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From Agenda to Action

Turning Resources into Results for People

Africa Progress Report 2010

ABOUT THE AFRICA PROGRESS PANEL:

The Africa Progress Panel brings together a unique group of leaders under the chairmanship of Kofi Annan. The Panel monitors and promotes mutual accountability and shared responsibility for progress in Africa. Its three focus areas are economic and political governance; finance for sustainable development, including ODA; and MDG achievement – notably in light of climate change. The work of the Panel aims to track progress and draw attention to critical issues and opportunities for progress in Africa.

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SUSTAINABLE ECONOMIC GROWTH AND POVERTY REDUCTION

Africa's vast resources need to be captured for the benefit of its people
Africa's land and natural wealth is immense, and increasing in value. The ongoing discovery of new oil and gas fields and other precious resources makes transparent and effective management even more important. Revenues must be used to promote sustainable and equitable development. We call upon the leaders of countries fortunate enough to be endowed with natural resources to implement commitments such as UNCAC and EITI.

Women need to be given greater access to and control of Africa's resources
Women's access to, control and ownership of resources and revenues from them, whether land, natural or productive, remains inadequate across Africa. The resultant underinvestment in and by women severely hampers both the scope and quality of progress. We call on African leaders to implement plans to improve women's access to and control of resources and revenues.

African countries need to climate-proof their development strategies
Climate change will increase the cost of MDG attainment – in food production, health, water, energy, infrastructure and other areas – and will have disproportionate effects on women and the poor. It cannot be treated as a stand-alone issue. Efforts such as ClimDev need to be accelerated by African and international organizations, including the AfDB, the UN and the World Bank, to support the climate-proofing of development and poverty-reduction strategies, and to prepare bankable, job-creating, low-carbon-energy, infrastructure and other programmes.

Women need to be at the centre of climate-proofed development strategies
Impacts of climate change are not gender neutral. Women bear a major responsibility for household water supply, energy and food security which, combined with inhibitions rooted in traditional roles, their unequal access to resources and limited mobility result in them being disproportionately affected. At the same time, they have proved effective in mobilizing communities to respond to and prepare for climate change and natural disasters. Governments and other stakeholders need to ensure that climate change initiatives build on women's experiences, knowledge and coping capacity.

Investment in agriculture and rural public goods must increase
More than 70 per cent of Africans depend on agriculture for their livelihoods. Yet agriculture is not realizing its potential either as a driver of poverty alleviation and economic growth, or to ensure that everyone has access to sufficient food and a balanced diet. Hunger and chronic malnutrition are widespread, and accelerating climate change threatens to reduce productivity further. We call on Africa's leaders, their international partners, and the private sector to implement CAADP compacts and thereby prioritize investments in agriculture, including by increasing access to markets.

Empowered women are key to increasing agricultural productivity
In Sub-Saharan Africa, women produce up to 80 percent of all basic food products, both for household consumption and for sale. Given the key role of women in the agricultural sector, improving their situation, particularly through bettering their access to productive assets and ownership rights, means progress for the sector and for the economy as a whole. We call on African leaders to prioritise rural women's access to land, including land rights, information, credit and financial support, insurance and extension services.

Models for business engagement should be advertised and scaled up
There is a growing body of experience as to how business can work with governments, development actors and local communities to stimulate entrepreneurship, job-creation, trade, and investment in public goods and services. Practical lessons and emerging opportunities need to be captured by the network of African and international organisations such as Business Call to Action, Corporate Council on Africa, and Frontier 100 that are promoting business engagement in development; these should be used as the basis for incentivising and accelerating public-private partnerships.

African leaders need to harness women entrepreneurship
Women entrepreneurs are playing an increasingly prominent role in many African economies, both formal and informal, despite the many constraints they continue to face. We call on African leaders to implement the recommendations from the African Women's Economic Summit and to ensure a conducive regulatory environment through the inclusion and protection of women in the formal economy. CEOs can do more to harness and develop the skills and energy of the continent's women through overcoming entrenched patterns of employment, promotion, and enumeration practices, increasing the share of women in management and board positions, and promoting skill development.

African leaders need to incentivize connectivity and the use of ICTs
Despite significant progress, Africa still lags behind in terms of both information hardware and the use of information and communication technologies (ICTs) in management, entrepreneurship, development, social networking and accountability. But Africa's "connectivity deficit" also creates opportunities to leapfrog expensive and outdated technology and to learn from experiences elsewhere. We call upon African leaders in both the public and private sectors to advance results-oriented partnerships around plans to connect the continent, including schools, health centres, farmers, local authorities and the media.

Connected women are key to developing strong knowledge economies
Owing to cultural barriers and lower literacy rates, women have less access to ICT than men. Enhancing women's participation in the information economy will result in a range of benefits such as more competitive technology sectors and a better trained workforce. It will also facilitate the development of an information economy and enhance the ability of the poorest and most marginalized people, especially women and girls, to exercise their human rights. We call upon business leaders and regulators to track, encourage, and report on women's access to and use of information and communication technologies.

SOCIAL PROGRESS

Now is the time for a big push on the Millennium Development Goals

Investment in education, health and food security is the basis for economic growth and human security. MDG progress over the next five years can yield enormous social and economic dividends, enabling communities and countries to achieve greater self-reliance. The last decade has seen many successes in progress towards MDG-based targets, including in the most resource-deprived and insecure circumstances. These successes need to be scaled up and replicated, drawing upon proven interventions, harnessing the transformative potential of women's empowerment, information technologies, and new partnerships – with the global South and the private sector. The MDG Summit in September 2010 is the ideal opportunity to mobilize renewed support.

Women need to be given a greater say in development planning

Women and girls are still insufficiently engaged and consulted in the design, management and evaluation of initiatives and programmes that are of direct relevance to them. This is particularly detrimental as meeting gender-specific targets such as those on maternal and child health as well as education are the backbone of MDG achievement. Action by governments, business and civil society to set targets for women's participation at all levels, and to gather and disaggregate data, is needed. This will contribute to MDG achievement, as well as strengthen women's knowledge and exercise of their human rights.

Education is the bedrock of progress

All the available evidence points to the fundamental importance of education as the driver of social, economic and political progress. Great strides have been made in increasing access to primary education, but wide gaps remain both in secondary and tertiary education and in completion rates across the board. Adequate funding for comprehensive national plans is the core issue; We urge African political and other leaders and their international partners to redouble efforts to mobilise resources, notably through the Education for All Fast-Track Initiative.

Educated women will empower Africa

Education for girls has a direct positive impact on their health, social, and work prospects as well as on their families, communities and economies. Education also increases the ability and willingness of women to exercise their rights and participate in decision-making. Significant gender gaps persist at all educational levels. This not only penalises them but is a major brake on Africa's economic development and progress towards the MDGs. Gender-equity laws, policies, and targets in education need to be carefully monitored and publicly communicated including to any by politicians, the media and civil society.

Strategies for economic growth must address poverty and inequality

While the evidence base is thin, and reliable statistical data scarce, it is apparent that inequalities within African countries are increasing and the benefits of economic growth are very unevenly shared. This is both unjust and potentially dangerous. Success in fighting poverty and inequality is essential for durable progress and stability; we call on African leaders to use their armory of fiscal and social policy instruments to prioritise public goods and services that benefit and create opportunities for all citizens.

Gender discrimination is a major brake on development

Societies that discriminate on the basis of gender pay the cost of greater poverty, slower economic growth, weaker governance and lower living standards. The growing feminization of poverty and the long standing inequalities in socio-economic and educational opportunities between women and men need to be urgently addressed. Strategies for growth and poverty reduction need to be designed, implemented and monitored with clear gender equity standards and targets and adequately resourced mechanisms for monitoring, evaluating and publicly communicating progress, including to politicians and the media.

POLITICAL LEADERSHIP AND GOVERNANCE

We need to move from agenda-setting to implementation
Over the last decade, Africa and international partners have put in place many sensible, often visionary agendas, plans and blueprints for action – whether relating to governance, regional integration, or investment in agriculture, health and education. We call on African leaders and their international partners to accelerate the implementation of these plans on the basis of agreed time-bound targets. We call upon Africa's partners to support the prioritization of initiatives and plans rather than encourage their proliferation.

Implementation of plans for women's empowerment need to be prioritised
Advances in policies and legislation have not yet resulted in sufficient progress on gender equality and women's empowerment. Weak institutional capacities and insufficient prioritisation of resources undermine the effectiveness of existing laws. We call on African leaders and their international partners to review and increase the level of resources earmarked for the implementation of policies and plans related to women's rights and empowerment.

Good governance and accountability will determine Africa's future
The quality of governance Is a key determinant in political and social stability, equitable economic growth, and poverty reduction. Systems of financial and political accountability are essential if those in authority are to remain responsive to citizens and ensure that revenues are used for the public good. The right of civil society including the media and citizen's groups to play a watchdog role needs to be legally protected. We call upon African leaders to heed the commitments enshrined in the AU's Constitutive Act and other landmark conventions relating to governance and transparency, notably by cooperating with and implementing the recommendations of NEPAD's African Peer Review Mechanism.

Women improve accountability
Women add value to discussions on policy and the use of resources. As cornerstones of families and communities, women have a keen interest in ensuring that resources are fairly and wisely used. Women tend to be more efficient in managing household budgets, loans and savings, if given the opportunity. They are also highly effective as senior executives in the public and private sectors, bringing fresh and alternative perspectives to men. We call upon government, business and civil society organisations to adopt and implement strategies for ensuring prominent roles for women and where relevant to expand training and recruitment opportunities, including at the most senior levels.

Africa needs to amplify its voice in the international architecture
For a continent with over a quarter of the world's states and a billion people profoundly affected by global dynamics, Africa is underrepresented in many formal and informal international processes, including in new fora emerging in the global South. Where it does have adequate representation, Africa often lacks negotiation capacity and a coordinated position. We call on Africa's leaders to be more assertive in making the case for reform of global governance structures, and to make them more representative, supportive and effective. Negotiation capacities need to be strengthened around concerted positions, notably relating to climate change, trade and the MDG process.

