , All 14 countries are included in the list of small island developing states published by the United Nations Secretariat. In order to overcome the vulnerabilities peculiar to small island developing states in the Calicom countries, it is necessary to cooperate by utilizing Japan's technology and knowledge in addition to deepening bilateral relations and socio-economics of each country. It is important from the viewpoint of financial stability and sustainable growth of the entire region.  |  |
| <b>3. 3. Basic policy</b>   |  |
| In the Development Cooperation Charter, even if the per capita income is at a certain level, for countries with special vulnerabilities such as small island developing states, necessary cooperation will be provided according to the actual development needs and burden capacity of each country. For the Caribbean Community (Calicom) member countries, the first is based on the Japan-Calicom Joint Ministerial Statement adopted at the 4th Japan-Calicom Foreign Ministers' Meeting held in November 2014. In order to "cooperate for sustainable development including overcoming vulnerabilities peculiar to small island developing states", we will develop cooperation that makes use of Japan's technology and knowledge. In accordance with this policy, we will also provide necessary cooperation to Trinidad and Tobago, who have graduated from the OECD / DAC list of recipient countries / regions, based on the results of the survey on the need for assistance. At that time, we will support the overcoming of the vulnerabilities peculiar to small island developing states by supporting environmentally friendly sustainable social development and disaster prevention efforts. At the 5th Japan-Calicom Foreign Ministers' Meeting held in September 2016, we reconfirmed that we will cooperate in accordance with this policy. |  |
| <b>4. Priority areas</b>  |  |
| Disaster prevention / environment: Overcoming vulnerabilities peculiar to small island developing states based on the results of surveys on the need for support in fields such as strengthening community disaster prevention capacity, promoting energy conservation and switching to renewable energy, and waste management. Deploy the support needed for this. Also pay attention to sharing knowledge with other Calicom member countries.  |  |

Source: Ministry of Foreign Affairs HP Trinidad and Tobago Country Data Collection 2017

**Table 23-2 National Development Cooperation Policy for Trinidad and Tobago (September 2016)**

|   |  |
|---|--|
| <b>3. 3. Priority field (medium goal)</b> |  |
| (1) Disaster prevention / environment     | In Trinidad and Tobago, flood damage caused by heavy rains has become chronic, and strengthening community disaster prevention capacity is an urgent issue, and support will be provided in the fields of disaster prevention and climate change countermeasures. Is a country that produces crude oil, but its per capita CO2 emissions are one of the highest in the world, which is an important issue, and we are providing support for the conversion to renewable energy and the promotion of energy conservation. |
| (3) Others                                | (1) Waste management is particularly important for small island nations whose main industry is the tourism industry. 3R (reduction of waste generation, reuse of resources and products, recycling) ), But the issue is the legislation and operation management related to the waste treatment plant.<br>(2) The economy relies heavily on crude oil and natural gas, and is working to diversify the economy by modernizing the agriculture and fisheries sectors and promoting tourism development.                   |

Source: Survey Team



## 2) Support for affected industries and people

**Table 23-3 Support for Affected Industries and People (Trinidad and Tobago)**

| Various government policies (COVID-19 Observatory for LAC) |    |  |  |
|--|----|--|--|
| Socioeconomic policy                                       | 11 |  |  |
| Health care & nutrition                                    | 5  |  |  |
| Education  | 2  |  |  |
| Agriculture & rural development                            | 0  |  |  |
| Private sector   | 9  |  |  |
| Environment & disaster prevention                          | 0  |  |  |
| Governance and social security                             | 4  |  |  |
| DX and innovation  | 0  |  |  |
| Infrastructure & energy                                    | 0  |  |  |
| Tourism  | 0  |  |  |
| PPP  | 0  |  |  |
| Others (b)   | 7  |  |  |
| total  | 38 |  |  |

Source: Survey Team

## 3) Arrangement of various policies for COVID-19 taken by the government

COVID-19 Observatory for Latin America and Caribbean (ECLAC) organized by governments

**Table 23-4 Government-directed COVID-19 Policy Categories (Trinidad and Tobago)**

Follow-up of the evolution of COVID-19 Measures

| Vaccination   | Economy  | Social protection   |
|---|--|---|
| 1. Vaccination measures   | 1. Fiscal Policy   | 1. Cash transfers (new transfers, increase in existing transfers, expansion of cash transfers to new recipients, early disbursement of transfers) |
| <b>Movements across and within countries</b>  | 2. Monetary Policy   | 2. Food transfers / In-kind transfers   |
| 1. Restrictions or prohibition on the entry of foreign travelers  | 3. Business policy   | 3. Guarantee of basic services  |
| 2. Border closures and controls   | 4. Restriction of economic activity (including shops and shopping centers)                             | <b>Education / schools</b>  |
| 3. Border controls  | 5. Price and quantity controls   | 1. Suspension of classes  |
| 4. Restriction or closure of public places and mass gatherings  | 6. Economic Stimulus (includes aggregate value of fiscal measures and separately of credit guarantees) | 2. Provision of tools for distance learning (online platforms, TV, radio, distance-learning materials)  |
| 5. Other  | 7. Regulation of the personal hygiene and cleaning products market                                     | 3. Maintenance of school feeding programme (indicating under which modalities)  |
| <b>Health</b>   | 8. Debt relief and suspension of credit payments (individuals, microentrepreneurs)                     | <b>Gender</b>   |
| 1. Health emergency   | 9. Other   | 1. Gender-based violence against women  |
| 2. Mandatory coverage   | <b>Labor</b>   | 2. Care economy   |
| 3. Mandatory quarantine for foreign travelers, confirmed or suspected cases                                   | 1. Labor Protection  | 3. Employment and income generation   |
| 4. Mandatory general quarantine   | 2. Elective work leave   | 4. Benefits, transfers and other social protection measures   |
| 5. Type of policy on testing (universal, reduced to certain groups, etc.)                                     | 3. Reduction of working hours  | 5. Women's participation in the digital era   |
| 6. Free test coverage expansion   | 4. Prohibition of dismissal from work  | 6. Other  |
| 7. Hospitals (mechanical ventilators, additional ICU beds, protection equipment, temporary hospitals, others) | 5. Other   |   |

Source: Survey Team

## 23.2 Macroeconomic analysis and selection of priority countries

### 23.2.1 Macroeconomic analysis

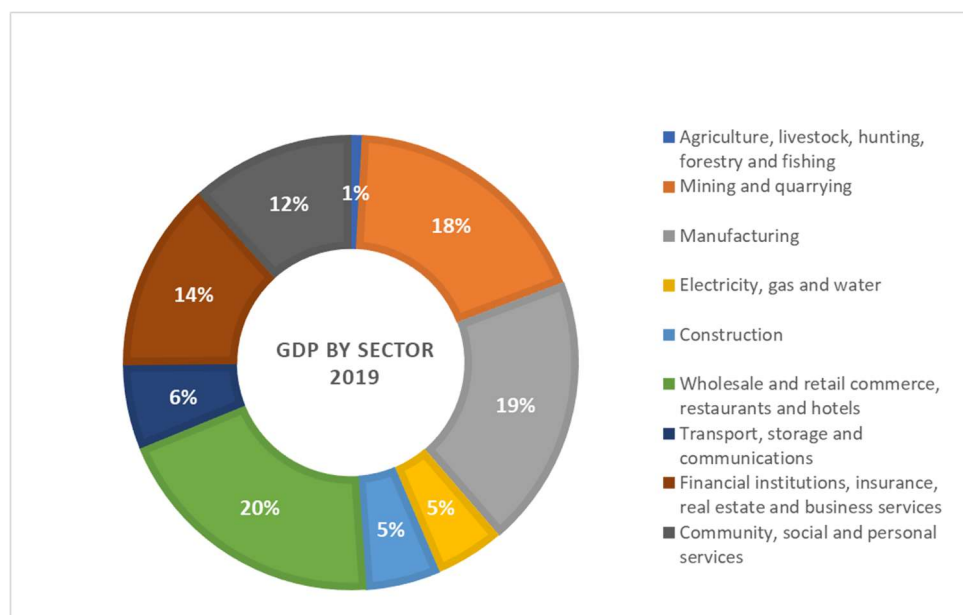
#### (1) Industrial composition

**Table 23-5 Industrial Composition (Trinidad and Tobago)**

Table: GDP by sector (En millones de dólares de Trinidad y Tabago a precios constantes de 2000)

|  | 2011   | 2012    | 2013    | 2014    | 2015    | 2016    | 2017    | 2018    | 2019a/  | 2020 b/ |
|--|--------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Agriculture, livestock, hunting, forestry and fishing                | 458    | 1,058   | 1,049   | 1,081   | 1,468   | 1,361   | 1,468   | 1,327   | 1,284   |         |
| Mining and quarrying   | 35,383 | 35,808  | 36,514  | 36,162  | 35,006  | 30,387  | 30,445  | 29,102  | 28,142  |         |
| Manufacturing  | 7,861  | 31,767  | 31,866  | 31,068  | 31,741  | 30,975  | 30,243  | 30,330  | 29,656  |         |
| Electricity, gas and water   | 1,353  | 7,336   | 7,382   | 7,080   | 7,201   | 6,807   | 7,193   | 7,354   | 7,481   |         |
| Construction   | 4,479  | 8,779   | 9,452   | 9,575   | 9,319   | 8,923   | 8,764   | 8,751   | 8,105   |         |
| Wholesale and retail commerce, restaurants and hotels                | 13,653 | 33,872  | 34,087  | 34,457  | 36,175  | 33,748  | 30,348  | 29,884  | 30,493  |         |
| Transport, storage and communications                                | 7,275  | 9,412   | 10,087  | 10,401  | 10,213  | 9,054   | 9,088   | 9,259   | 9,169   |         |
| Financial institutions, insurance, real estate and business services | 13,075 | 18,053  | 19,467  | 19,065  | 19,146  | 19,421  | 19,983  | 20,275  | 20,583  |         |
| Community, social and personal services                              | 8,098  | 16,174  | 16,395  | 16,898  | 17,137  | 17,339  | 17,423  | 17,275  | 17,821  |         |
| Total  | 91,635 | 162,259 | 166,299 | 165,787 | 167,405 | 158,017 | 154,955 | 153,556 | 152,732 | 0       |

