

DASHBOARD: APRIL 2021

Version 1.0

Issues	Indicators	Frequency	Status		Issues	Indicators	Frequency	Status		
Employment	Jobs	Formal Sector ¹	Monthly	711,474 (8.5%)	▲	Productivity	Literacy Rate (Grade 6)	Yearly (-1)	51.9%(1.2)	▼
		Informal Sector	Yearly (-3)	8,824,252	▲		Numeracy Rate (Grade 6)	Yearly (-1)	52.6%(1.3)	▲
		Migrant Workers	Monthly ⁸	11,114 (28.2%)	▲		Morbidity Rate (Malaria Incidence) ^a	Monthly	2.2 (20.0%)	▲
		LIPW ² (Average)	Monthly	98,783 (-)	▲		PIP Budget Absorption ^b (GoU, IFMS %)	Quarterly (-1)	N/A	▲
	Incomes	Per-capita GDP (US\$): 2020/21	Yearly (0)	910 (2.9%)	▲		Power Tariff (Ushs per Unit)	Medium	Quarterly	556(0.73%)
		Income Poverty (%)	Yearly (-1)	21.4%	▲	Large		361.0 (0%)	▲	
Remittances (US\$,M)		Yearly	1,456 (11.4%)	▲	Extra Large	301.7 (0%)		▲		
Living Standards	Utilities (Retail Tariff Rates)	Water (M ³)	Quarterly	3,516 (0%)	▲	Av. Freight Costs (US\$, Mom-Kla, 40ft)	Monthly	3,800 (0%)	▲	
		Power/Domestic	Quarterly	750.9 (0%)	▲	Commercial Case Backlog ^c	Yearly (-2)	1,766 (88%)	▲	
		Data (Ushs, 1GB)	Monthly	5,000*	▲	Fuel Prices (Liquid Energy Fuel Inflation)	Monthly	0.2(2.5%)	▲	
	Education Expenditure ³ (HH,Ushs)	Yearly (-3)	1,179,000(-)	▲	Customs Clearance (Hours)	Monthly	5.13 (0%)	▲		
	Healthcare Expenditure (HH, Ushs)	Yearly (-3)	273,000(-)	▲	Transit Times (Mom-Kla, Days)	Monthly	9 (0%)	▲		
	Food Inflation ¹ (%)	Monthly	0.7 (-2.0)	▼	Investment Registration (Days)	Yearly	2	▲		
	EFU ⁴ Inflation (%)	Monthly	-0.4 (-1.5)	▼	Business Registration (Days)	Yearly	3	▲		
	Residential Property Price Index (RPPI) for GKMA	Quarterly	3.3 (43.1%)	▼	Electricity Connection (Days)	Monthly	30 (0%)	▲		
	Crime Rate (per 100,000):2020	Yearly	502(8.9%)	▼	Water Connection (Days)	Monthly	3 (0%)	▲		
	Equity and Economic Inclusion	Private Pension: Active Members ^h	Quarterly	644,000 (0%)	▲	Tax Refund (Months)	Monthly	N/A	▲	
Private Pension: Registered Members		Yearly	2,000,000+(Est)	▲	Communication Rates	Voice (Ushs Per Sec)	Quarterly	3 (0%)	▲	
Public Pension (Beneficiaries)		Monthly	81,403 (0.7%)	▲	Data ^d (Unlimited)	Monthly	320.000(3%)	▲		
SAGE (Beneficiaries)		Quarterly	304,555 (0%)	▲	Markets and Regulations	IMF Primary Commodity Price Index	Monthly	144(2.1%)	▲	
Agent Banking (Transactions)		Quarterly	N/A	▲		Average Monthly Net Salary (After Tax) ^f	Yearly	628,611	▲	
Environmental Sustainability	Water Quality (PM _{2.5}) ⁸	Monthly	Low, 15.91	▼		Retail Sales/EFRIS ⁵	Monthly	-37.0% (-)	▲	
	Air Quality (PM _{2.5}) ⁸	Monthly	High, 62.0(21%)	▲		USE All Share Price Index	Monthly	1,394(0.2%)	▲	
	Noise Pollution (Decibels, Kampala)	Monthly ^f	High, 63.6(0.0%)	▲		New Business Registrations	Monthly	N/A	▲	
	Seasonal Changes in Rainfall	Monthly	Normal Plus	▲	Local Content	Hotel Occupancy Rate ^e (Kla)	Quarterly	44% (37%)	▲	
	Natural Disaster Incidences	Monthly	N/A	▲		Plant Utilisation Rates	Quarterly	26-50%	▼	
				MUG Shelf-Presence ⁶		Annually	48% (8.0)	▲		
				Trade Balance ^h (US\$, Millions)		Monthly	-216(42%)	▼		
				Contracts Awarded to Local Providers ⁷		Yearly	97.5%	▲		