African women must be adequately represented in international fora
If Africa is underrepresented in many formal and informal international processes, Africa's women are even more so. Women need representation at all political levels, including in the international arena. Greater representation of women creates synergies, reduces apathy and ensures that addressing the concerns of the vulnerable remains a high priority. We call on African leaders to prioritise equal representation of women in all sectors of governments and the civil service, both on the domestic and international stage, including in negotiation teams, regional and global missions and delegations.

Regional integration must be accelerated
The last decade has seen an unprecedented deepening of regional cooperation including in trade, peace and security, energy and infrastructure. We call on African leaders to accelerate this positive trend, notably by implementing the NEPAD Africa Action Plan, in order to overcome the developmental barriers posed by Africa's political and geographic fragmentation, and to reap the benefits of economies of scale and enhance the continent's competitiveness in the global economy.

Regional solidarity among women adds value
Feminisation of institutions brings radical change to the way in which women's and other issues are handled. Cross-border women's networks bring a fresh and results-orientated dimension to all aspects of economic, political and social cooperation. We call for an increase in women's participation and feminisation of regional cooperation networks and institutions. Regional cooperation can strengthen national efforts to empower and protect women and advance their rights.

Joint efforts to provide security need to be strengthened and adapted
As evidenced by the ongoing operationalisation of the African Peace and Security Architecture, the continent's states and regional organisations have made great progress in institutionalising efforts to address the scourges of war and conflict including injustice and impunity. However, both remain widespread and new forms of insecurity, including atomized and fluid forms of cross-border violence, the expansion of ungovernable spaces, and the rise of organized crime and trafficking aggravate the suffering of millions of people. We call on African leaders to strengthen their cooperation with each other and the international community to address new forms of insecurity and broaden existing security mechanisms to take changing realities into account.

Protection of women should be at the heart of security arrangements
Conflict brings suffering to everyone involved. Women are particularly vulnerable to and affected by both the short- and long-term consequences of conflict. Sexual abuse and incidents of gender-based violence tend to increase due to social upheaval and mobility, disruption of traditional social protection mechanisms, changes in gender roles, and widespread vulnerabilities. Governments and international organisations must adopt a zero tolerance approach to sexual and other forms of gender-based violence, and to enhance the attention and resources dedicated to addressing sexual violence. They need to deal with violations against women and girls and crimes of a sexual nature as a category of violations within the criminal justice system.

PARTNERSHIPS

African leaders need to advocate the fulfilment of commitments
The global economic crisis may erode the hard-won international consensus on development as many countries turn inward and commitments are postponed or even abandoned. African leaders need to honour their own commitments on good governance and investment in public goods and services and, on that basis, build a stronger international case for shared responsibility and mutual accountability for economic and social progress in Africa. Success will benefit not only for Africa, but the world. We recommend acceleration and coordination of ongoing efforts in Africa and beyond to track progress, encourage transparency and improve information flows, including through the establishment of a Mutual Accountability Index as a public resource and tool.

Commitments to Africa are commitments to its girls and women
If governance and development commitments by Africa's 52 male Heads of State and by their international counterparts are not honoured, women are hardest hit. Information on women in general and gender disaggregated statistics in particular are weak. Without this data, assessing the status and wellbeing of women will remain imprecise and policies inadequate. Monitoring women's empowerment and welfare is a shared responsibility but greater participation by women in government will increase the attention it receives. In addition to improving statistical and data gathering capacity, practical measures are needed by governments and their partners to encourage and support women in legislatures, for example with dedicated funding for political parties to field female candidates.

African leaders need more inclusive and results-oriented partnerships
African policymakers can be more assertive in building effective and mutually beneficial partnerships around their countries' social and economic development goals. This applies to all partnerships, whether with traditional or "new" investors and donors, whether governments or the private sector. Immediate opportunities include south-south partnerships and engagement with the private sector to deliver social and environmental benefits. We call on leaders to use their national and regional growth and development plans as the basis for practical partnerships around specific objectives such as food security, training, job creation, infrastructure, and low carbon energy generation.

Women's empowerment should be a specific objective for partnerships
Achievement of gender equity must be one of the specific objectives around which partnerships are formed, whether with public or private sector investors, donors and international financial institutions. Desired results need to be set and quantified, with regular monitoring and reporting to leaders and through the media. We call upon political and business leaders to ensure that goals and targets relating to women's participation and empowerment be systematically included in partnership agreements, regardless of the sector.

Finance and implementation plans for climate-resilient development need to be fast-tracked
Plans by industrialized countries to mobilize additional resources for climate change need to be accelerated, whether through a Green Fund or related initiatives. The momentum generated around the development of a common African position at Copenhagen must be maintained, particularly with regard to the management and disbursement of funds, insisting upon their additionality and predictability, and the importance of avoiding artificial distinctions between adaptation and development. African countries and regions, with support from the UN and IFIs, need to ensure that plans and capacities are in place to use additional resources effectively around proven interventions and bankable projects.

Gender intelligence is central to climate-resilient development
Growing awareness of the urgent needs generated by climate change can be used to focus attention on, and strengthen, women's role in development, and to create more opportunities for the achievement of gender equity. Understanding of the impact of climate change on girls, women and gender dynamics is hindered by lack of reliable information and resources; the design and implementation of appropriate policies and strategies is impaired as a result. Governments and partners must earmark funding for the collection, research and analysis of gender disaggregated data, and ensure gender intelligence is used in formulating climate change strategies and funding decisions.

Africa's partners need to increase the coherence of their policies
Africa's investment partners and donors have official policies towards Africa, usually expressed through the mission statements and goals of development agencies and financial intuitions. However, these are not necessarily coordinated with policies in other domains that affect African countries' ability to strengthen governance, retain economic value and compete internationally. A number of OECD countries have reviewed their policy coherence; we call for this process to be extended and deepened, with greater African involvement, to ensure a more joined-up approach by all partners.

Policy coherence must be designed with Africa's women in mind
Ongoing and envisaged efforts to strengthen the degree to which Africa's economic and governance needs are at the heart of policies need to be assessed in the light of gender equity objectives, whether by partners, governments or Africa's premier inter-governmental bodies, including the AU, RECs and UN agencies. We recommend that this be done systematically, with a view to identifying ways in which the needs and priorities of African girls and women can be put at the heart of efforts to strengthen mutual accountability among partners for women's empowerment.

FOREWORD

Africa is now being described as a new economic frontier. Barely a week goes by without news of the discovery of more oil, gas, precious minerals or other resources. Deals are being signed by African countries with an ever-broader array of partners, including from China, the Far and Middle East, South Asia and Latin America.

Trade is growing, both within the continent and internationally, including with the global South. Turnover of African corporations and banks is increasing. Domestic revenues, foreign direct investment, remittances and official development assistance (ODA) have all climbed steadily over the last decade, although the upward trajectory dipped in the wake of the global financial and economic crisis. After a gloomy year, economic growth rates are predicted to climb again, and restore the continent's place as one of the fastest-growing regions of the world.

All of this begs some obvious questions. Despite some extraordinary successes, why does progress on achievement of the Millennium Development Goals (MDGs) remain so slow, so uneven? Why do the absolute and relative numbers of people living in poverty remain so high? Why do so many people face food and nutrition insecurity, joblessness, and minimal access to basic services such as energy, clean water, healthcare and education? Why are so many women marginalised and disenfranchised? And why is inequality increasing?

At issue is not just the ability of African countries to attract and mobilize revenues, but their political determination and capacity to use what revenues they have to achieve results for people. Economic growth rates and increased trade are necessary but insufficient for genuine progress, which means sustained improvement in the quality of life of every African woman, child and man. However, growth can be exclusive, reinforcing or resulting in inequality and social tension; growth can fail to create opportunities or address the insecurity faced by families in rural areas and of people in search of work in the continent's burgeoning cities. This kind of growth does not necessarily represent progress.

It cannot be said often enough that Africa is not homogenous; it is raucously diverse, a celebration of different cultures, traditions and landscapes. Some African countries are blessed with resource wealth; others less so or not at all. But they all share a common challenge: investment in their citizens' productive capacity, and in public goods and services that will broaden the opportunities and benefits of growth for all.

The ingredients of success are not a mystery. Climate change is adding a new dimension, and urgency, to the challenge; sustainable development and job creation must be anchored in low-carbon growth, buttressed by attention to disaster-risk and vulnerability reduction. But it is not altering the fundamentals: the critical importance of political leadership to set and drive plans for equitable growth and poverty reduction; the importance of building the technical, management and institutional capacity, including planning, legal and negotiation skills, to mobilize revenues and to implement plans; and the centrality of good governance, the rule of law and of systems of accountability to ensure that resources are subject to public scrutiny and to keep political and business leaders on their toes.

Over the last decade, our understanding of what makes development effective has increased. Good, even visionary agendas have been formulated in every field, including infrastructure, food and nutrition security, women's empowerment, health systems, education and governance. We have a better appreciation of the centrality of domestic revenues, the importance of unleashing entrepreneurship and an enabling environment, of responsible investment, the need for concerted international action to address illicit financial flows and corruption, the value of public–private partnerships, and of the most strategic use of ODA to support national and regional development plans.

Lack of knowledge and shortage of plans are not the problem. Lack of funds per se may not be the problem either, given the continent's vast natural and human resources and the ongoing, often illicit,

At issue is not just the ability of African countries to attract and mobilize revenues, but their political determination and capacity to use what revenues they have to achieve results for people

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outflow of wealth. Political will is the issue, both in Africa and internationally.

Ten years ago, the Organization of African Unity (OAU) got behind the vision of a group of influential African leaders to promote a poverty-busting development agenda; the African Peer Review Mechanism was equally innovative. Today, a number of leaders stand out as champions of development, but they are still a minority, their achievements overshadowed by stories of other leaders' personal enrichment and authoritarian behaviour.

