

DASHBOARD: NOVEMBER 2020*

Version 1.0

| Issues | Indicators | Frequency | Status | | Issues | Indicators | Frequency | Status | | |
|-------------------------------------|--|--|----------------------|---|--------------------------------|-----------------------------------|---|-------------|-------------|-----------|
| Employment | Jobs | Formal Sector ¹ | Monthly | 629,962 (15%) | ▼ | 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 ^g | N/A | | | Morbidity Rate (Malaria Incidence) ^a | Monthly | 3.7 (-5.1%) | ▼ |
| | | LIPW ² | Yearly | 14,790 | ▲ | | PIP Budget Absorption ^b (GoU, IFMS %) | Quarterly | 71.9% | ▼ |
| | Incomes | Per-capita GDP (US\$) | Yearly | 908 (2.7%) | ▲ | | Power Tariff (Ushs per Unit) | Medium | Quarterly | 645.6(0%) |
| | | Income Poverty (%) | Yearly (-3) | 21.4% (0.0) | ▲ | Large | | Quarterly | 0.0% | ▲ |
| Remittances (US\$,M) | | Yearly | 1,306 (5%) | ▼ | Extra Large | Quarterly | | 0.0% | ▲ | |
| Living Standards | Utilities (Retail Tariff Rates) | Water (M ³) | Quarterly | 3,516 | ▲ | Competitiveness | Av. Freight Costs (US\$, Mom-Kla, 40ft) | Monthly | N/A | |
| | | Power/Domestic | Quarterly | 750.9 | ▲ | | Commercial Case Backlog ^c | Yearly (-2) | 1,766 (88%) | ▲ |
| | | Data (Ushs, 1GB) | Monthly | 35,000 | ▲ | | Fuel Prices (Liquid Energy Fuel Inflation) | Monthly | -0.7%(0.5%) | ▼ |
| | Education Expenditure ³ (HH,Ushs) | Yearly (-3) | 1,179,000 | ▲ | Customs Clearance (Hours) | | Monthly | N/A | | |
| | Healthcare Expenditure (HH, Ushs) | Yearly (-3) | 273,000 | ▲ | Transit Times (Mom-Kla, Days) | | Monthly | N/A | | |
| | Food Inflation ⁱ (%) | Monthly | -0.9 (0.8) | ▼ | Investment Registration (Days) | | Yearly | 2 | ▲ | |
| | EFU ⁴ Inflation (%) | Monthly | -0.3 (-0.4) | ▼ | Business Registration (Days) | | Yearly | 3 | ▲ | |
| | Residential Property Price Index (RPPI) for GKMA | Quarterly | 5.8% (8.4) | ▼ | Electricity Connection (Days) | | Monthly | 30 | ▲ | |
| | Crime Rate (per 100,000) | Yearly | 517.7 | ▲ | Water Connection (Days) | | Monthly | N/A | | |
| | Equity and Economic Inclusion | Private Pension: Active Members ^h | Quarterly | 644,000(0.0%) | ▲ | | Tax Refund (Months) | Monthly | N/A | |
| Private Pension: Registered Members | | Yearly | 2,000,000+(Est) | ▲ | Communication Rates | | Voice (Ushs Per Sec) | Quarterly | 3 | ▲ |
| Public Pension (Beneficiaries) | | Monthly | 78,068 (0.1%) | ▼ | Data ^d (Unlimited) | | Monthly | 320.000(3%) | ▲ | |
| SAGE (Beneficiaries) | | Quarterly | 304,555 (4.8%) | ▲ | Markets and Regulations | | IMF Primary Commodity Price Index | Monthly | 115.1(5%) | ▲ |
| Agent Banking (Transactions) | | Quarterly | N/A | | | | Average Monthly Net Salary (After Tax) ^f | Yearly | 628,611 | ▲ |
| Environmental Sustainability | Water Quality (PM ₁₀) ^g | Monthly | Low, 35.19 | ▲ | | | Retail Sales/EFRIS ⁵ | Monthly | N/A | |
| | Air Quality (PM ₁₀) ^g | Monthly | Low, 26.7(7.7) | ▲ | | USE All Share Price Index | Monthly | 1,311(0.4%) | ▲ | |
| | Noise Pollution (Decibels, Kampala) | Monthly ^f | High, 61+ | ▲ | | New Business Registrations | Monthly | N/A | | |
| | Seasonal Changes in Rainfall | Monthly | Normal+Below | ▼ | Local Content | Hotel Occupancy Rate ^e | Quarterly | 10-20%(3.0) | ▲ | |
| | 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 | -252(27%) | ▼ | | |
| | | | | Contracts Awarded to Local Providers ⁷ | | Yearly | 97.7% (0.1) | ▲ | | |