Source: ECLAC



Source: Survey Team

## (2) Trends in major economic indicators

**Table 23-6 Trends in Major Economic Indicator (Trinidad and Tobago)**

Table 1 TRINIDAD AND TOBAGO: MAIN ECONOMIC INDICATORS (Annual growth rates)

|  | 2011   | 2012   | 2013   | 2014   | 2015   | 2016   | 2017   | 2018   | 2019a/ | 2020 b/ |
|--|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------|
| Gross domestic product (Annual growth rates c/)                                      | -0.3   | 1.3    | 2.2    | -0.9   | 1.8    | -6.3   | -2.3   | -0.2   | -0.4   | -6.8    |
| Per capita gross domestic product (Annual growth rates c/)                           | -0.9   | 0.6    | 1.6    | -1.5   | 1.2    | -6.8   | -2.8   | -0.7   | -0.8   | -7.2    |
| Gross domestic product, by sector (Annual growth rates c/)                           |        |        |        |        |        |        |        |        |        |         |
| Agriculture, livestock, hunting, forestry and fishing                                | 0.3    | -12.6  | -0.9   | 3.0    | 35.9   | -7.3   | 7.9    | -9.6   | ...    |         |
| Mining and quarrying   | -3.9   | -2.8   | 2.0    | -1.0   | -3.2   | -13.2  | 0.2    | -4.4   | ...    |         |
| Manufacturing  | -0.3   | 0.9    | 0.3    | -2.5   | 2.2    | -2.4   | -2.4   | 0.3    | ...    |         |
| Electricity, gas and water   | 6.4    | 2.5    | 0.6    | -4.1   | 1.7    | -5.5   | 5.7    | 2.2    | ...    |         |
| Construction   | -8.8   | -2.0   | 7.7    | 1.3    | -2.7   | -4.2   | -1.8   | -0.1   | ...    |         |
| Wholesale and retail commerce, restaurants and hotels                                | 9.8    | -0.9   | 0.6    | 1.1    | 5.0    | -6.7   | -10.1  | -1.5   | ...    |         |
| Transport, storage and communications  | 2.8    | 14.4   | 7.2    | 3.1    | -1.8   | -11.3  | 0.4    | 1.9    | ...    |         |
| Financial institutions, insurance, real estate and business services                 | 5.3    | 3.0    | 7.8    | -2.1   | 0.4    | 1.4    | 2.9    | 1.5    | ...    |         |
| Community, social and personal services  | 1.3    | 0.9    | 1.4    | 3.1    | 1.4    | 1.2    | 0.5    | -0.9   | ...    |         |
| Balance of Payments (Millions of dollars)  |        |        |        |        |        |        |        |        |        |         |
| Current account balance  | 4,263  | 3,460  | 5,253  | 3,820  | 1,744  | -980   | 1,208  | 1,386  | 1,168  | -380    |
| Goods balance  | 8,463  | 7,093  | 8,317  | 7,045  | 3,884  | 1,216  | 2,994  | 3,852  | 2,469  | -334    |
| Exports, f.o.b.  | 17,041 | 16,325 | 17,593 | 14,965 | 11,414 | 8,304  | 9,446  | 10,520 | 8,534  | 4,039   |
| Imports, f.o.b.  | 8,579  | 9,232  | 9,276  | 7,919  | 7,529  | 7,089  | 6,452  | 6,668  | 6,065  | 4,373   |
| Services trade balance   | -1,351 | -1,312 | -1,443 | -1,416 | -1,790 | -1,777 | -2,113 | -1,701 | -1,067 |         |
| Income balance   | -2,820 | -2,296 | -1,567 | -1,723 | -240   | -428   | 47     | -669   | -251   |         |
| Net current transfers  | -29    | -24    | -54    | -87    | -111   | 10     | 280    | -96    | 18     |         |
| Capital and financial balance (Millions of dollars)                                  |        |        |        |        |        |        |        |        |        |         |
| Net foreign direct investment d/   | -26    | -2,094 | -1,192 | 679    | 48     | 2      | -445   | -767   | -138   |         |
| Other capital movements d/   | -3,435 | -1,979 | -3,255 | -3,178 | -3,357 | 511    | -1,860 | -1,414 |        |         |
| Foreign remittance from abroad for 2019 and 2020                                     | -4,816 | -6,281 | -6,369 | -6,015 | -4,222 | -3,548 | 84     | -2,257 | -2,850 |         |
| Microfinance dispatched and the sectors that received microfinance for 2019 and 2020 |        |        |        |        |        |        |        |        |        |         |

Source: Economic Survey of Latin America and the Caribbean 2020: Main conditioning factors of fiscal and monetary policies in the post-COVID-19 era

### 23.2.2 Impact analysis and identification of key sectors

#### (1) Impact assessment results for each sector by AHP analytic hierarchy process based on economic indicators

**Table 23-7 Results of Sector Impact Analysis by COVID-19 (Trinidad and Tobago)**

| ECLAC category   | Changes around COVID-19 | Trends before COVID-19 | Total GDP ratio of the sector | comprehensive evaluation |   |
|--|-------------------------|------------------------|-------------------------------|--------------------------|---|
| Importance (weight)  | 0.4590                  | 0.0660                 | 0.0750                        |                          |   |
| Agriculture, livestock, hunting, forestry and fishing                |                         | 8                      | 1                             | 0.0134                   | 7 |
| Mining and quarrying   |                         | 1                      | 7                             | 0.0131                   | 8 |
| Manufacturing  |                         | 3                      | 8                             | 0.018                    | 5 |
| Electricity, gas and water   |                         | 6                      | 2                             | 0.012                    | 9 |
| Construction   | 8                       | 2                      | 3                             | 0.126                    | 3 |
| Wholesale and retail commerce, restaurants and hotels                | 9                       | 4                      | 9                             | 0.154                    | 1 |
| Transport, storage and communications                                | 8                       | 7                      | 4                             | 0.135                    | 2 |
| Financial institutions, insurance, real estate and business services | 6                       | 9                      | 6                             | 0.112                    | 4 |
| Community, social and personal services                              |                         | 5                      | 5                             | 0.016                    | 6 |

Source: Survey Team

#### 1) ECLAC Sector Classification Amendments to the Sector Classification

In line with the method described in the main volume, the Sector Classification is divided into the Vertical Sector and the Cross-Cutting Sector, the ECLAC classification sector is allocated to the Vertical Sector Classification, and the evaluation of various policies related to COVID-19 taken by the

government along with the results of the partner survey and the indicators of the national development cooperation policy, the ranking of priority sectors are calculated using the four indicators, which are described in the table below.

**Table 23-8 Ranking of Priority Sectors (Trinidad and Tobago)**

|                                   | Economic Indicator Analysis | Government Policy on COVID-19 | Survey on COVID-19 by Development Partners | Country Development Cooperation Policy | Base Case |   | Priority |
|-----------------------------------|-----------------------------|-------------------------------|--|--|-----------|---|----------|
| Importance (weight)               | 0.6000                      | 0.2000                        | 0.1000                                     | 0.1000                                 |           |   |          |
| Social and Economic Policy        | 0.0000                      | 0.0579                        | 0.0000                                     | 0.0000                                 | 0.0579    |   | ○        |
| Health and Nutrition              | 0.0365                      | 0.0263                        | 0.0000                                     | 0.0000                                 | 0.0628    | 5 |          |
| Education                         | 0.0303                      | 0.0105                        | 0.0000                                     | 0.0000                                 | 0.0408    | 6 |          |
| Agriculture and Rural Development | 0.1076                      | 0.0000                        | 0.0000                                     | 0.0000                                 | 0.1076    | 3 | ○        |
| Manufacturing                     | 0.1449                      | 0.0474                        | 0.0143                                     | 0.0200                                 | 0.2265    | 2 | ○        |
| Environment/ Disaster Management  | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0400                                 | 0.0400    |   | ○        |
| Governance and Security           | 0.0000                      | 0.0211                        | 0.0000                                     | 0.0000                                 | 0.0211    |   | ○        |
| DX Innovation                     | 0.0000                      | 0.0000                        | 0.0429                                     | 0.0000                                 | 0.0429    |   | ○        |
| Infrastructure and Every          | 0.2272                      | 0.0000                        | 0.0286                                     | 0.0200                                 | 0.2757    | 1 | ○        |
| Tourism                           | 0.0536                      | 0.0000                        | 0.0143                                     | 0.0200                                 | 0.0879    | 4 |          |
| Public-Private Partnership        | 0.0000                      | 0.0000                        | 0.0000                                     | 0.0000                                 | 0.0000    |   | ○        |

Source: Survey Team

## (2) Sensitivity analysis

### 1) Analysis case settings

Based on the above methodology, the following case settings were made.