Internationally, there are understandable concerns that the consensus around development has been eroded by the global economic crisis. Everything must be done to keep hard-won commitments of the Millennium Declaration, the Monterrey Consensus, and the Gleneagles Declaration front and centre in international policy-making. One way of measuring this commitment is by whether ODA levels are being met. Many OECD and G8 countries are doing so; others are falling badly behind, raising doubts about their credibility at top decision making tables.

These shortfalls do not result from a decrease in human solidarity and sympathy between ordinary people around the world, which, I believe, is as solid as ever. Nor can it be ascribed to budgetary constraints alone, given the relatively modest sums involved. It comes from politicians' failure to communicate the imperative of putting the needs of least developed and African countries at the heart of global institutions and policies. The arguments for doing so, whether relating to climate change, food and nutrition security, trade, intellectual property, fighting crime, or investment in health and education, are not just ethical or altruistic, but practical and in the self-interest of richer countries.

More can be done by African leaders, in government, business or civil society, to advocate for development policies and resources, including with politicians and tax-payers in richer countries, whether the big emerging economies or traditional donors. Their voice is vital to the case for maintaining promises relating to ODA, which, despite what its detractors say, remains pivotal as a source of investment in public goods and services, particularly for people in resource-poor and fragile states.

Africa's growth needs to be measured not just in GDP figures but also by the degree to which it brings social benefits for all its people. Responsibility for driving equitable growth and for investing in achievement of the MDG targets rests firmly with Africa's political leaders. Civil society can be an ally if given the space to ensure that revenues and growth are not abused or limited to elites but shared more broadly and invested in jobs and public goods. The approach and actions of the private sector and of Africa's international partners, traditional and more recent, can also make a decisive difference to leaders' success.

If this goes wrong, Africa may face the prospect of greater inequality, more conflict and a perpetuation of chronic poverty and marginalization. If this goes right, the future is bright. The key is shared responsibility, and mutual accountability, between African leaders and their partners. Not just Africa's people, but those of the whole world stand to benefit.

Kofi Annan
Chair

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Africa's growth needs to be measured not just in GDP figures but also by the degree to which it brings social benefits for all its people

INTRODUCTION

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In last year's report we set out an agenda for progress on the basis of Africa's experience and expectations. We called upon African leaders to drive that agenda, and upon their international partners to support it. We argued that the successes that African countries have achieved demonstrate conclusively that Africa's development goals are attainable. We underlined the responsibility that Africa and its partners share for progress, and the need for a stronger sense of mutual accountability – for good governance, responsible use of resources to promote sustainable and equitable growth, and for achievement of individual Millennium Development Goals. We stand by this.

We hoped that last year's economic crisis would serve as a wake-up call for African leaders and their international partners. In exposing the connections between poverty, the food, fuel and climate-change crises, it would surely underline the importance of more holistic rather than piecemeal responses to promoting sustainable economic growth and reducing vulnerabilities.

Has it done so? The evidence is mixed. The crisis has highlighted a number of worrisome trends, not only on the ground – such as growing inequality, setbacks in achieving the MDGs, vulnerability and food insecurity – but also more broadly, including concerns that economic contraction and belt tightening squeezes out commitment to human development.

It has exposed deficits in both African and global governance. Recession and joblessness may not cause coups and conflict but they certainly add tension, particularly when political grievances are overlaid by a sense of economic exclusion and injustice. Globally, the crisis has accelerated architectural reconfiguration – but not necessarily in ways that benefit the least developed or African countries. Will the G20 have Africa as prominently on its radar screen as the G8 has had?

Measuring commitment by politicians is not easy. The volume and share of financial resources set aside for development is one objective yardstick, whether domestic revenues by African countries or ODA by members of the Organisation for Economic Cooperation and Development (OECD). By that measure, the momentum generated in the first decade of the new millennium, particularly around the New Partnership for Africa's Development (NEPAD) and Gleneagles, continues, but now appears to be tailing off.

The challenge is to articulate a compelling case for global solidarity and equitable growth – one that embraces but goes beyond ODA figures. Due to climate change, this may happen sooner than expected.

A sense of disappointment, if not failure, has followed the COP 15 Copenhagen Summit and its Accord. But the scientific and physical evidence affecting the lives and livelihoods of millions of people will not go away. The impact of rising temperatures becomes more obvious daily. The prospect is of a transformed political and development landscape, in which necessity rather than altruism will compel politicians to persuade their publics, finally, of the imperative to invest in sustainable global development.

Our report identifies these and other tectonic shifts, including the ascent of the G20, the increasing political and economic prominence of China, India and Brazil, and the potential of communication technology to alter fundamentally the policy landscape in which Africa's development takes place.

We begin this report by looking back to assess the progress Africa has made over the last five years, placing special emphasis on both the promises made and kept, as well as the various blueprints for progress agreed. We then look ahead and identify six priority areas for action, three for African policymakers and three for their international partners.

Given the diversity of the continent's 53 states and the diverse nature of their economies, these prioritizations are rather broad in nature. Our recommendations need to be adapted and adjusted to country-specific circumstances. We are nonetheless convinced that, if implemented, they will contribute to the delivery of measurable results that will increase the well-being of, and opportunities for, all Africans.

The crisis has highlighted a number of worrisome trends, such as growing inequality, vulnerability and food insecurity

PART I

FIVE PROMISING YEARS

Looking back at the last five years, we note that remarkable progress has been achieved in many fields, but that a number of setbacks, chronic problems and the effects of the global economic crisis and climate change combine to threaten the gains made since 2005. This section will briefly summarize the main developments in the areas of (1) economic growth, (2) governance, (3) social development, (4) peace and security, (5) food and nutrition security, (6) climate change, and (7) development finance and cooperation.

ECONOMIC GROWTH

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Three issues stand out. The first is the encouraging macro trends that preceded the advent of the global economic crisis. The second is the effect of that crisis on Africa's economies and people. The third is the policy response of African countries and their international partners.

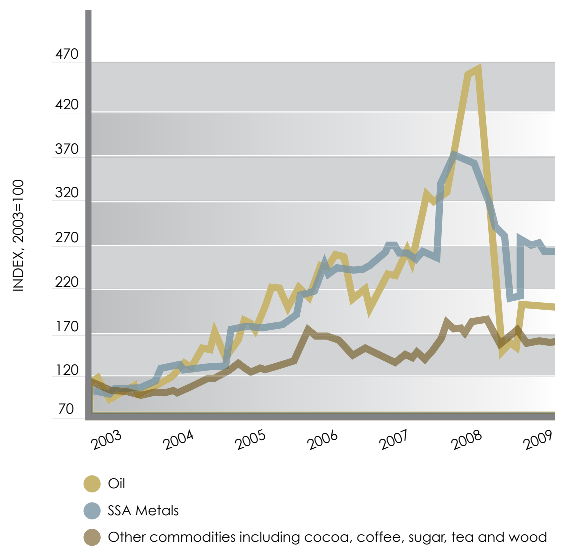
PRE-CRISIS ECONOMIC TRENDS

Prior to the crisis, Africa had been enjoying its longest and geographically most widely spread growth spurt, driven by healthy macroeconomic policies, lower public debts, increased political freedom, increased openness to trade, and a favourable global environment of strong external demand, ample liquidity, extended concessional financing, and higher commodity prices.[1]

The strong economic growth of 6 per cent average that Africa experienced in the five years leading up to the 2008 economic crisis was underpinned by a spectacular increase in the continent's trade. In real terms, the value of African exports increased fourfold between 1998 and 2008, driven by increases in both volumes and prices.[2] A particular noteworthy trend was the increasing share of trade with developing countries. Nine African countries now export more to developing countries (outside Africa) than they do to advanced economies, and 26 African countries export over one quarter of their total to developing countries.[3]

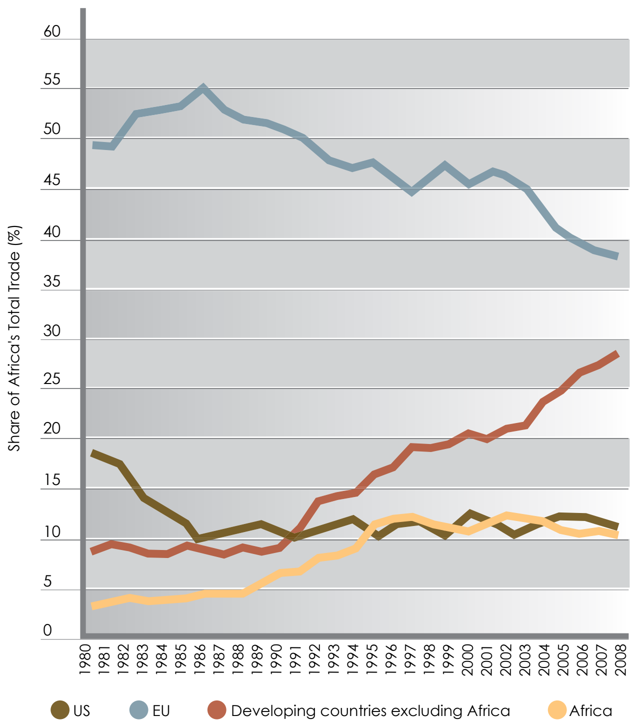
No country has been as emblematic of the growing trade between Africa and developing countries as China. The value of trade between Africa and China increased from $6.5 billion in 1999 to $107 billion in 2008, making China Africa's second-largest trade partner (after the US) and its largest developing-country partner by far. China alone accounts for over 11 per cent of Africa's external trade and is the region's largest source of imports.[4]

African Economic Growth and the Increase in Commodity Prices



Source: IMF, Regional Economic Outlook Sub Saharan Africa (2009)

Trade between Africa and Partners 1980 - 2008



Source: UNCTAD, Economic Development in Africa Report (2010)