*Unless indicated all quarterly figures are for Q4, FY2019/20 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 | ^d 2019 | ^b Cumulative Absorption in Q1 (31st Sep, 2020) | ^c 2019 | ^e Unlimited (Monthly) | ^f May 2020 | ^h July 2020 | ^g June 2020 | ⁱ National Average is Ushs 168,000 (2016/17) | ^g Cumulative Returnees in 2020 | ^h NSSF: As at June 2020 | Change: August 2020 Figure was for Annual Food Crops and Related Items

Policy Briefs: OCT 2020

COVID-19 Series

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 | Microeconomic Developments by end September, 2020 |
|-------------------------------|--|
| Employment | PAYE monthly returns by employers rebounded to 629,962 in November, up by 15% compared to October. The share of the labour force in paid employment almost doubled in the first decade of Vision 2040, rising from approximately 10% in 2010/11 to over 18% in 2019/20. Over the NDP II period, 7% of households were chronically poor, 10% moved out of poverty while 8% slipped back into poverty. |
| Living Standards | <p>Food Inflation recorded a drop of 1.0 percent for the month of November from the 0.1 percent decrease recorded in October. In FY 2019/20, all regions of the country spent 40% of their expenditure on food except for Kampala (26%). From a medium-term perspective, the following outcomes were registered during NDP II:</p> <ol style="list-style-type: none"> There was a marked decline in the incidence of diarrheal episodes from 20% in 2016 to 11% in 2020. Household access to an improved drinking water source increased from 87% to 92% while access to an improved toilet increased from 65% to 68% The share of households with access to modern electricity (grid and solar) increased from 17.8% to 64.5% while that of households using kerosene declined from 58% to 19% On a negative note, the share of children (6-23months) meeting the required acceptable dietary diversity significantly declined from 30% in 2016 to 11% in 2020. |
| Equity and Economic Inclusion | Enrolment in Q2 for the Social Assistance Grant for Employment (SAGE) crossed the 300,000 milestone to reach 304,555. This is a 4.5% increase compared to the Q1 enrolment level. |
| Environmental Sustainability | The updated Q2 rainfall forecast points to an increased likelihood of near normal to below normal (suppressed) rainfall over most parts of the country. |
| Productivity | According to the World Malaria Report 2020, Africa's Annual Malaria death toll reduced from 680,000 in 2000 to 384,000 in 2019. However, Uganda still has the 3rd highest global burden of malaria, accounting for 5% of the global cases. Uganda is among the 10 countries carrying out the High Burden High Impact (HIHB) approach, aimed at reducing the incidence and prevalence of malaria. This approach and other strategies under Ministry of Health such as 'Under the Net' have seen the incidence of malaria declining for the past four consecutive months and stood at 3.7 per 1,000 population in November 2020. |
| Competitiveness | Electricity Regulatory Authority (ERA) announced new electricity connection fees effective December 2020. This followed temporary changes to the Electricity Connection Policy (ECP) that Government has implemented since 2018. The suspension has resulted in an additional cost of about Ushs 576,773 and Ushs 1,989,135 for a 'no pole' and 'one pole' connection respectively. This will negatively impact on Government's efforts to accelerate access to electricity for both households and industries, and inadvertently affect firm competitiveness. |
| Markets & Regulation | USE All Share Index closed at 1,311 in November, a marginally upturn of 0.4% compared to October. This represents a return to the upward trend seen after the easing of the lockdown. |
| Local Content | The trade balance in October widened by 27% to US\$ 252 million. |

B) Policy Response Measures: Findings from the latest 2019/20 Uganda National Panel Survey (UNPS) reveal significant levels of malnutrition in the country. Nearly 1 in 5 adults is now overweight (17%) and 1 in 10 is obese (8.2%). To address this and other nutritional challenges, Government approved the 2nd Uganda Nutrition Action Plan (2020-2025) in September 2020. The plan provides a coordination framework for ensuring that the country achieves all the SDG 2 Targets related to ending hunger, achieving nutrition and promoting sustainable agriculture as summarized in the table below.