**Table 23-9 Sensitivity Analysis Case-based Weighting Settings (Trinidad and Tobago)**

|  | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|--|-----------|------------------------|------------------------|------------------------|
| Economic indicator analysis  | 0.6       | 0.6                    | 0.5                    | 0.5                    |
| Investigation and arrangement of various policies for COVID-19 taken by the government | 0.2       | 0.1                    | 0.1                    | 0.1                    |
| Development partner survey results   | 0.1       | 0.2                    | 0.2                    | 0.3                    |
| Country-specific development cooperation policy  | 0.1       | 0.1                    | 0.2                    | 0.1                    |

Source: Survey Team

### 2) Summary of sensitivity analysis

The results of each sensitivity analysis are as summarized below. Sensitivity analysis did not show much change, which was close to the result of the base case.

**Table 23-10 Summary of Sensitivity Analysis Results (Trinidad and Tobago)**

|                                   | Base case | Sensitivity analysis 1 | Sensitivity analysis 2 | Sensitivity analysis 3 |
|-----------------------------------|-----------|------------------------|------------------------|------------------------|
| Social and economic policy        |           |                        |                        |                        |
| Health care / nutrition           | 55        | 5                      | 5                      | 5                      |
| education                         | 6         | 6                      | 6                      | 6                      |
| Agriculture / rural development   | 3         | 3                      | 4                      | 4                      |
| Manufacturing industry            | 2         | 2                      | 2                      | 2                      |
| Environment / disaster prevention |           |                        |                        |                        |
| Governance and citizen security   |           |                        |                        |                        |
| DX / Innovation                   |           |                        |                        |                        |
| Infrastructure and Energy         | 1         | 1                      | 1                      | 1                      |
| sightseeing                       | 4         | 4                      | 3                      | 3                      |
| Public-private partnership        |           |                        |                        |                        |

Source: Survey Team

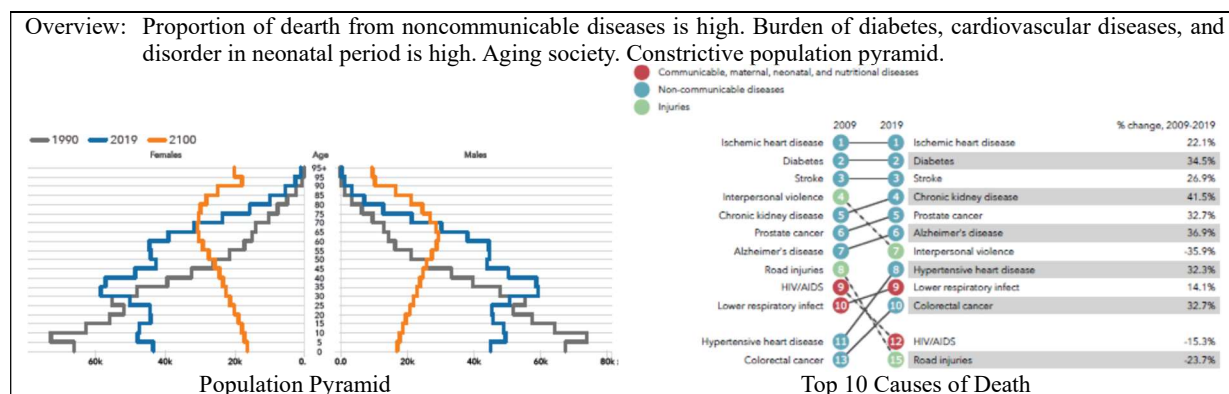
### **(3) Selection of priority sectors by country**

From the above results, 1) social / economic policy, 2) agriculture / rural development, 3) manufacturing industry, 4) environment / disaster prevention, 5) governance / citizen security, 6) DX / innovation, 7) infrastructure / energy, 8). Tourism, 9) public-private partnership are selected as priority sectors.



## 23.3 Country-specific information by sector

### 23.3.1 Health care / nutrition



| Demography                                      |   |  |  |   |                                       |                                  |
|---|---|--|--|---|---------------------------------------|----------------------------------|
| Population                                      | Urban population (%)                      | Urban population growth (%)              | Life Expectancy (years)                        |   |                                       | Population ≥ 65 (%)              |
| 575,987   | 53.19                                     | 0.37                                     | Male   | Female  | Both                                  | 6.91                             |
| 74.94   | 68.37                                     | 71.57                                    |  |   |                                       |                                  |
| Maternal, Newborn and Child Health              |   |  |  |   |                                       |                                  |
| Total fertility rate                            | Neonatal mortality (per 1,000 livebirths) | Under 5 mortality (per 1,000 livebirths) | Maternal mortality (per 100,000 livebirths)    | Antenatal care ≥ 4 (%)                          | Immunization (1yr)                    |                                  |
| 2.42  | 11.60                                     | 18.50                                    | 67   | 100   | DTP (%)                               | MCV1 (%)                         |
| 99  | 90  |  |  |   |                                       |                                  |
| Nutrition                                       |   |  | Health Finance                                 |   |                                       |                                  |
| Under 5 Children                                |   | Adult overweight (%)                     |  | Current health expenditure per capita (USD PPP) | Current health expenditure to GDP (%) | Out-of-pocket expenditure (%)    |
| Stunting (%)                                    | Overweight (%)                            | Male                                     | Female   | 2,206   | 6.93                                  | 40                               |
| 9.2   | 11.4                                      | 26                                       | 29   |   |                                       |                                  |
| Health Service Provision (per 1,000 population) |   |  | COVID-19 related Indicators as of January 2022 |   |                                       |                                  |
| Hospital beds                                   | Doctors                                   | Nurses                                   | Total confirmed cases (per million)            | Total death (per million)                       | Total number of tests (per 1,000)     | People completed vaccination (%) |
| 3.00  | 4.2                                       | 4.1                                      | 74,110.68                                      | 2,320.12  | -                                     | 48.75                            |

Source: Graphs=Institute for Health Metrics and Evaluation, County Profile; Demography, Total fertility rate, Neonatal mortality, under-5 mortality, Health finance= World Development Indicators, the World Bank (Accessed on Aug 2021); Maternal mortality= UNICEF (Sep 2019); Antenatal care, Immunization, Nutrition, Health service provision,= OECD/The World Bank (2020), Health at a Glance: Latin America and the Caribbean 2020; COVID-19 related indicators= Our World in Data (Accessed on Jan 2022)

| Health                                  |   |
|---|---|
| Leadership/ Governance                  | Responsible Agency: Ministry of Health<br><a href="https://health.gov.tt/">https://health.gov.tt/</a><br>Centralized  |
|   | Major Relevant Policies: National Health Agenda is guided by the National Development Strategy, VISION 2030<br>- 'Many Hearts, Many Voices, One Vision'   |
| Service Providing System                | Public sector is the main provider (free of charge). National program provides free medicine of noncommunicable disease diagnosis and treatment both for public and private.  |
| Health Finance                          | Government fund, but high out-of-pocket expenses  |
| Human Resource for Health               | Specialized doctors are not sufficient, while medical interns are over supply.  |
| IT/ Digital Health                      | The government aims to integrate information communication system. There are around 30 private health facilities providing telemedicine to be claimed to private health insurance company (Sargicol: <a href="https://www.sagicor.com/en-tt/telemedicine">https://www.sagicor.com/en-tt/telemedicine</a> ). |
| Drugs/ Medical Equipment                | Standard specification of medical equipment is under development. Local health authorities prepare medical equipment inventory.   |
| Priority                                | Noncommunicable disease prevention and control, infectious disease prevention and control, MNCH, mental health, human resource development, and community and family health   |
| Communicable Disease Emergency Response | Necessary action and responses are undertaken along with IHR.<br>Caribbean Epidemiology Centre (CAREC) under CARPHA is a reference laboratory for English-speaking Caribbean countries.   |
| Major Development Partners              | PAHO/WHO, Un agencies   |
| Nutrition                               |   |
| Institutional Arrangement               | (No information)  |
| Major Relevant Policies                 | Food and Nutrition Policy for Trinidad & Tobago   |

|                           |   |
|---------------------------|---|
| Human Resource for Health | Nutrition related degrees: Yes<br>Nutrition related subjects in pre-service education: Yes<br>Number of nutrition related professionals: 2.4 per 100,000 population |
|---------------------------|---|

Source: Survey Team with reference to WHO Country Cooperation Strategy for Trinidad and Tobago at a glance, May 2016, Institute for Health Metrics and Evaluation, County Profile, The Borgen Project, Healthcare in Trinidad and Tobago, August 2020, and WHO, Nutrition Landscape Information System (NLiS)