The value of African exports increased fourfold between 1998 and 2008

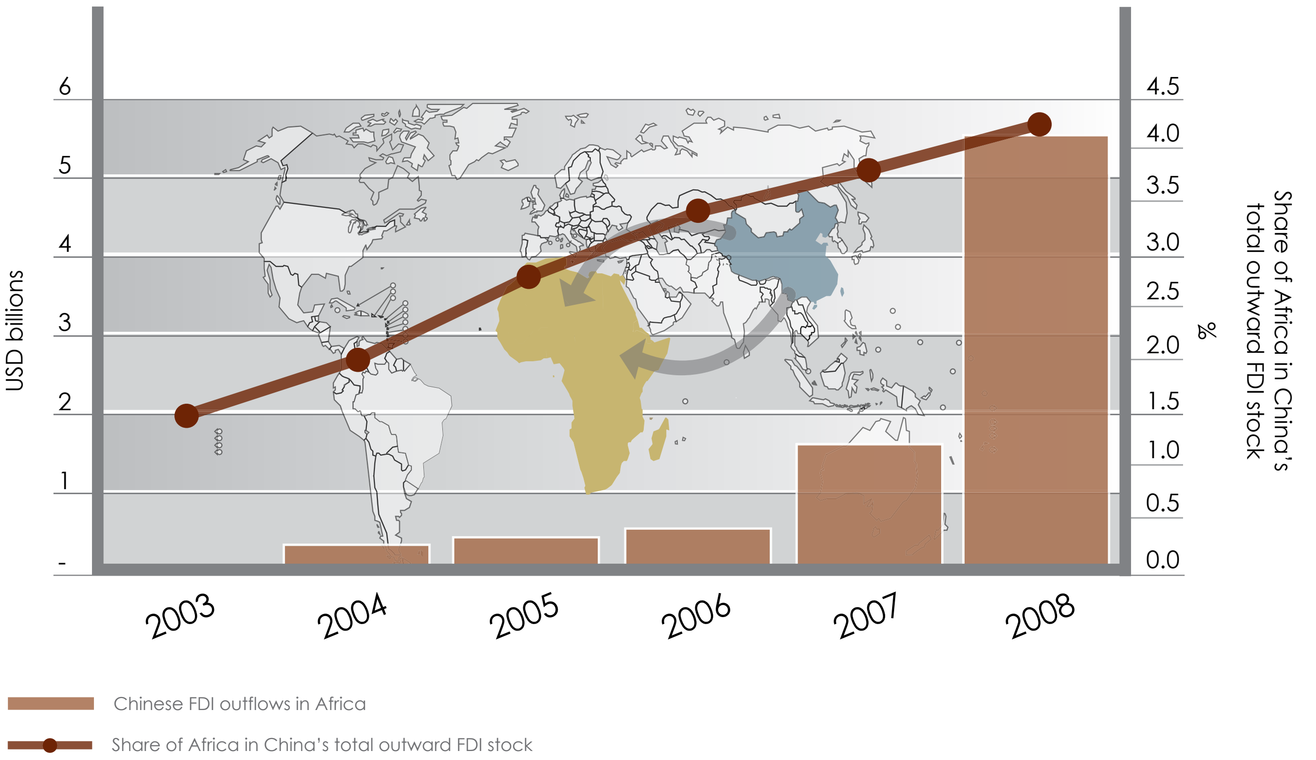
The increase in Africa's trade has been mirrored by the increase in Foreign Direct Investment (FDI) into Africa, which more than doubled between 2003 and 2008.[5] Once again, the growth in China's FDI to Africa has been particularly impressive even though in real terms the US and even Singapore still invest more in the continent.

Africa's growth spurt was not based solely on external factors. The last five years have also seen a consolidation of structural improvements within African economies and business environments. Many countries have worked hard to achieve macro-economic stability, pursue sound economic policies, diversify their economies, and reinforce their institutions. They have enhanced competitiveness, set out strategies for the development of hard and soft infrastructure, and improved business conditions. A Sub-Saharan African country (Rwanda) is leading the reform ranking in the World Bank's Doing Business Report for the first time in 2010.[6]

There have also been a number of encouraging developments at the regional level. Many of the continent's Regional Economic Communities (RECs) have moved ahead with ambitious projects to enhance regional integration, with the East African Community (EAC) planning for the creation of a monetary union, including a common currency, by 2015.[7] Continental bodies like the AU, NEPAD and the African Development Bank (AfDB) have also improved their capacity to support Africa's states through programmes like the African Financial Market Initiative (AFMI), the Africa Investment Initiative or the African Financing Partnership.

Despite these encouraging trends, Africa's economies are far from trouble-free. They remain burdened by enormous structural impediments, both domestically and internationally, that constrain productive potential and the scope for job creation and rising living standards. The private sector continues to face greater regulatory and administrative burdens, and

China's FDI in Africa



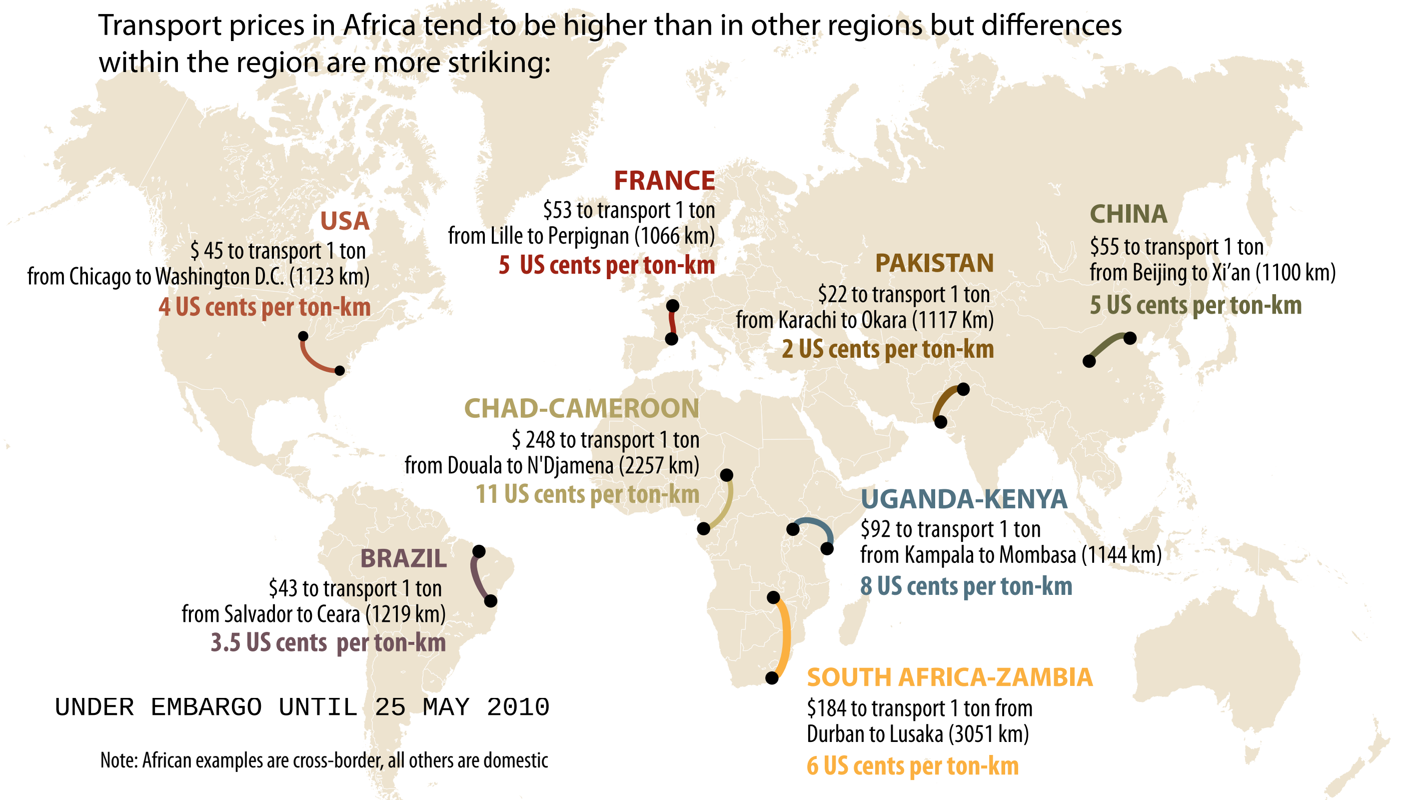
UNDER EMBARGO UNTIL 25 MAY 2010

Source: UNCTAD (2010)