| Objective | Intervention |
|---|--|
| <p>To reduce all forms of malnutrition and increase nutrition specific coverage to at least 80% in children under 5 years of age, adolescents, pregnant and lactating women.</p> | <p>To ensure adequate nutrition as a prerequisite for human development and socio-economic wellbeing, Government is working to:</p> <ol style="list-style-type: none"> a) Scale up maternal, infant, young children and adolescent nutrition services countrywide. Government has continued to promote optimal maternal nutrition for improved maternal health, birth outcome and wellbeing of the newborn. According to the National Information Platform for Nutrition (NIPN), low birth weight is increasing nationally and in all regions. Stunting stands at 1 in 4 children (25%) and severe stunting stands at 9.2% countrywide. <p>For many years, the national focus has been skewed towards promoting and supporting breastfeeding. During the NDP III period, Government will improve nutrition across the lifecycle of mothers: during pregnancy, lactation, young children, beyond breastfeeding, as well as appropriate and safe nutrition for adolescents.</p> <ol style="list-style-type: none"> b) Scale up food fortification efforts and ensure social behavioral change communication for consumption of fortified foods. Government has continued to promote the production and consumption of bio-fortified and industrial fortified foods. During the NDP III period, Government will establish a national food composition database and food based dietary guidelines in order to scale up the production and access of diverse nutrient plants, fisheries and animal source foods. Promoting the consumption of nutrient-enhanced foods with a diversified diet across all stages of life will be at the forefront of Government's agenda. c) Scale up the management of acute malnutrition services of the vulnerable population. Throughout the NDP III period, Government will promote and support vulnerable populations to access a diverse and rich diet. Government will continue providing social security support to the most vulnerable families through interventions such as the Social Assistance Grant for the Elderly (SAGE). Government will also continue strengthening nutrition governance at Central and Local Government levels to create an enabling environment for scaling up nutrition. |

c) Microeconomic Outlook: The onset of the dry season coupled with the slowdown of business activity associated with the post-Christmas season and the heightened SOPs to counter the rising incidences of COVID-19 in the country together point to limited room for growth in household incomes in Q3. The increased cost of electricity connections could also slowdown the pace of rural electrification and transition away from subsistence farming into off farm economic activities that are reliant on modern forms of energy.

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NOV 2020
Infrastructure Financing in the Advent of COVID-19

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|---|--|
| Tourism Infrastructure | <p>The Ministry of Tourism, Wildlife and Antiquities estimates that Uganda’s tourism sector has lost more than US\$2billion (about Ushs 7.4 trillion) due to the COVID-19 pandemic. The African Development Bank recently endorsed a Ushs 262 billion loan to Uganda, part of which will be used to upgrade key tourism roads in Uganda. The money will be used to pave sections of two roads in Southwestern Uganda in order to boost the tourism industry.</p> |
| Sustainable Financing for Energy Infrastructure | <p>Cabinet has approved the establishment of an Energy Infrastructure Fund to aid the establishment and timely execution of electricity projects. The Fund will be used to set up Government infrastructure in the electricity subsector including power generation, transmission and distribution projects as well as any required feasibility studies.</p> |
| Infrastructure Funding under Programme Based Budgeting in the NDP III Period | <p>Five out of the 18 NDP III Programmes listed below directly respond to Government’s infrastructure agenda. These are complemented by major infrastructure interventions under Programme 12: Human Capital Development (construction of schools, health centres and water for production facilities).</p> <ul style="list-style-type: none"> a) Programme 3: Sustainable Development of Petroleum Resources b) Programme 7: Manufacturing c) Programme 8: Integrated Transport Infrastructure & Services; d) Programme 9: Sustainable Energy Development e) Programme 10: Digital Transformation <p>The National Budget Framework Paper for FY 2021/22 allocates a combined share of over 27% of the discretionary budget to the above five infrastructure programmes of NDP III. With more than 1 out of every 4 Ushs under the discretionary budget allocated to infrastructure development, it is evident that closing infrastructure gaps remains high on Government’s lists of priorities even after attracting a large share of resources during the NDP II period (2015/16 to 2019/20).</p> <p>Of the five infrastructure-leaning NDP III Programmes, Programme 8 attracts the largest share of the discretionary budget (20%). Key among the drivers of this large share of the discretionary budget in FY 2021/22 is a rise in the budget for road maintenance to cover additional 10,447 Kilometres of National Roads and 16,035 Kilometres of District, Urban and Community Access Roads (DUCAR); funding for rehabilitation of Kampala-Malaba Metre Gauge Railway line (252 Kilometers) and expansion of URC passenger services within the Greater Kampala Metropolitan Area.</p> |