### 23.3.2 Education

| Overview  |  |   |               |                 |                 |               |
|---|--|---|---------------|-----------------|-----------------|---------------|
| Number of children  | Education level  | Preschool   | primary       | Lower secondary | Upper secondary |               |
|   |  | 33,908 people   | 86,547 people | 47,119 people   | 36,435 people   |               |
|   | Number of schools  | 476 schools   |               | 134 schools     |                 |               |
| Source: Institute for Statistics (UIS), UNESCO Bureau of Statistics |  |   |               |                 |                 |               |
| Government authority  | Ministry of Education  |   |               |                 |                 |               |
| Education indicator   | N / A  |   |               |                 |                 |               |
| Learning achievement survey   | PISA (Program for international student assessment) in 2015, the learning achievement test for 7th graders (equivalent to 1st grade lower secondary school students) was 427 points for reading comprehension, 417 points for mathematics, and 425 points for science, which is lower than the average for OECD countries (490 points).    |   |               |                 |                 |               |
| Impact of COVID-19  |  |   |               |                 |                 |               |
| School closure / reopening  | According to UNICEF, 90 days were completely closed and 73 days were partially closed between March 11, 2020 and February 2, 2021. From March to July 2021, the remote style lessons were held, the vacation from July was extended, and from October to November, hybrid style lessons combined remote and face-to-face lessons are held. |   |               |                 |                 |               |
| COVID-19 measures   | N / A  |   |               |                 |                 |               |
| Distance education  | Implementation status  | Ministry of Education opens a portal site. The learning management system is based on Moodle, and two-way dialogue and lessons are also possible. Distribution of digital lessons through Google Classroom, etc., and implementation of educational program via TV and radio. Distance Education Readiness Index published by UNICEF is Level 2 "Some children / students can benefit from distance education, but due to several factors, the majority of the country does not have access to distance education." |               |                 |                 |               |
|   | Access   | School-aged children / students who can connect to the Internet at home (%) (2011)  |               |                 |                 |               |
|   |  |   | Rural area    | Urban area      | Poor Class      | wealthy class |
|   | Whole school age   | 34  | 52            | 3               | 96              | 44            |
|   | Primary Education  | 32  | 51            | 2               | 97              | 42            |
|   | Lower secondary education  | 38  | 54            | 4               | 93              | 47            |
|   | Upper secondary education  | 41  | 60            | 7               | 97              | 51            |
|   | Source: UNICEF Global database on school-age digital connectivity<br>According to IDB, all lower secondary schools can connect to the Internet, but primary schools' connection rate is 25 to 30%.   |   |               |                 |                 |               |
|   | Teacher training   | N / A   |               |                 |                 |               |
| School hygiene  | Infection control measures   | Formulation of guidelines for reopening schools   |               |                 |                 |               |
|   | Facility maintenance   | N / A   |               |                 |                 |               |
| School lunch / nutrition  | N / A  |   |               |                 |                 |               |
| Countermeasures for vulnerable people                               | N / A  |   |               |                 |                 |               |
| Support for donors, etc.  | N / A  |   |               |                 |                 |               |

Source: Survey Team

### 23.3.3 Agriculture / rural development

|   |  |           |          |          |          |          |
|---|--|-----------|----------|----------|----------|----------|
| Urban / rural population ratio                    | 53.2% / 46.8% (FAOSTAT 2018)   |           |          |          |          |          |
| Agricultural land area                            | 54,000 ha (FAOSTAT 2019) 1)  |           |          |          |          |          |
| Agricultural sector employment                    | 3.2% of all employment (male / female ratio: 79.5% / 20.5%) (FAOSTAT 2016) 2)  |           |          |          |          |          |
| Agricultural GDP                                  | 1.2% of total GDP (World Bank 2020)  |           |          |          |          |          |
| Of the agricultural sector Value added amount     | \$ 242,330.25 thousand (World Bank 2020) 3) * Statistics include forestry  |           |          |          |          |          |
| Agricultural sector expenditure ratio             | Ratio of agricultural fiscal expenditure to national budget (%) 4)   |           |          |          |          |          |
|   | 2018   | 2019      | 2020     |          |          |          |
|   | 1.19   | 1.07      | 1.11     |          |          |          |
| Agricultural sector import / export balance       | Trade Balance (USD1,000 FAOSTAT) 5)  |           |          |          |          |          |
|   |  | 2015      | 2016     | 2017     | 2018     | 2019     |
|   | export   | 398,178   | 274,373  | 262,184  | 201,433  | 279,952  |
|   | Import   | 1,043,283 | 906,843  | 919,228  | 875,434  | 881,464  |
|   | Balance of payments  | -645,105  | -632,470 | -657,044 | -674,001 | -601,512 |
| Agricultural development Policy / plan / strategy | <p>Total food imports for the first nine months of 2015 were close to \$ 646.8 million, or 9.3% of total imports (CBTT 2015) 6). Trinidad and Tobago is a pure food importer, and its dependence on food has increased from about 60% in 2000 to 85% in 2015.</p> <p>The Strategic Plan 7), led by the Ministry of Land, Infrastructure, Transport and Tourism (MFPLMA) to promote the sustainable use and conservation of agricultural and fishery resources, will be the latest in the 2011-2015 edition, which can be found on the MFPLMA official website. It consists of the following six strategic pillars. 1) Respect for agriculture, farmers and land. 2) Sustainably affordable food provision. 3) Sustainable livelihood for farmers. 4) Fusion of existing systems and technology-driven platforms. 5) Regional and extra-regional joint ventures to achieve economic scale expansion and improved export competitiveness. 6) R &amp; D and functional collaboration between sectors to enhance the application of knowledge.</p> <p>The following are set as the strategic goals of the plan. 1) Respect for agriculture and the environment, empowerment of stakeholders, building social capital for sustainable agriculture and rural development, 2) Expanding productive employment opportunities for small producers, including women and young people Improving social conditions, 3) Efficient, profitable and competitive agribusiness enterprises and industry development, 4) Transparency, coordination, results-based agricultural system framework, 5) Agriculture, fisheries, Securing profits for food production.</p> <p>The Caribbean Agricultural Research and Development Institute (CARDI), of which Trinidad Tobago is a member, is a five-year roadmap for research and development aimed at improving the competitiveness and sustainability of the regional agricultural sector. Strategic plan 2018-20228) is being prepared. This strategic program focuses on products identified as economically important to the CARICOM region, while maintaining consistency and coordination with each country's unique strategic plans and policies, regional strategies and policies, global strategies and policies. I'm guessing. CARDI divides its member countries into three groups from the aspect of strategic approach according to the economic structure of each country, and Trinidad and Tobago belongs to the second group. The group's strategy is to introduce a centralized system with high capital input provided by partnerships with the private sector, including agritourism and industrial development to complete added value within the value chain.</p> |           |          |          |          |          |
| Impact of COVID-19                                | <p>From Trinidad and Tobago Central Bank data (CBTT 2020) 9), the GDP growth rate (%) for 2016-2019 is -5.6 (2016), -3.0 (2017), 0.1 (2018), -1.2 (2019). The growth rate (%) of the agricultural sector was -7.3 (2016), 7.9 (2017), -9.6 (2018), and -3.3 (2019). The economic recession in 2016 was due to lower activity in the energy sector of crude oil and natural gas and low energy prices<sup>10</sup>), which also affected agriculture as a non-energy sector. In 2018, there was a significant decline in the agricultural sector, with an overall economic recovery. Although it is generally said that the weather conditions were better (in some areas, heavy rain flood damage caused by the Intertropical Convergence Zone has occurred <sup>11</sup>), the cause of the decrease this year was the outbreak of pests and diseases. , Labor shortage, water management problems, soil erosion <sup>12</sup>). In this way, agricultural production in Trinidad and Tobago tends to be influenced by the relationship with the energy sector, labor problems, etc., and since the agricultural scale itself is originally small, it seems to be a fragile industry. Although there was negative growth in the pandemic, there was a tendency for recovery from the previous year.</p> <p>According to a questionnaire survey conducted by the World Food Program (WFP) in June 2021<sup>13</sup>), the availability of major products on the market has improved. Since the beginning of the pandemic, staple foods and hygiene products have been universally available, and the same is true for fresh</p>  |           |          |          |          |          |