Africa's economies remain burdened by enormous structural impediments

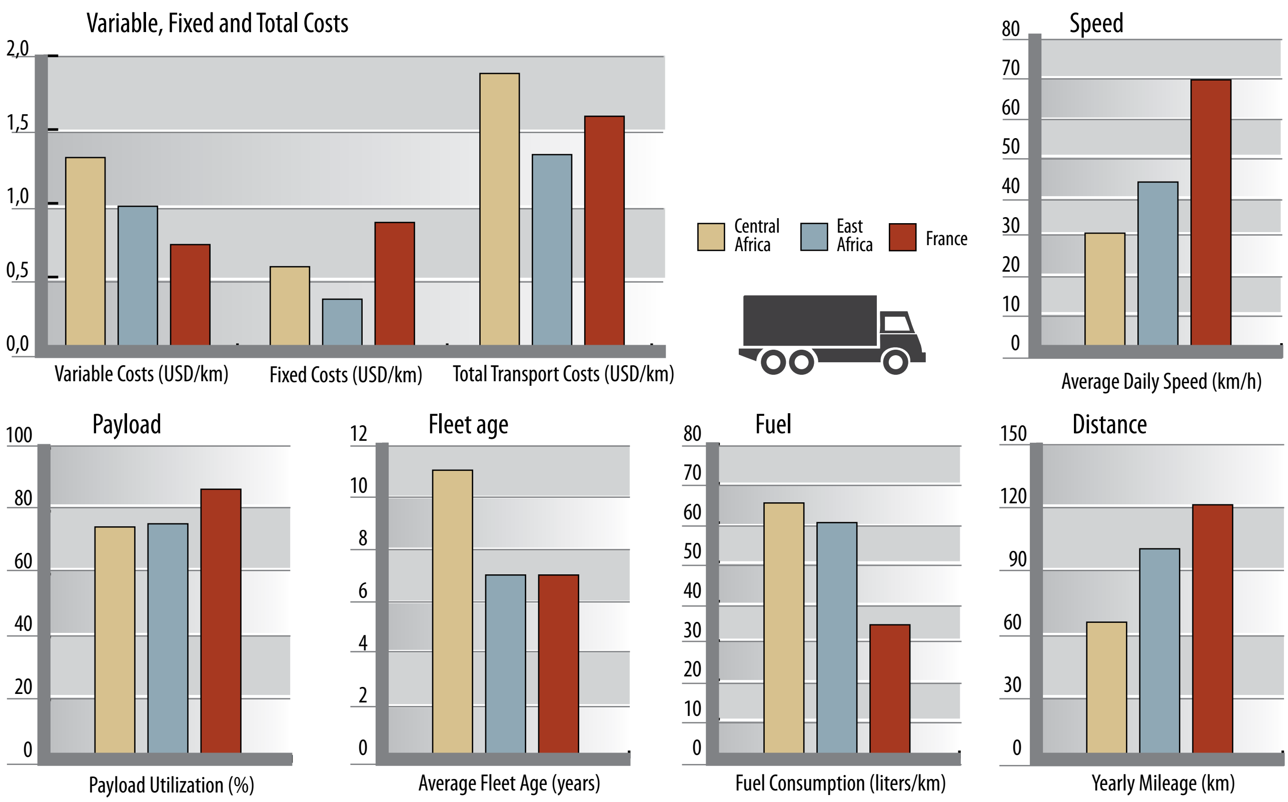
UNDER EMBARGO UNTIL 25 MAY 2010

Costs of Transportation in Africa and Other Regions



Source: Raballand and Teravaninthorn, Transport Prices and Costs in Africa: A Review of the International Corridors (2009)

A Comparison of Transport Variables between Central Africa, East Africa and France



Source: Raballand and Teravaninthorn, Transport Prices and Costs in Africa: A Review of the International Corridors (2009) less protection of property and investor rights, than in other regions. The lack of common standards, and of sufficient and reliable transport, communications and energy infrastructure, continues to restrict entrepreneurial potential and the movement of goods and services.

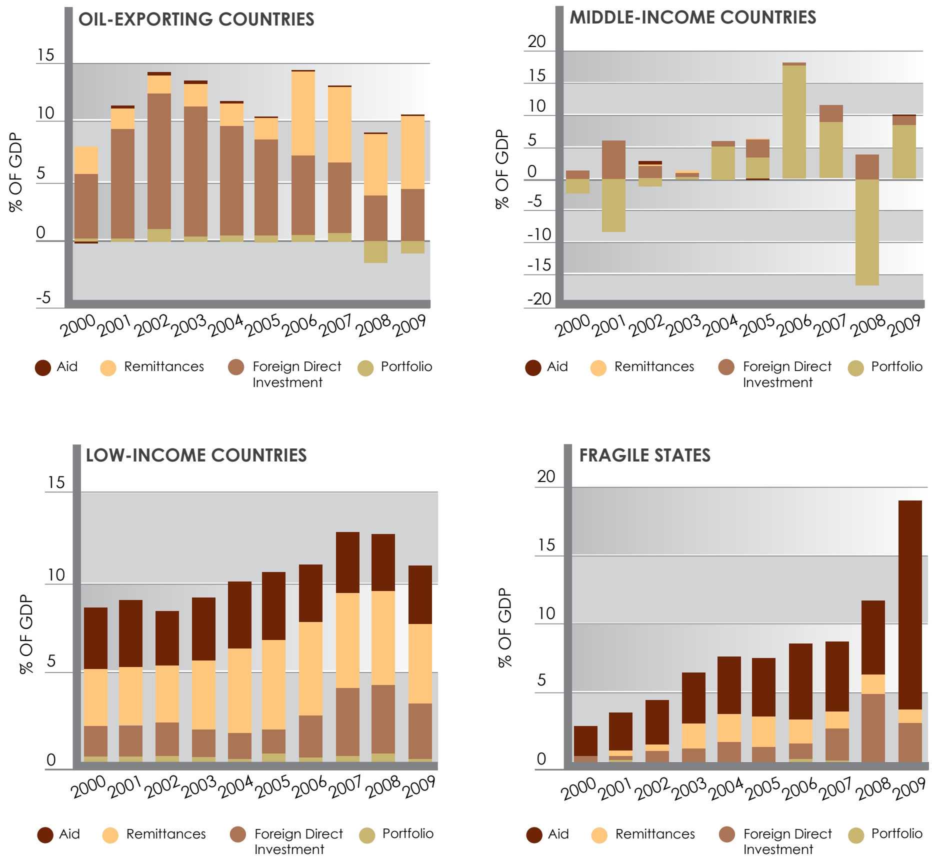
Many African countries rely almost exclusively on the export of primary (generally unprocessed) products and a number are still heavily dependent on aid and remittances. Informal sectors are large, competitiveness and productive capacities too low, and corruption permeates almost all African countries.[8] Despite sharp improvements in revenue collection, 11 governments in Sub-Saharan Africa still collect less than 15 per cent of GDP in the form of public revenue, a level considered as a minimum needed to cover the state's basic functions. The global economic crisis has made it harder to address these and other structural problems.

EFFECTS OF THE GLOBAL ECONOMIC CRISIS

Contrary to the expectations of some, and the hopes of many, that the impact of the economic crisis would be less severe in Sub-Saharan Africa, the effects of the crisis were transmitted widely in this region during 2009. Although the exposure of African financial institutions to asset bubbles and credit excesses was limited, many countries were hit by the collapse in trade and reductions in investment, foreign aid, remittances and government revenue.

Consequently, overall economic growth in Sub-Saharan Africa slowed sharply from 5.4 per cent in 2008 to 1.2 per cent in 2009. Three of the ten economies hit hardest by the economic crisis are in Sub-Saharan African: Angola, Botswana and Equatorial Guinea each saw GDP growth drop by at least 12 percentage

Foreign Inflows in Africa



Source: IMF, Regional Economic Outlook Sub Saharan Africa (2009)

Many African countries rely almost exclusively on the export of primary products points due to dwindling export demand. GDP growth in Africa's largest economy, South Africa, dropped 5.3 percentage points to minus 2.2 per cent in 2009.[9] At a general level, oil exporters and middle-income countries have been particularly hard hit, low-income countries somewhat less so.

International trade has been particularly affected. While global GDP is estimated to have contracted by 0.8 per cent in 2009, world trade volumes fell by 12.3 per cent, the first decline in world trade in over 60 years.[10] For many African countries, the effect of the global slowdown has meant a reduction in both the volumes and the prices of their exports. Additionally, the global financial crisis led to a credit crunch that constrained the continent's access to trade credit, as well as to substantial balance-of-payments gaps, triggering fast depreciations and high exchange-rate volatility.[11] As a result, it is estimated that exports as share of GDP have fallen from 41 per cent in 2008 to 31.2 per cent in 2009 for Sub-Saharan Africa.[12]

Both FDI and remittances to Africa also fell significantly, the former by as much as 36.2 per cent to $55.9 billion.[13] Remittances, which had been a dependable source of income for African households for years, growing robustly regardless of the state of the business cycle, fell by 6.1 per cent.[14] North African countries were hit harder by the drop in remittances, which for Morocco could be as large as 13.8 per cent, implying a loss of between 1.1 and 2.0 per cent of GDP growth.[15]

As a result of the collapse in trade and financial flows, real GDP growth rate in Sub-Saharan Africa was insufficient to match population growth (2.5 per cent) for the first time since 1994, resulting in a fall in per capita income. With such a large proportion of the population close to the poverty line, this fall could add up to 10 million people to the number of people below the $1.25 per day poverty line over 2009 and 2010.[16] The AfDB estimates that the crisis has increased unemployment in Africa by 10 per cent and that up to 35 million people could join the ranks of the working poor.[17]

POLICY RESPONSES TO THE CRISIS

African governments mostly continued to pursue prudent economic policies during the crisis – even though the visible payoffs (growth and poverty reduction) of these policies diminished. Reforms were not stalled or reversed, and the macroeconomic instabilities that had followed previous global slowdowns were generally avoided.

Using the room for manoeuvre and fiscal space created by their prudent pre-crisis policies, the majority of Sub-Saharan African countries chose to respond to the crisis by easing both fiscal and monetary policy. On the fiscal side, many countries have been able to let automatic stabilizers operate and in some cases even to pursue active countercyclical policies, which sustained domestic demand and helped to contain employment losses. Africa also benefited from the strong policy responses of the United States and European countries which reduced the potential knock-on effects of the crisis.

Africa's international partners also deserve credit for directly supporting the continent's policy responses. The IMF, in particular, responded to Africa's needs. With its resources having been boosted with Special Drawing Rights (SDRs) worth $250 billion at the G20's London Summit, lending to Sub-Saharan Africa was up almost fivefold from the year before, reaching $5 billion, with interest rates set at zero through 2011.[18] However, as in previous crises, other regions received disproportionally greater assistance.