*Unless indicated all quarterly figures are for Q2, FY2020/21 and annual figures for FY2019/20 | ¹ Active PAYE Register Jobs | ² Labour Intensive Public Works | ³ Primary Education | ⁴ Energy, Fuel and Utilities | ⁵ Electronic Fiscal Receipting and Invoicing System | ⁶ Made in Uganda (MUG) | ⁷ By Value (and 99.8 by number -2,595) | ⁸ Particulate Matter (April 2020) | ^a Cases per 1,000 population | ^b Cumulative Absorption in Q1 (31st Sep, 2020) | ^c 2019 | ^d Unlimited (Monthly) | ^e May 2020 | ^f July 2020 | ^g June 2020 | ^h National Average is Ushs 168,000 (2016/17) | ⁸ Migrant Labour in 2021 | ^h NSSF: As at December 2020 | Change: August 2020 Figure was for Annual Food Crops and Related Items; *Market Average of

Emerging Microeconomic Trends and Patterns for Policy Attention in FY 2020/21 and the Medium Term

A) Microeconomic Developments: This Section is a commentary on the eight focus issues of the MIND.

Issue	Market Updates
Employment	Positive changes have been observed in the labour market with the number of migrant workers registering a steady rise since the revival of the labour externalize in early 2021. Migrant labour increased from 8,666 migrant employees in March 2021 to 11,114 in April 2021 ¹ . This labour market outcome is based on the continued easing of the COVID-19 restrictions across the Middle East, the main destination of the migrant workers.
Living Standards	Monthly food inflation decreased from 1.4% in March 2021 to -2.0% in April 2021 mainly due to a significant drop in prices for vegetables and fruits, especially bananas. Monthly EFU Inflation decreased from 0.7% in March 2021 to -1.5% in April 2021 following a reduction in the price of firewood.
Equity and Economic Inclusion	Pension beneficiaries increased from 80,930 persons in March 2021 to 81,403 persons in April 2021, indicating Government's consistent effort towards guaranteeing life-long income streams and income security for beneficiaries.
Environmental Sustainability	Air quality improved in April 2021 to 62 µg/m ³ (PM 2.5) from 66 µg/m ³ (PM 2.5) in March 2021. Though still higher than the recommended WHO ceiling of 25µg/m ³ (PM 2.5), this decline and string of environmental governance reforms highlighted in this edition point to a desired direction of change.
Productivity	The average national monthly incidence of malaria reduced to 1.93 per 1,000 persons in April 2021 from 2.2 per 1,000 persons in March 2021. This is attributed to governments efforts including 'Under the Net' campaign of mosquito net distribution that has seen over 24 million nets distributed.
Competitiveness	Fuel inflation dropped from 0.2% in March to 0.4% in April 2021. Commercial case backlogs also dropped by 36.5 percent between July to December 2020 attributed to reforms instituted to reduce case backlogs. The quarterly power tariff for medium industrial consumers also reduced by 4 cents in Q3 to UShs 556 from 560 in Q2 of FY 2020/21
Markets & Regulation	International commodity prices rose by 2% between March 2021 and April 2021 on account of continued rise in prices of major global commodities such as oil thereby impacting on the cost of production. The All Share Price Index also increased marginally by 0.2% from 1,391 registered in March 2021 to 1,394 in April 2021. This is a pointer to increased investor confidence in the business environment.
Local Content	Trade deficit increased by 42% from US\$ 152.9m in February 2021 to US\$ 216.4m in March, 2021 ² . This increase was driven by a reduction in some major exports like Gold -11%; Maize -44%; and Coffee -6%. This was further exacerbated by increases in imports such as Vegetable Products, Animal, Beverages, Fats & Oil (48%); Plastics, Rubber, & Related Products (35%); Petroleum products (17%); and Machinery Equipment, Vehicles & Accessories (7%)

¹ Ministry of Gender, Labour and Social Development

² Bank of Uganda website

B) Policy Response Measures: This edition of the MIND focuses on Environmental Sustainability as a Thematic Area, with particular emphasis on Air Quality. It highlights policy measures and interventions by Government, including both measures under implementation and consideration to improve air quality.