|                    |   |
|--------------------|---|
|                    | foods, showing a trend of improvement. However, most respondents (80%) reported observing higher-than-normal food prices.   |
| Source / reference | <p>1) FAOSTAT-Land, Input and Sustainability-Land Use-Area-Agriculture (<a href="https://www.fao.org/faostat/en/#data/RL">https://www.fao.org/faostat/en/#data/RL</a>)</p> <p>2) FAOSTAT- Share of employment in agriculture (% of total employment) &amp; Share of female employment in agriculture (% of employment in agriculture) (<a href="https://www.fao.org/faostat/en/#data/OE">https://www.fao.org/faostat/en/#data/OE</a>)</p> <p>3) Agriculture, forestry, and fishing, value added (constant 2015 US \$) --Latin America &amp; Caribbean (<a href="https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart">https://data.worldbank.org/indicator/NV.AGR.TOTL.KD?locations=ZJ&amp;view=chart</a>)</p> <p>4) FAOSTAT-Government Expenditure-Share of Total Expenditure-Central Government (<a href="https://www.fao.org/faostat/en/#data/LG">https://www.fao.org/faostat/en/#data/LG</a>)</p> <p>5) FAOSTAT-Trade-Crops and livestock products-Import / Export Value-Agricultural Products (<a href="https://www.fao.org/faostat/en/#data/TCL">https://www.fao.org/faostat/en/#data/TCL</a>)</p> <p>6) ANNUAL ECONOMIC SURVEY 2015, CBTT (<a href="https://www.central-bank.org.tt/sites/default/files/reports/Annual%20Economic%20Survey%202015_0.pdf">https://www.central-bank.org.tt/sites/default/files/reports/Annual%20Economic%20Survey%202015_0.pdf</a>)</p> <p>7) Ministry of Food Production, Land and Marine Affairs (MFPLMA) Strategic Plan 2011-2015 (<a href="http://faolex.fao.org/docs/pdf/tri180159.pdf">http://faolex.fao.org/docs/pdf/tri180159.pdf</a>)</p> <p>8) CARDI's Strategic Plan 2018-2022 (<a href="http://www.cardi.org/wp-content/uploads/downloads/2018/05/CARDI-Strategic-Plan-2018-to-2022-Final.pdf">http://www.cardi.org/wp-content/uploads/downloads/2018/05/CARDI-Strategic-Plan-2018-to-2022-Final.pdf</a>)</p> <p>9) ANNUAL ECONOMIC SURVEY 2020 (<a href="https://www.central-bank.org.tt/sites/default/files/reports/2020-annual-economic-survey_1.pdf">https://www.central-bank.org.tt/sites/default/files/reports/2020-annual-economic-survey_1.pdf</a>)</p> <p>10) Economic Survey of Latin America and the Caribbean 2016, CEPAL (<a href="https://repositorio.cepal.org/bitstream/handle/11362/40327/1600547EE_TrinidadTobago_en.pdf">https://repositorio.cepal.org/bitstream/handle/11362/40327/1600547EE_TrinidadTobago_en.pdf</a>)</p> <p>11) CAMBIO CLIMÁTICO PONE EN JAQUE A LA AGRICULTURA DE TRINIDAD Y TOBAGO, 2018, IICA (<a href="https://www.iica.int/es/prensa/noticias/cambio-climatico-pone-en-jaque-la-agricultura-de-trinidad-y-tobago">https://www.iica.int/es/prensa/noticias/cambio-climatico-pone-en-jaque-la-agricultura-de-trinidad-y-tobago</a>)</p> <p>12) Review-Of-The-Economy-2018 (<a href="https://www.finance.gov.tt/wp-content/uploads/2019/02/Review-Of-The-Economy-2018.pdf">https://www.finance.gov.tt/wp-content/uploads/2019/02/Review-Of-The-Economy-2018.pdf</a>)</p> <p>13) Trinidad and Tobago COVID-19 FS &amp; L Impact Survey Report (<a href="https://docs.wfp.org/api/documents/WFP-0000129030/download/">https://docs.wfp.org/api/documents/WFP-0000129030/download/</a>)</p> |

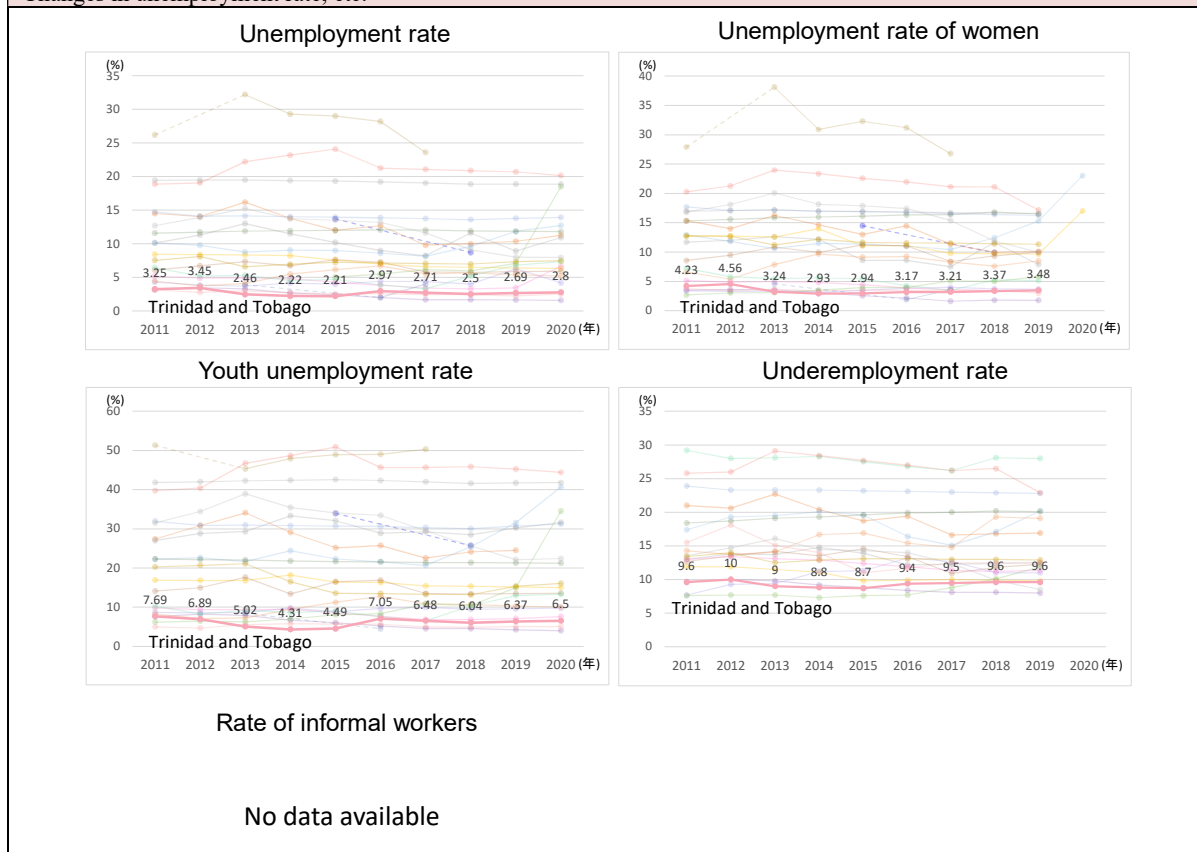
### 23.3.4 Private sector

Trinidad and Tobago is a country with a slightly larger economy (9th) and a high GDP per capita (3rd). Employment-related figures are good, and it is considered to be a country with good economic and employment conditions.

|              | Index                      | Value  | Ranking                   | Year | Source             |
|--------------|----------------------------|--------|---------------------------|------|--------------------|
| Productivity | GDP per capita (USD)       | 15,384 | 3 (Among 22 countries)    | 2020 | World Bank         |
|              | GDP per worker (USD)       | 56,011 | 3 (Among 18 countries)    | 2019 | World Bank         |
| Employment   | Minimum wage (USD / month) | 405    | 6 (Among 23 countries)    | 2019 | ILO                |
|              | Unemployment rate          | 2.69   | 3 (Among 22 countries)    | 2019 | Statista           |
|              | Female unemployment rate   | 3.48   | 3 (Among 22 countries)    | 2019 | The Global Economy |
|              | Youth unemployment rate    | 6.37   | Four (Among 22 countries) | 2019 | Statista           |
|              | Underemployment rate       | 9.6    | 3 (Among 18 countries)    | 2019 | ILO                |
|              | Informal worker rate       | —      | — (Among 12 countries)    | —    | —                  |

Source: Described in the table

Changes in unemployment rate, etc.



Source: World Bank, ILO, The Global Economy, etc.

### 23.3.5 Environment / disaster prevention

|                     | item   | data   | remarks                          |
|---------------------|--|--|----------------------------------|
| environment         | Environmental agency                                     | Environmental Management Authority   |                                  |
|                     | Waste-related organizations                              | Solid Waste Management Company Limited (private contractor)                                |                                  |
|                     | Environmental Budget (USD)                               | 2019: 39,852,104<br>2020: 37,232,072<br>2021: 40,710,488<br>Three-year average: 39,264,888 | Average: 5th out of 23 countries |
|                     | Environmental budget per capita (2019-2021 average, USD) | 28.1   | 6th out of 23 countries          |
|                     | Budget ratio to national budget (2019)                   | 0.48%  | 6th out of 23 countries          |
|                     | Government of Japan policy                               | _____  | _____                            |
|                     | Donor support status                                     | 8 cases  | As of May 2021                   |
|                     | COVID-19 impact  | (investigating)  |                                  |
| Disaster prevention | Disaster prevention organization                         | Office of Disaster Preparedness and Emergency Management                                   |                                  |
|                     | Donor support status                                     | 0 cases  | As of May 2021                   |
|                     | Number of natural disasters (2010-2020)                  | 2 cases<br>Major disasters: floods, droughts, storms                                       |                                  |
|                     | Number of victims (persons) per 100,000 population       | 10,722 people  | 9th out of 23 countries          |