FIRST SIGNS OF RECOVERY

By early 2010, the global economy appeared to be expanding again, propelled by the strong performance of Asian economies and stabilization or modest recovery elsewhere. In early 2010, the IMF projected that African growth would reach 4.3 per cent in 2010 and 5.3 per cent in 2011.[19] The focus of African policymakers shifted back to addressing longer-term challenges, including structural problems such as a lack of reliable energy, inadequate infrastructure, restricted access to markets and insufficient domestic revenue mobilization. A question remained about the extent to which the crisis has resulted in permanent social damage, and whether the policy responses have been sufficiently deep and widespread to reduce vulnerabilities to future crises and shocks. Little seems to have been done to address the regulatory deficiencies that allowed financial markets to undermine real sector priorities in the first place.[20]

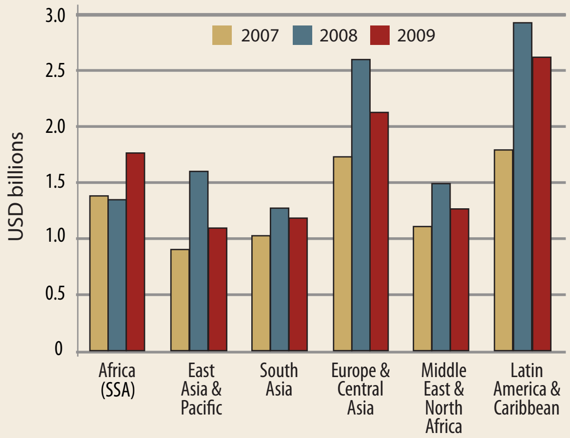
Questions remain about the extent to which the crisis has resulted in permanent social damage, and whether the policy responses have been sufficiently deep and widespread to reduce vulnerabilities to future shocks

UNDER EMBARGO UNTIL 25 MAY 2010

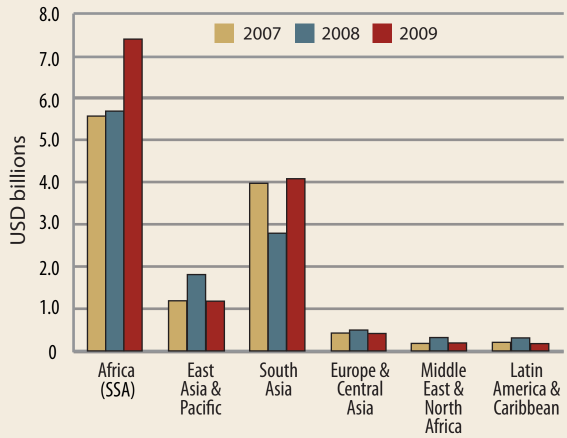
World Bank, IMF and AfDB Responses to the Global Financial Crisis

World Bank (IBRD, IDA & IFC)[1]

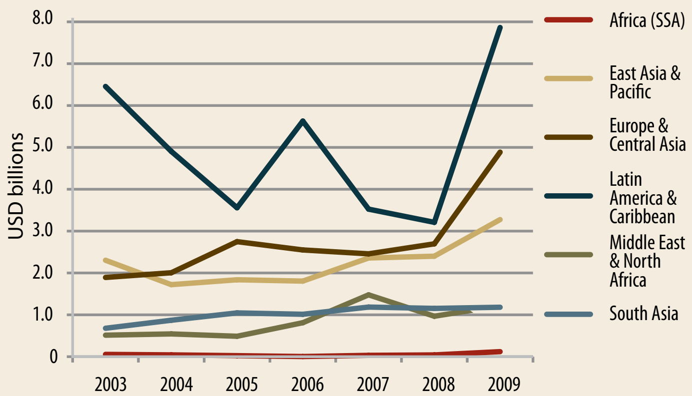
IFC Investment Commitments by Region



IDA Lending Commitments by Region



Total IBRD disbursements



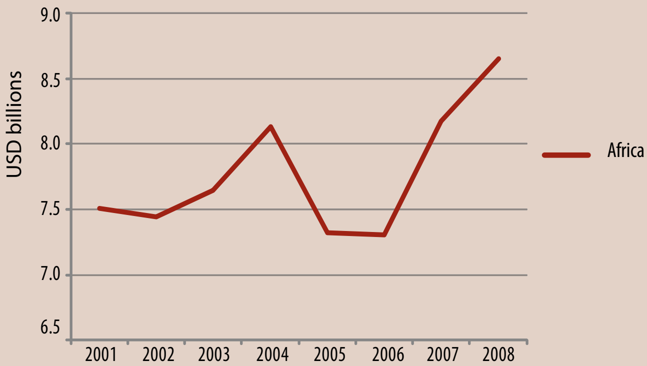
IFC's $10.5 billion of new commitments in fiscal 2009 was $1.5 billion (8%) less than IFC was aiming to achieve ($12 billion). New commitments fell in all regions, apart from Sub-Saharan Africa, where they reached an historic peak.

IDA commitments of $14 billion in fiscal 2009 were driven by strong delivery to Sub-Saharan Africa (53%) and South Asia (33%), with the rest going to other regions.

Total IBRD disbursements increased from $10.5 billion in fiscal 2008 to $18.5 billion in 2009. Disbursement to Africa -well below disbursements to other regions- tripled from 2008 to 2009 from $42 million to $120 million or 0.65% of total disbursements.

African Development Bank (AfDB)[2]

Net Loans provided by the AfDB



AfDB set up a $1 billion trade finance facility to help business in Africa affected by the financial crisis to cope. It also created an Emergency Liquidity Facility of $1.5 billion.

The commitments of the AfDB almost doubled between 2008 and 2009, in the wake of the financial crisis. The amount of commitment doubled from $5.8 billion to $11 billion, which will be realised by 2011.

The AfDB's shareholders endorsed a tripling of the Bank's capital resources (200%) to nearly $100 billion, in April 2010.

International Monetary Fund (IMF)[3]

As a consequence of the global economic crisis, at the London Summit (April 2009) the G20 agreed to triple the IMF's lending capacity to $750 billion, enabling it to inject extra liquidity into the world economy via a $250 billion allocation of Special Drawing Rights or SDRs. The IMF has responded with lending commitments of over $160 billion. As of July 2009, the IMF had approved 18 new lending arrangements of which 82% went to countries in the European area and only 1.6% to Africa.

By the end of 2009, new IMF commitments to Sub-Saharan Africa topped $3.6 billion, and increased its concessional assistance to low-income countries to $3.8 billion in 2009, up from $1.5 billion in 2008. Additional resources—including from the envisaged sale of IMF gold—are expected to boost the Fund's concessional lending up to $17 billion through 2014. The IMF also pledged around $6 billion to provide additional concessional and flexible finance for low-income countries. One of IMF responses has been to make financial assistance programs more flexible.

Further funding has been delivered by the IMF using its Exogeneous Shocks Facility which was modified in 2008 and again in 2009 to provide for more financing. The following countries have received loans under this facility: Mozambique ($176 million), Tanzania ($336 million), Cameroon ($144 million), Kenya ($209 million), Ethiopia ($240 million), and Senegal (an additional $112 million).

[1] Source: World Bank and Independent Evaluation Group (2009) The World Bank Group's Response to the Global Crisis. Update on an Ongoing IEG Evaluation
[2] Source: AfDB and Bank Information Centre
[3] Sources: Woods, N., The international response to the global crisis and the reform of the international financial and aid architecture (2009); and IMF, A Changing IMF - Responding to the Crisis Factsheet (2010)

GOVERNANCE

UNDER EMBARGO UNTIL 25 MAY 2010

The last five years have seen significant changes in political and economic governance. While these have been more evident at the national level, a number of noteworthy developments have also taken place at the regional and global levels.

NATIONAL GOVERNANCE

Data from UNECA's Africa Governance Report 2009 and the World Bank's Governance Indicators Project attest to moderate improvements in national governance since 2005. Given the difficult circumstances they face, several countries, including Benin, Ghana and Mali, have made purposeful strides in enhancing popular participation, political representation and competitive electoral politics, human rights and the rule of law.[21] Others like Burkina Faso and Djibouti have begun a cautious transition to greater openness. Multiparty elections have also become more regular, with comprehensive electoral processes in Ghana, South Africa and Zambia. The assertiveness of civil society in many countries is also a sign of progress; non-governmental organizations and other citizens' groups are increasingly able to hold governments to account for their actions.

African governments have also shown a growing willingness to sign up to, and in some cases implement, good-governance initiatives. By early 2010, 30 countries had acceded to NEPAD's African Peer Review Mechanism, 12 had been peer reviewed and 16 had launched the process by receiving support missions; 44 countries had signed, and 31 had ratified, the African Convention on Preventing and Combating Corruption; 20 African countries had been accepted as candidates in the Extractive Industries Transparency Initiative (EITI) and were waiting to be validated as compliant countries with Liberia already having reached that status. At the same time, Africa's international partners, particularly the United States, Germany and Switzerland, have also made great headway in controlling corruptive practices of their companies operating on the continent.[22]

But much of this progress has been overshadowed by recent setbacks and disconcerting trends. Chronic problems remain, including state fragility, corruption and widespread lack of basic freedoms. The most high-profile setback is the return of *coups d'état* – the last five years have seen violent and unconstitutional changes of government in Guinea, Guinea-Bissau, Madagascar, Mauritania, and Niger – despite the professed zero-tolerance policy of the African Union. This period has also seen the enforcement of shaky power-sharing deals in Kenya, Niger, Sudan and Zimbabwe, and the refusal of many African states to support the indictment of Sudan's President Omar al-Bashir by the International Criminal Court.