Objective	Intervention
<p>Environmental Governance</p>	<p>To improve air quality across the country especially in urban areas where it is higher, Government is implementing a range of interventions that are highlighted below:</p> <ul style="list-style-type: none"> a) Development of National Environment Air Quality regulations by NEMA, which will lay out a comprehensive, air quality management programme that will monitor and assess air quality, identify sources of pollution, and establish strategies to meet health-based standards. The draft regulations also establish a permit and compliance programme for industrial sources and associated fees. b) KCCA, with support from the United Nations Environment Program, is currently developing a Kampala Clean Air Action Plan to guide activities for reducing air pollution as well as increase air quality monitoring in the city. The Plan is expected in by end of 2021. c) Makerere University has developed a network of low-cost monitoring devices to watch air pollution in major cities in Uganda. The devices measure particulate matter; a mixture of solid particles in the air – which can have adverse effects on our health when we inhale them. 25 air quality monitors have been installed across Kampala city to collect air quality data. d) Government launched an online portal that will enable policymakers to access customized satellite data on the level of environmental degradation in the country. This is intended to inform evidence-based policy and decision making. e) Government is encouraging stakeholders to undertake simple actions including planting trees and grass in bare areas, and avoiding burning rubbish and idling engines in traffic, adopting cleaner cooking practices, servicing cars in time, and embracing car-sharing and non-motorized transport options.

c) Microeconomic Outlook: The second wave of COVID-19 begun amidst the on-going rollout of the COVID-19 vaccination programme. This wave is reported to be more infectious and also affects the younger generation. Ministry of Health issued new travel restrictions to limit the importation of COVID-19 cases and there is a possibility of another lockdown if the public does not strictly observe SOPs. The lockdown, while saving lives, could have adverse microeconomic effects, and slowdown overall economic recovery especially for businesses affected during the previous lockdown. The eminent conclusion of the transition process to a new Cabinet and Parliament is a welcome confidence booster for the direction of policy and conclusion of outstanding legal reforms that matter for the doing business environment.

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Environmental Health and Competitiveness

Environmental Governance	<p>One of the objectives of the Economic Growth Strategy of the NDP III is ‘Exploiting Natural Resource Endowments with Environmental Protection’. National Environment Act of 2019 also provides for establishment of the environmental standards, including Air quality standards.</p> <p>NEMA is developing National Air Quality Regulations as mandated by the National Environment Act of 2019. These regulations will establish health-based air quality standards. In April 2021, NEMA proposed heavy fines and jail terms to persons who are found guilty of polluting air. The proposal is part of Uganda’s first air quality regulations. The draft regulations include; emission limits for industrial sources, cars, trucks, motorcycles, and other mobile sources, layout odor standards and requirements for indoor air, and address worker’s protection. They also establish a permit and compliance program for industrial sources and associated fees.</p>
Environmental Outcomes and Impacts	<p>Uganda’s National State of the Environment (NSOE) report indicates that air quality is above the WHO recommended levels of 25µg/m. This is especially the case in urban areas. This 13th State of Environment Report themed “Managing the Environment for Climate Resilient Livelihoods and Sustainable Development” aims to inform the public about the state of the environment in the country including the air quality and pollution, the importance of the environment and natural resources in the development process.</p> <p>According to the Water and Environment Sector Performance Report 2019, NEMA carries out regular air quality monitoring during compliance inspections to check on the emission from industrial facilities and to promote ambient air quality across the country. Relatedly, in 2020, Government retooled NEMA with air quality monitoring equipment thus strengthening its capacity for air quality monitoring.</p> <p>Over 30,000 people die annually in the county due to air pollution-related illnesses. The primary atmospheric pollutants in the country are carbon monoxide, particulate matter, nitrogen oxides, volatile organic compounds, polycyclic aromatic hydrocarbons, ozone, and sulfur dioxide. The increase in emission amounts of these pollutants is associated with the rapid industrialisation and urbanisation of developing countries.</p>

MIND is compiled by Economic Development Policy and Research Department (EDP&RD) in the Ministry of Finance, Planning and Economic Development

EDPRD: Simplified, seamless and speedy knowledge services for monitoring, assessment and communication of Uganda’s economic development policy and its results