Source: Survey Team

### 23.3.6 Governance and citizen security

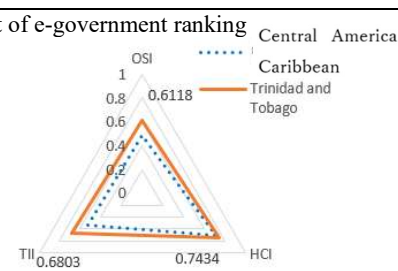
| Item             | Overview  |
|------------------|---|
| Political system | Parliamentary republic  |
| Election system  | The president is indirectly elected by an electoral college of members elected by the Senate and the House of Representatives. The term of office is 5 years. |

| Legislative system                      | Bicameral parliament  |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|---|---|-----------------------------|---------|----------------------------|----------------------------|--------------------------|-----------------------------|------|-----|------|-----|------|-----|---------------------|------|-----|------|-----|------|-----|---|-----------------------------|------|-----|------|-----|------|-----|---------------------|------|-----|------|-----|------|-----|--------------------------|-----------------------------|------|-----|------|-----|------|-----|---------------------|------|-----|------|-----|------|-----|--------------------|-----------------------------|------|-----|------|-----|------|-----|---------------------|------|-----|------|-----|------|-----|-------------|-----------------------------|------|-----|------|-----|------|-----|---------------------|------|-----|------|-----|------|-----|-----------------------|-----------------------------|------|-----|------|-----|------|-----|---------------------|------|-----|------|-----|------|-----|
| Most recent / next legislative election | Senate: September 23, 2015<br>House of Representatives: August 10, 2020 (next time scheduled for 2025)  |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
| Appointment of judicial system / judge  | The Supreme Court justice is appointed by the president after discussions between the prime minister and the leader of the opposition party. Other judges are appointed by the Judicial Legislation Committee, which consists of five members with judicial experience headed by the Chief Justice of the Supreme Court.  |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
| Political stability                     | At the average level of the region, not totally stable  |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
| “Worldwide Governance Indicators” (WGI) | Performance of some indicator such as the “regulatory quality” has deteriorated in the last 10 years.   |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   | <table border="1"> <thead> <tr> <th>Indicator</th> <th>Country</th> <th>Year</th> <th>Percentile Rank (0 to 100)</th> </tr> </thead> <tbody> <tr> <td rowspan="6">Voice and Accountability</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~65</td> </tr> <tr> <td>2019</td> <td>~65</td> </tr> <tr> <td>2020</td> <td>~65</td> </tr> <tr> <td rowspan="3">Trinidad and Tobago</td> <td>2010</td> <td>~65</td> </tr> <tr> <td>2019</td> <td>~65</td> </tr> <tr> <td>2020</td> <td>~65</td> </tr> <tr> <td rowspan="6">Political Stability and Absence of Violence/Terrorism</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Trinidad and Tobago</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="6">Government Effectiveness</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Trinidad and Tobago</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="6">Regulatory Quality</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Trinidad and Tobago</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="6">Rule of Law</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Trinidad and Tobago</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="6">Control of Corruption</td> <td rowspan="3">* Latin America &amp; Caribbean</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> <tr> <td rowspan="3">Trinidad and Tobago</td> <td>2010</td> <td>~55</td> </tr> <tr> <td>2019</td> <td>~55</td> </tr> <tr> <td>2020</td> <td>~55</td> </tr> </tbody> </table> | Indicator                   | Country | Year                       | Percentile Rank (0 to 100) | Voice and Accountability | * Latin America & Caribbean | 2010 | ~65 | 2019 | ~65 | 2020 | ~65 | Trinidad and Tobago | 2010 | ~65 | 2019 | ~65 | 2020 | ~65 | Political Stability and Absence of Violence/Terrorism | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Trinidad and Tobago | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Government Effectiveness | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Trinidad and Tobago | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Regulatory Quality | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Trinidad and Tobago | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Rule of Law | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Trinidad and Tobago | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Control of Corruption | * Latin America & Caribbean | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 | Trinidad and Tobago | 2010 | ~55 | 2019 | ~55 | 2020 | ~55 |
|   | Indicator   | Country                     | Year    | Percentile Rank (0 to 100) |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   | Voice and Accountability  | * Latin America & Caribbean | 2010    | ~65                        |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   |                             | 2019    | ~65                        |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   |                             | 2020    | ~65                        |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | Trinidad and Tobago         | 2010    | ~65                        |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   |                             | 2019    | ~65                        |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   |                             | 2020    | ~65                        |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   | Political Stability and Absence of Violence/Terrorism   | * Latin America & Caribbean | 2010    | ~55                        |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
| 2019                                    |   |                             | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
| 2020                                    |   |                             | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
| Trinidad and Tobago                     |   | 2010                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2019                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2020                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
| Government Effectiveness                | * Latin America & Caribbean   | 2010                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2019                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2020                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   | Trinidad and Tobago   | 2010                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2019                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2020                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
| Regulatory Quality                      | * Latin America & Caribbean   | 2010                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2019                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2020                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   | Trinidad and Tobago   | 2010                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2019                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2020                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
| Rule of Law                             | * Latin America & Caribbean   | 2010                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2019                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2020                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   | Trinidad and Tobago   | 2010                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2019                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2020                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
| Control of Corruption                   | * Latin America & Caribbean   | 2010                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2019                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2020                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   | Trinidad and Tobago   | 2010                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2019                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
|   |   | 2020                        | ~55     |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
| Global freedom status                   | 82/100 points (citizen rights: 33/40 points, political rights: 49/60 points)<br>Classified as "free country" (Freedom House 2021)   |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
| Corruption Perception Index (CPI)       | 86/180th place, 40/100 points (Transparency International 2020)   |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
| Government effectiveness                | According to WGI, it is on the average level of the region.   |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
| E-government development index          | Higher than the regional and global averages. A digital national ID issued. 5.06% (55,000) of the people are not given a national ID.   |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
| Rule of law                             | According to WGI, it has been low since 2006.   |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |
| Citizen security                        | The homicide rate is also higher than the Caribbean region average. The homicide rate in 2015 was 30.6 / 100,000 (the same year, the Caribbean average was 14.4, and the world average was 5.9) (UNODC 2021). Organized crime is the cause of violence.   |                             |         |                            |                            |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |   |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                          |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                    |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |             |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |                       |                             |      |     |      |     |      |     |                     |      |     |      |     |      |     |

Source: Survey Team

### 23.3.7 DX / Innovation

|                                 |   |                                     |
|---------------------------------|---|-------------------------------------|
| Basic indicators and statistics | E-Government Ranking 1): 81st   | Radar chart of e-government ranking |
|                                 | Mobile connection index 2): 64.9  |                                     |
|                                 | Network Infrastructure Index: 44.1  |                                     |
|                                 | Internet user rate 77.3   |                                     |
|                                 | Mobile connection rate 136.0  |                                     |
|                                 | Fixed broadband rate 24.3   |                                     |
|                                 | Increase rate of Internet users 0.3 (2021/2020)   |                                     |
| Communication network           | Trinidad and Tobago's (T & T) telecommunications services were provided exclusively by the T & T Telecommunications |                                     |





Services Company (TSTT). TSTT is operated jointly by the government and the British company C & W, and was established in 1991 as a merger of T & T Telephone Company (TELCO) and T & T External Telecommunications Company (TEXTEL) 3).

The liberalization of the telecommunications industry is under the guidance of the regulatory agency (TATT) 4), which was established in 2004, and competes with TSTT and Digicel, an Irish company that has entered the market since 2005. It is becoming more active.

Six companies (Amplia Communications, Columbus Communications, Digicel, Lisa Communications, Prism Services, TSTT) have entered the fixed voice service, including public switched telephone networks (PSTN), HFC networks, GPON, and hosted PBX telephone systems. Technology is being utilized 5).

The mobile phone service market is oligopolized by two companies, TSTT (brand name bmobile) and Digicel. GSM networks are being phased out as the primary network for voice services, but still in rural areas with a combination of GSM data extensions, General Line Radio Service (GPRS), and GSM Evolved High Speed Data Rate (EDGE). Service is provided. The mainstream is from the UMTS network, which is being deployed for voice services in combination with UMTS data extension, HSPA and HSPA + 5).

For mobile broadband, TSTT launched 4G / LTE services in 2016 and Digicel in 2018, respectively. In 2019, TSTT and Huawei formed a business alliance to announce the trial introduction of a fixed wireless 5G solution 6).

#### National Strategy for Digital Transformation

The National ICT Plan 2018-2022) consists of the following five strategic axes, and programs for achieving each strategy are planned respectively. The program is in line with the National Development Strategy 2016-2030) and the Sustainable Development Goals (SDGs).

- 1) Improved connectivity; providing affordable and secure broadband services for modern modern ICT systems to promote health, education, enterprise and home integration.
- 2) Improvement of human capacity; Utilize e-education and e-learning platforms to improve ICT capacity in schools and companies, utilize human resources bank nets, and promote ICT utilization opportunities and employment.
- 3) Promote digital government; expand public electronic services to citizens and businesses, improve social benefits, promote active data sharing in the public sector, and aim to integrate IT systems
- 4) Promotion of economic development; Development of a portal site (TTBizLink) 9) aimed at actively utilizing e-commerce, e-banking, and e-finance tools, supporting domestic economic activities, and revitalizing trade activities.
- 5) Deploying a digital environment for social benefit; implementing environmental education by utilizing ICT, encouraging teleworking, introducing an ICT ecosystem, electronic waste policy, and green policy

#### Characteristic efforts

The COVID-19 pandemic has forced the process to accelerate the transition to an online government service system, and many services are now available via the digital platform (tconnect10). In addition, the roadmap11) emphasizes the acceleration of work toward the creation of the "Digital First Government," saying that transformation to a digital economy is essential for socio-economic recovery after a pandemic. As a priority, we are working on the creation of electronic IDs for citizens and legal residents, allowing them to work with government services and e-commerce electronic processing, and are designed to replace all existing IDs. ing.