These setbacks are compounded by the lack of overall progress on accountability and political liberalization, and by the frequent disconnect between leaders and their people. There are many instances of elite capture of resources, growing inequality in wealth and opportunity, and the abuse of electoral processes to legitimize exclusive deals among the most powerful or to re-elect the incumbent. Many leaders are still doing whatever they can to hang onto power, including by adjusting constitutions as a basis for extending their tenures indefinitely. Freedom House categorizes only 46 per cent of all countries in Sub-Saharan Africa as "free", with 15 countries, including some of the continent's largest and most powerful, having been downgraded since last year's ranking.[23]

State fragility continues to be a major problem. The 2009 State Fragility Index categorizes Sub-Saharan Africa as the most fragile region in the world.[24] While a number of countries have become less fragile over the last five years, including Angola, Liberia, and Togo, the region as a whole shows the least net improvement in fragility ratings. The Central African Republic, the Republic of Congo, Côte d'Ivoire, Lesotho, and Namibia suffered notable increases in their fragility ratings. Nine of the fifteen countries downgraded in the 2010 Bertelsmann Transformation Index for qualitative deteriorations in their political systems are in Sub-Saharan Africa.[25]

A stronger basis has been laid for the fight against corruption. Ten per cent of the AU's 2010 budget ($20 million) has been earmarked for anti-corruption

There are many instances of elite capture of resources, growing inequality in wealth and opportunity, and the abuse of electoral processes

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Governance Scorecard 2005 - 2009*

Country	Mo Ibrahim Index	World Bank Governance	Transparency International Index	World Bank Doing Business	Index of Economic Freedom	Freedom House	Worldwide Press Freedom	Bertelsmann Transforma-tion Index
Algeria	↗	↘	→	↗	↗	→	↗	↗
Angola	↗	↗	→	↘	↗	→	↗	↗
Benin	↘	↗	→	→	↗	→	↗	↗
Botswana	→	→	↗	↗	↗	→	↗	↘
Burkina Faso	↗	↗	→	↘	↗	↗	↘	↘
Burundi	↗	↗	↗	↘	→	↗	↗	↗
Cameroon	↗	↗	→	↗	→	→	↗	→
Cape Verde	↗	↗	→	↘	↗	→	↗	●
Central African Republic	↗	→	↗	→	↘	↗	↘	↗
Chad	→	↘	→	↗	↘	↘	↗	↘
Comoros	→	↘	↗	↗	●	↗	↘	●
Congo	↗	→	↗	→	↘	↘	↗	→
D.R. of the Congo	↗	↗	→	→	●	→	↘	↗
Côte d'Ivoire	↗	↗	→	↗	↘	↗	↘	↗
Djibouti	→	→	→	↗	↘	→	↘	●
Egypt	↗	→	↗	↘	↗	↗	↘	↗
Equatorial Guinea	↗	→	→	↗	↘	↘	↗	●
Eritrea	↘	↘	→	→	●	→	↗	→
Ethiopia	→	→	↘	↘	↗	→	↗	→
Gabon	→	→	→	↗	→	↘	↗	●
Gambia	→	↘	→	↗	↘	↘	↗	●
Ghana	↗	↗	↘	↗	↗	↗	↘	→
Guinea	↘	↘	→	↗	↘	↘	↗	↘
Guinea Bissau	→	↗	↗	→	↘	→	↗	↗
Kenya	→	↗	→	↗	↗	↘	↘	↘
Lesotho	↘	→	→	↗	↘	→	↗	↗
Liberia	↗	↗	↘	↘	●	↗	↘	↗
Libya	↗	↗	→	●	↗	→	↘	→
Madagascar	↘	↘	→	↘	↘	↘	↗	↘
Malawi	↗	↗	↘	↗	→	→	↘	↗
Mali	↗	↘	→	↘	↘	↘	→	↘
Mauritania	↘	↘	↗	↗	↘	→	↘	↘
Mauritius	↗	↗	↘	↘	↗	↘	↗	↘
Morocco	↘	→	→	↘	↗	→	↗	↘
Mozambique	↘	↗	↗	↘	↗	↗	↗	↘
Namibia	→	↗	→	↗	↗	↗	↗	→
Niger	↗	↘	↘	→	→	↘	↗	↘
Nigeria	↗	→	↘	↗	↗	↘	↗	↘
Rwanda	↗	↗	→	↘	↗	→	↗	↗
São Tomé and Principe	→	→	→	→	●	→	●	●
Senegal	↘	↘	→	↗	↘	↘	↗	↘
Seychelles	↘	↘	↘	↗	●	→	↘	●
Sierra Leone	↗	↘	→	↘	↗	↗	↘	→
Somalia	→	↗	↗	●	●	↘	↗	↗
South Africa	↘	→	→	↗	↗	↘	↗	↘
Sudan	↘	↘	↗	↗	●	→	↗	→
Swaziland	↗	↗	↘	↗	→	→	↗	●
Tanzania	↗	↗	↗	↗	↗	→	↘	↘
Togo	↘	↗	↗	↘	↗	↗	↘	↗
Tunisia	→	↗	↗	↘	↗	↘	↗	→
Uganda	↗	↗	→	↗	↗	→	↗	↗
Zambia	→	↗	↘	↘	↗	↗	↗	→
Zimbabwe	↘	↘	↗	↘	↘	→	↘	↘
Percentage improved, neutral and declined for each indicator %	47 26 26	47 25 28	28 53 19	49 16 35	53 13 33	25 45 30	63 2 35	36 25 39 %

↗ Improvement
→ No Change
↘ Deterioration
● No data

*Notes: World Bank Governance (2005-2008). *Data covers 2005-2008 and estimates*; Transparency International Index. *Data for Guinea, Mauritania and Togo cover 2006-2009. Data for Cape Verde, Comoros, Djibouti, Guinea Bissau, Sao Tome covers 2007-2009*; World Bank Doing Business. *Data covers 2009-2010*; Index of Economic Freedom (2005-2009). *Data collection starts in 2009 for Comoros, DRC, Eritrea, Liberia, Sao Tome, Seychelles, Somalia and Sudan*; Freedom House. *Data covers 2005-2009*; Worldwide Press Freedom. *Data covers 2005-2009*; Bertelsmann Transformation Index. *Congo and Mauritania: data from 2005 don't exist - data covers 2008-2009.*

Data sources: Mo Ibrahim Index 2006 and 2009; Freedom House Index 2005 and 2009; World Wide Press Freedom Index 2005 and 2009; Transparency International Corruption Perceptions Index score 2006/07 and 2009; World Bank Doing Business Index Ease of Doing Business Rank 2009 and 2010; World Bank Governance Index (Voice & Accountability, Political stability & Absence of Violence/Terrorism, Government effectiveness) 2005 and 2008; Heritage Index of Economic Freedom 2005 and 2009, Bertelsmann Transformation Index (2005-2009).

activities and the creation of a new corruption commission. But due to entrenched resistance, progress remains slow. Corruption, notably commercial tax evasion, trade mispricing and illicit trade, continues to hamper the development of a conducive business environment, sap official revenues and curtail governments' ability to provide vital public and social services. Transparency International's 2009 Corruption Perceptions Index considers corruption to be rampant in 31 out of the 47 Sub-Saharan African countries assessed.[26] According to the World Bank, "quiet corruption" – the failure of public servants to deliver goods or services paid for by governments – also continues to be pervasive and widespread across Africa.[27]

REGIONAL GOVERNANCE

Over the last five years, African governments have continued to deepen and institutionalize cooperation in continental bodies such as the African Union, the New Partnership for Africa's Development and Regional Economic Communities (RECs) like the East African Community (EAC), the Economic Community of West African States (ECOWAS), or the Southern African Development Community (SADC). ECOWAS in particular has braved difficult circumstances and continued to improve its policies and structures.[28]

In addition to providing political steering mechanisms for the coordination and pursuit of collective interests within the continent, these institutions are also increasingly able to represent and act upon the views of their member states on the global stage.[29] Though serious problems of capacity, harmonization and legitimacy remain, this institutionalized coordination of national interests has amplified Africa's voice in international fora, and facilitated the adoption of common African positions on a wide range of issues, most recently for the COP 15 Copenhagen Summit in December 2009.

GLOBAL GOVERNANCE

The financial crisis, and global governance deficits it has exposed, have triggered re-examination of wider systemic issues such as the effectiveness of international institutional arrangements for policy dialogue and setting, coordination and action. Combined with the growing economic and political power of countries like Brazil, China and India, this re-examination has led to a number of seemingly positive developments for Africa. First, the ascent of the G20 is symptomatic of the emergence of a broad consensus on the need to adapt global governance to changed political and economic realities. At their three summits in Washington (November 2008), London (April 2009), and Pittsburgh (September 2009), G20 member states called for far-reaching reforms and firm deadlines for their implementation. In particular, G20 leaders endorsed a proposal to shift IMF quota share by at least 5 per cent from over-represented countries to under-represented countries and to reform the mandates, scope and governance of all international financial institutions in the medium term (by 2011).

FROM THE G8 TO THE G20

Established as a meeting of finance ministers in 1999, the G20 was seized upon at the height of the global economic crisis as a vehicle for leaders to coordinate their policies and map out a global response strategy. Together, member countries represent about 90 per cent of global gross national product, 80 per cent of world trade, and two-thirds of the world's population. Despite the undeniable attractions of greater inclusivity and wider geographical reach, the rise of the G20 has not necessarily improved Africa's position in the international governance architecture. There is a danger that the overdue inclusion of big emerging economies with their own needs and priorities will have the effect of further marginalizing the world's least developed and most vulnerable countries.