#### source

70. E-Gov-Index: a composite indicator that consists of three indexes (Online Service Index, Telecommunication Infrastructure Index and Human Capital Index), which are equally weighted. It ranges from 0 to 1, with 1 being the most developed.
71. Mobile Connectivity Index: an input index developed by GSMA to measure the performance against the four key enablers of mobile internet adoption – infrastructure, affordability, consumer readiness and content. (<https://www.gsma.com/mobilefordevelopment/wp-content/uploads/2016/06/Mobile-Connectivity-Launch-Report.pdf>)
72. Telecommunications Services of Trinidad and Tobago Limited  
<https://www.tstt.co.tt/corporate-history>
73. Telecommunications Authority of Trinidad and Tobago  
<https://tatt.org.tt/AboutTATT.aspx>
74. [https://tatt.org.tt/DesktopModules/Bring2mind/DMX/API/Entries/Download?Command=Core\\_Download&EntryId=1413&PortalId=0&TabId=222](https://tatt.org.tt/DesktopModules/Bring2mind/DMX/API/Entries/Download?Command=Core_Download&EntryId=1413&PortalId=0&TabId=222)
75. TSTT, Huawei launch FWA '5G' solution in Trinidad and Tobago  
<https://www.commsupdate.com/articles/2019/12/18/tstt-huawei-launch-fwa-5g-solution-in-trinidad-and-tobago/>
76. Trinidad and Tobago's National ICT Plan 2018-2022  
[https://mpadt.gov.tt/sites/default/files/file\\_upload/publications/NICT%20Plan%202018-2022%20-%20August%202018.pdf](https://mpadt.gov.tt/sites/default/files/file_upload/publications/NICT%20Plan%202018-2022%20-%20August%202018.pdf)
77. National Development Strategy 2016-2030  
<https://www.planning.gov.tt/sites/default/files/Vision%202030-%20The%20National%20Development%20Strategy%20of%20Trinidad%20and%20Tobago%202016-2030.pdf>
78. <https://www.ttbizlink.gov.tt/tntcmn/faces/pnu/PnuDisplayContent.jsf>
79. [https://www.tconnect.gov.tt/gort/portal/tconnect/ut/p/a1/04\\_Sj9CPykvsv0xPLMnMz0vMAfGjzOK9A40MTD0tjQ38Aw0sDYcPA1dDUy9jd3NjYEK1IEUBLm7ARW4mhp6elcZGxgYEKfAAdwJKg\\_ODVPP1w\\_Cq8yL1MMBZjOBCvA446C3NCICs9MRwCZJcB2/dl5/d5/L2dBISEvZ0FBIS9nQSEh/?WCM\\_GLOBAL\\_CONTEXT=/gort/wcm/connect/gort+web+content/tconnect/citizen/ applying + for + a + tconnect + id](https://www.tconnect.gov.tt/gort/portal/tconnect/ut/p/a1/04_Sj9CPykvsv0xPLMnMz0vMAfGjzOK9A40MTD0tjQ38Aw0sDYcPA1dDUy9jd3NjYEK1IEUBLm7ARW4mhp6elcZGxgYEKfAAdwJKg_ODVPP1w_Cq8yL1MMBZjOBCvA446C3NCICs9MRwCZJcB2/dl5/d5/L2dBISEvZ0FBIS9nQSEh/?WCM_GLOBAL_CONTEXT=/gort/wcm/connect/gort+web+content/tconnect/citizen/ applying + for + a + tconnect + id)
80. Roadmap for Trinidad and Tobago Post COVID-19 Pandemic  
[https://planning.gov.tt/sites/default/files/Report%20of%20the%20Roadmap%20to%20Recovery%20Committee\\_1st\\_.pdf](https://planning.gov.tt/sites/default/files/Report%20of%20the%20Roadmap%20to%20Recovery%20Committee_1st_.pdf)

### 23.3.8 Infrastructure and Energy

| Transport                  |   |
|----------------------------|---|
| Overview                   | Inland transportation is mainly by car. There are three airports, one of which is on Tobago Island. There is no railroad. |
| Leadership governance      | Ministry of Works and Transport   |
| Major development partners | IADB  |
| Energy and electricity     |   |
| Overview                   | 91% of primary energy is gas and the rest is oil. The energy self-sufficiency rate in 2018 is 201%.                       |



|   |  |
|---|--|
|   | 99.5% of electricity is produced by gas and the rest by oil.   |
| Carbon neutral national plan              | Carbon Emissions Reduction Strategy in Trinidad and Tobago, 2040 (2015)<br>Goals: 1) 15% reduction by 2040, 2) 15% reduction by 2030 (NDC, 2018) |
| Leadership governance and utility company | Ministry of Energy and Energy Industries<br>Trinidad and Tobago Electricity Commission (T & TEC)   |
| Major development partners                | IADB   |

Source: JICA Study Team with reference to various websites of the government organization and international organization (WB / IEA / IRENA / US DOE).

### 23.3.9 Tourism

The energy sector is the main industry, and the impact of COVID-19 on the tourism industry is limited.

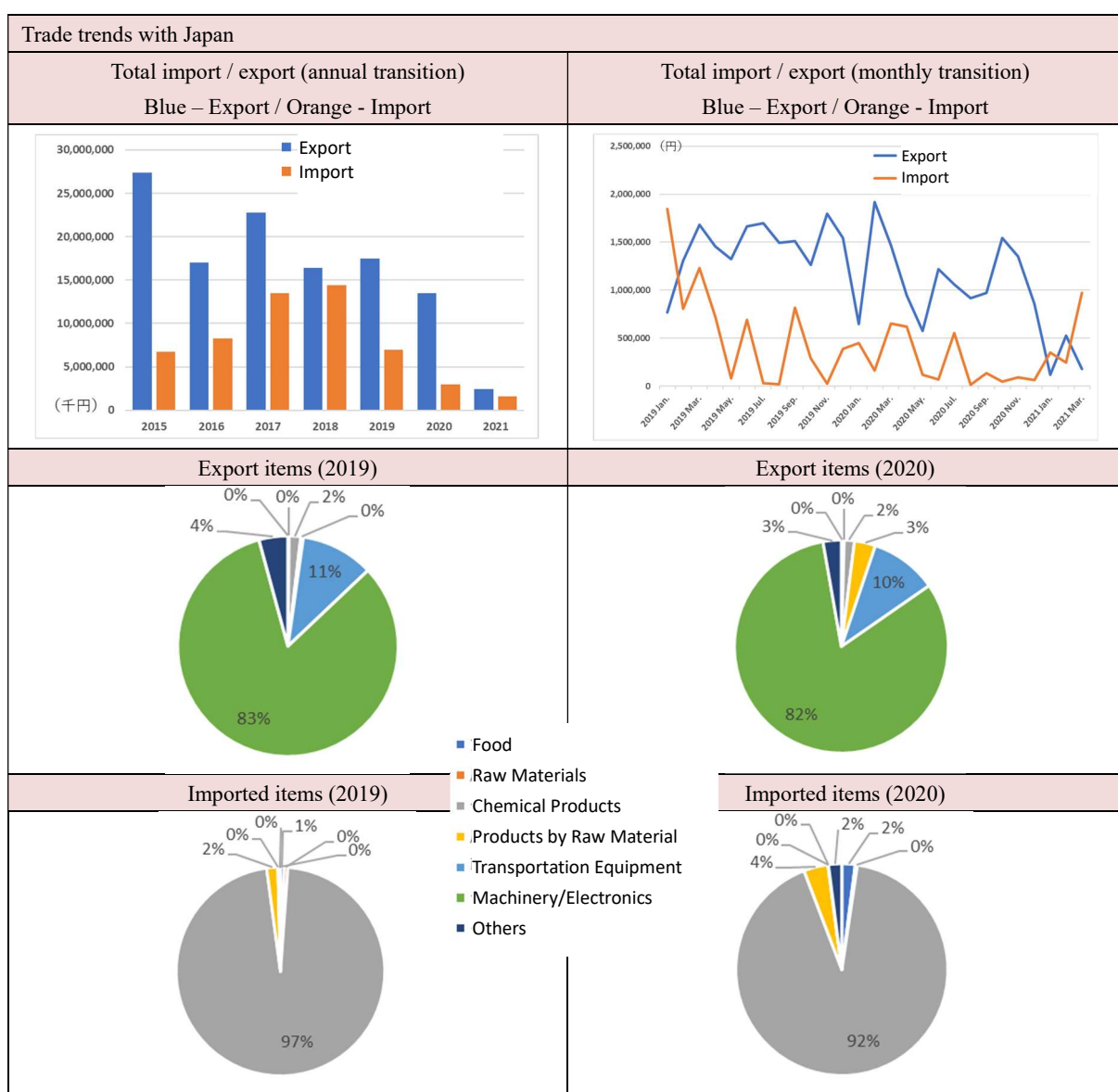
|  |  |  |
|--|--|--|
| Number of international tourist arrivals (2019)              |  | 389 thousand   |
| International Tourism Receipts (2019)                        |  | USD 439 million  |
| Tourism Competitiveness Ranking (2019)                       |  | 3.6 out of 7 (87th out of 140 countries)<br>Highly rated fields: Land transportation and port infrastructure (4.0 out of 7 points, 42nd out of 140 countries)<br>Low-rated fields: Natural resources (2.0 out of 7 points, 131st out of 140 countries) |
| Tourism Dependency Index (2019)                              |  | 7.7 (106th out of 166 countries)   |
| Government of Japan policy                                   | Number of JICA projects in the last 10 years   | none   |
|  | References to the Country Assistance Policy  | none   |
|  | Interest in pilot projects   | N / A  |
| Tourism industry vulnerability                               | Contribution of Travel & Tourism to GDP (2019)   | 7.8% (20th out of 23 countries)  |
|  | Contribution of Travel & Tourism to employment (2019)  | 8.5% (20th out of 23 countries)  |
|  | Ratio of international spending (2019)   | 32% (20th out of 23 countries)   |
|  | Top 3 nationalities of visitors (2019)   | USA (45.81%)<br>Canada (12.74%)<br>UK (8.26%)  |
| Importance of tourism  | Ratio of the budget amount of tourism-related ministries to the national budget amount (2019)            | 0.1% (15th out of 16 countries)<br>National budget: TTD 55,582,977,415<br>Budget of tourism-related ministries: TTD 55,000,000   |
|  | Whether or not it is mentioned as a priority sector in the National Economic and Social Development Plan | none   |
|  | Existence of effective national tourism policies / strategies / plans                                    | Yes (Revised National Tourism Policy 2020-2030 (draft))  |
| Impact of COVID-19   | Changes in the contribution of Travel & Tourism to GDP (2019 → 2020)                                     | -47.8% (22nd out of 23 countries)  |
|  | Changes in the contribution of Travel & Tourism to employment (2019 → 2020)                              | -25.2% (16th out of 23 countries)  |
| Number of government support measures for the tourism sector |  | 6 (Market Information: 1, Resumption of Tourism: 1, Health and Safety Protocols: 1, Others: 3)   |

Source: Survey Team

### 23.3.10 Public-private partnership

|  | item   | Contents |
|--|--|----------|
| No. of JICA Public-Private Partnership Projects (After 2012) | Cooperation preparatory survey (overseas investment and financing) (former PPP infrastructure project)           | 0 cases  |
|  | Overseas investment and loan   | 0 cases  |
|  | SME Partnership Promotion Survey (support for Small-sized Enterprise)  | 0 cases  |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for small- and medium- sized enterprise) | 0 cases  |
|  | SDGs Business Verification Survey with Private Sector (support for small- and medium- sized enterprise)          | 0 cases  |
|  | SDGs Business Model Formulation Survey with the Private Sector (support for                                      | 0 cases  |

|  |  |             |
|--|--|-------------|
|  | large enterprise)  |             |
|  | SDGs Business Verification Survey with Private Sector (support for large enterprise)                           | 0 cases     |
| Total number of Japanese private companies entering the market (2019 survey) | Total number of business locations   | 7 companies |
|  | Overseas branches of Japanese companies,   | 0 companies |
|  | Local corporations wholly owned by Japanese companies and their branches                                       | 3 companies |
|  | Branch offices wholly owned by Japanese companies and their branches   | 0 companies |
|  | joint ventures (local corporations in which Japanese companies have a direct or indirect stake of 10% or more) | 2 companies |
|  | joint ventures (Branch offices in which Japanese companies have a direct or indirect stake of 10% or more)     | 0 companies |
|  | companies established overseas by Japanese nationals (in which Japanese nationals have a stake of 10% or more) | 2 companies |
|  | Unknown classification   | 0 companies |
| Number of Japanese residents (2020 survey)                                   | Total  | 106 people  |
|  | Long-term residents  | 97 people   |
|  | Permanent resident   | 9 people    |
| Business Environment   | Doing Business 2020 Rank   | 105th place |
| PPP Project  | Existence of PPP law scheme  | ○           |
|  | PPP project with Japanese companies  | 0 cases     |



Gathering information about the PPP system

| N°  | Task Item   | Inquiries/comments/status<br>Title of submitted file   | Source/URL   |
|-----|---|--|--|
| 1   | <b>PRIORITY 4_PPP Sector</b>  |  |  |
| 1.1 | PPP Projects in selective countries<br>PPP rules and regulations in Central America and Caribbean Countries |  | All below can be useful  |
| A   | PPP laws and Regulations<br>if there is any, when, and how  | PPP Policy (Draft) 2012<br><br>Trinidad and Tobago Act No.1 of 2015 (Public Procurement Act)   | <a href="https://library.pppknowledgegab.org/documents/2407/download?ref_site=kl">https://library.pppknowledgegab.org/documents/2407/download?ref_site=kl</a><br><br><a href="http://www.news.gov.tt/archive/E-Gazette/Gazette%202015/Acts/Act%20No.%201%20of%202015.pdf">http://www.news.gov.tt/archive/E-Gazette/Gazette%202015/Acts/Act%20No.%201%20of%202015.pdf</a>   |
| B   | PPP Unit Organization<br>if there is any, how structured  | The PPP Ministerial Committee consists of the Ministers with the following portfolios: Finance, Planning and the Economy, Education, Health, Housing and the Environment, Public Utilities, Transport, Works and Infrastructure. Other Ministers may join the Committee when projects under their portfolios are being considered or implemented as PPPs. And the Ministry of Finance has established a PPP Unit to act as Secretariat to the PPP Ministerial Committee in managing the PPP Program.   | <a href="https://library.pppknowledgegab.org/documents/2407/download?ref_site=kl">https://library.pppknowledgegab.org/documents/2407/download?ref_site=kl</a>  |
| C   | PPP sectors<br>in what sectors are the PPPs allowed   | No limitations are mentioned for any sector for the development of PPPs  |  |
| D   | Proposal Types (Solicited or Unsolicited)<br>unsolicited  | Not specified  |  |
| E   | PPP Forms<br>BOT, BTO, DB, ..., what form are allowed   | They have been made in the form: DBF, BOO, BOLT, LDO, DCMF   | <a href="https://www.infrascopes.edu.com/wp-content/uploads/2019/04/EIU_2019-IDB-Infrascopes-Private-Public-Partnerships.pdf">https://www.infrascopes.edu.com/wp-content/uploads/2019/04/EIU_2019-IDB-Infrascopes-Private-Public-Partnerships.pdf</a><br><br><a href="https://www.central-bank.org.tt/sites/default/files/page-file-uploads/Public-Private-Partnerships-in-Trinidad-and-Tobago.pdf">https://www.central-bank.org.tt/sites/default/files/page-file-uploads/Public-Private-Partnerships-in-Trinidad-and-Tobago.pdf</a> |
| F   | PPP types<br>Availability payment, service purchase   | Not specified  |  |
| G   | PPP Project Trends<br>how much PPP projects in the last 10 years  | 02 (2010 to 2020)<br>- Seven Seas Trinidad (2013)<br>- Mahogany Court 2016   | <a href="https://www.central-bank.org.tt/sites/default/files/page-file-uploads/Public-Private-Partnerships-in-Trinidad-and-Tobago.pdf">https://www.central-bank.org.tt/sites/default/files/page-file-uploads/Public-Private-Partnerships-in-Trinidad-and-Tobago.pdf</a>  |
| H   | Participation of Japanese firms in PPP Projects<br>if any (check news source)                               | Article: Public-Private Partnerships in Trinidad and Tobago<br><br>One of the first ever PPP ventures in Trinidad and Tobago, The Power Generation Company of Trinidad and Tobago Limited (PowerGen), was established in 1994, with the partial divestment of the generation assets of the government-owned Trinidad and Tobago Electricity Commission (TTEC). The state, through TTEC, maintained a golden share (51.0 per cent), with Japanese private investor Maru Energy (Trinidad) LLC owning 39.0 per cent, and majority-owned state company National Enterprises Limited (NEL) Power Holdings Limited (NPHL) owning the remaining 10.0 per cent.<br>Page 8 | <a href="https://www.central-bank.org.tt/sites/default/files/page-file-uploads/Public-Private-Partnerships-in-Trinidad-and-Tobago.pdf">https://www.central-bank.org.tt/sites/default/files/page-file-uploads/Public-Private-Partnerships-in-Trinidad-and-Tobago.pdf</a>  |
| I   | Any notable points for each country<br>if any   | Article: Trinidad and Tobago look to public-private partnerships to address infrastructure deficit   | <a href="https://oxfordbusinessgroup.com/analysis/unlocking-potential-country-looking-public-private-partnerships-address-its-infrastructure-deficit">https://oxfordbusinessgroup.com/analysis/unlocking-potential-country-looking-public-private-partnerships-address-its-infrastructure-deficit</a>  |

Source: Survey Team