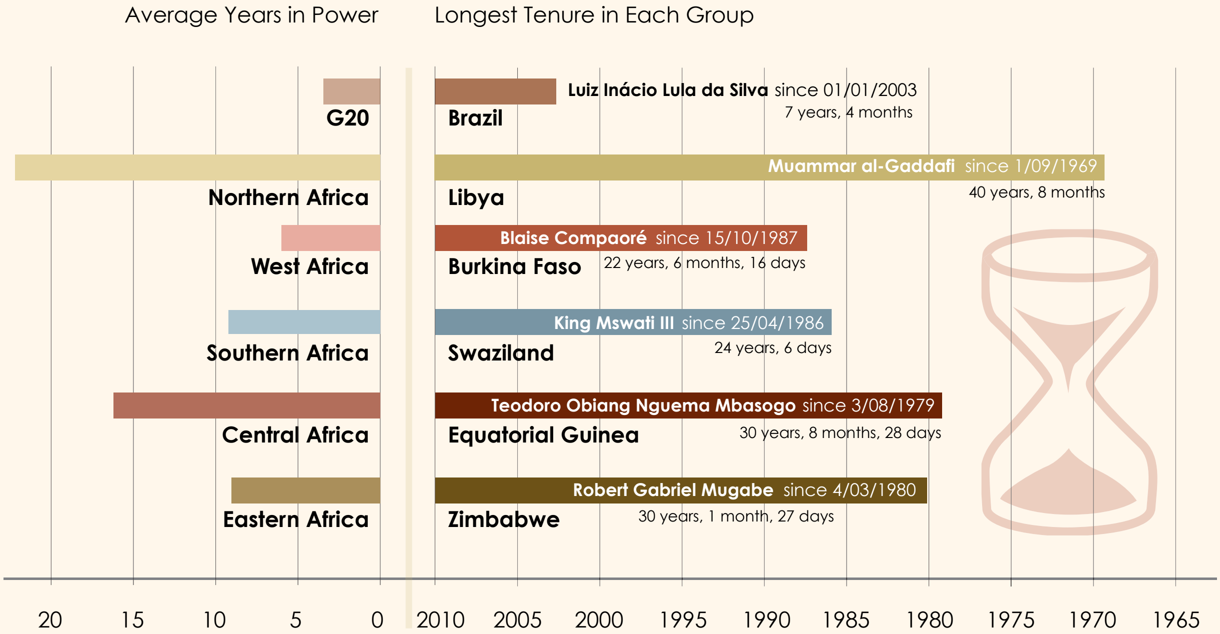
Emerging powers like China are recognizing the political attractiveness of supporting least developed countries' and African policy concerns on the global stage. The Forum on China–Africa Cooperation (FOCAC) Action Plan for the period 2010–2012 explicitly reaffirms Chinese support for better representation of Africa in global governance mechanisms such as the IMF and the UN Security Council. The emergence of new political groupings, such as BASIC (Brazil, South Africa, India, and China) or BRIC (Brazil, Russia, India, and China) around specific objectives like climate change and trade may also help to accelerate the evolution of entrenched patterns of global governance.

Corruption, notably commercial tax evasion, trade mispricing and illicit trade, continues to hamper the development of a conducive business environment

However, beyond the statements, there has been little actual change. Growing recognition that African countries are profoundly affected by climate change and failures in global economic governance, and that they must be part of the solutions, has not necessarily been matched by steps to ensure its place at top tables. Even when there has been some progress, as with the World Bank's allocation of a third seat on its government board to Sub-Saharan Africa, African governments have been slow to take advantage.

UNDER EMBARGO UNTIL 25 MAY 2010

G20 and African Leaders - Years in Power



Africa and G20 leader's tenure as of **1 May 2010**

(The graph follows the official regional grouping from the United Nations)

Source: APP, various sources

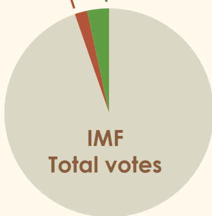
Growing recognition that Africa is profoundly affected by climate change and failures in global economic governance has not been matched by steps to ensure its place at top tables

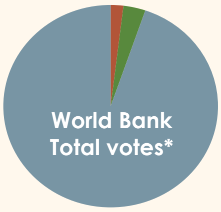
UNDER EMBARGO UNTIL 25 MAY 2010

Africa's Share of Votes at the World Bank and IMF

There are **24 executive directors** on the governing boards of the IMF and the World Bank. Each Executive Director represents a group of countries with different shares of voting power. Sub Saharan Africa is mainly represented in only two groupings that have, on average, **under 5%** of the total votes.

Grouping	IMF	WB
1) Azerbaijan, Kyrgyz Republic, Poland, Serbia, Switzerland,Tajikistan Turkmenistan, Uzbekistan	2.8%	3.2%
2) Angola, Botswana, Burundi, Eritrea, Ethiopia, The Gambia, Kenya, Lesotho, Liberia, Malawi, Mozambique, Namibia, Nigeria, Sierra Leone, South Africa, Sudan, Swaziland, Tanzania, Uganda, Zambia	3.0%	3.5%
3) Saudi Arabia	3.2%	2.4%
4) Bahrain, Egypt, Iraq, Jordan, Kuwait, Lebanon, Libya, Maldives, Oman, Qatar, Syrian Arab Republic, United Arab Emirates, Yemen	3.2%	2.2%
5) Denmark, Estonia, Finland, Iceland, Latvia, Lithuania, Norway, Sweden	3.4%	3.2%
6) Russian Federation	2.7%	2.2%
7) Brunei Darussalam, Cambodia, Fiji, Indonesia, Lao People's Democratic Republic, Malaysia, Myanmar, Nepal, Philippines, Singapore, Thailand, Tonga, Vietnam	3.5%	2.8%
8) France	4.9%	4.4%
9) Antigua and Barbuda, The Bahamas, Barbados, Belize, Canada, Dominica, Grenada, Ireland, Jamaica, St. Kitts and Nevis, St. Lucia, St .Vincent and the Grenadines	3.6%	4.0%
10) China	3.7%	2.0%
11) Albania, Greece, Italy, Malta, Portugal, San Marino, Timor-Leste	4.1%	3.7%
12) Japan	6.0%	7.6%
13) Afghanistan, Algeria, Ghana, Iran, Morocco, Pakistan, Tunisia	2.4%	2.5%
14) Australia, Kiribati, Korea, Marshall Islands, Federated States of Micronesia, Mongolia, New Zealand, Palau, Papua New Guinea, Samoa, Seychelles, Solomon Islands, Vanuatu	3.4%	3.5%
15) Argentina, Bolivia, Chile, Paraguay, Peru, Uruguay	2.0%	2.2%
16) Benin, Burkina Faso, Cameroon, Cape Verde, Central African Republic, Chad, Comoros, Democratic Republic of Congo, Republic of Congo, Côte d'Ivoire, Djibouti, Equatorial Guinea, Gabon, Guinea, Guinea-Bissau, Madagascar, Mali, Mauritius, Niger, Rwanda, São Tomé and Príncipe, Senegal, Togo	1.3%	2.8%
17) Germany	5.9%	5.2%
18) Armenia, Bosnia and Herzegovina, Bulgaria, Croatia, Cyprus, Georgia, Israel, Macedonia FYROM, Moldova, Montenegro, Netherlands, Romania, Ukraine	4.8%	4.6%
19) United States of America	16.7%	17.2%
20) Austria, Belarus, Belguim, Czech Rep., Hungary, Kazakhstan, Luxembourg, Slovak Rep., Slovenia & Turkey	5.1%	4.2%
21) United Kingdom	4.9%	4.9%
22) Brazil, Colombia, Dominican Republic Ecuador, Guyana, Haiti, Panama, Suriname, Trinidad and Tobago	2.4%	3.4%
23) Bangladesh, Bhutan, India, Sri Lanka	2.4%	3.9%
24) Costa Rica, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Spain, Bolivarian Rep. of Venezuela	4.4%	3.7%





* Average share for each grouping considering IBRD, IDA & IFC.

* This illustration shows IMF country groupings. Variations between IMF and World Bank groupings are as follows: Eritrea, Guyana and Norway are not part of the World Bank IBRD groups. Cambodia for IBRD is in group (14); The Philippines for IBRD is in group (22) and The Seychelles for IBRD is in group (22). St. Vincent & the Grenadines, Surinam, San Marino and Brunei are not part of World Bank IFC country groupings. Guyana for IFC is in group (9). Namibia, Seychelles, Antigua & Barbuda, Jamaica, Belarus, Bulgaria, Romania, Lithuania, Suriname, Brunei, Malta, San Marino, Bolivarian Rep. of Venezuela, Bahrain and Qatar are not part of the World Bank IDA country groupings. Guyana for IDA is in group (9).

The whole of Sub-Saharan Africa has fewer votes in the IMF **(4.35%)** than France **(4.85%)**, the UK **(4.85%)**, Germany **(5.87%)** or Japan **(6.01%)**.

4% of the executive directors and **none** of the managing directors of the IMF are women.

45 Sub-Saharan African countries are represented by just **2 executive directors** in the IMF and WB. These countries have over 800 million people, approximately **11% of global population.**

OECD or developed countries, who have less than **14%** of the world population, have a substantial overall majority of the votes in the IMF **(60.4%)** and in the WB **(57%)**.

Sources: APP, compilation from various sources

SOCIAL DEVELOPMENT

UNDER EMBARGO UNTIL 25 MAY 2010

On current trajectories, many African countries will not meet their MDG-based targets on social development. Despite strong economic growth, an overall improvement in the policy environment, and many success stories particularly in the area of primary education, the continent as a whole is lagging behind on each of the relevant goals.[30] Progress, already too slow, now risks being further undermined by the effects of the global economic crisis and climate change.

POVERTY ALLEVIATION

To the detriment of hundreds of millions of Africans, the continent's strong economic growth over the last five years has not translated into social protection or widespread poverty reduction. While there is controversy around both the method of computation and the actual level of Africa's poverty rate,[31] most African countries will not reach their poverty-reduction goals by 2015.[32] The global economic crisis is expected to add millions to the ranks of the working poor, with the International Labour Office (ILO) estimating that the rate of working poverty in Sub-Saharan Africa has already increased from 58.9 per cent in 2007 to as much as 67.9 per cent in late 2009.[33]

EDUCATION

The picture on education is decidedly less bleak. Over 30 African countries are on track to achieve universal primary education by 2015 thanks to efforts made by their governments and effective support from their development partners through highly improved bilateral and multilateral programmes. Some countries, like Benin, which started out in 1999 with one of the world's lowest net enrolment rates, have achieved remarkable advances.[34]

Half-way through Africa's Second Decade of Education (2006–2015), many countries have scaled up domestic resources allocated to education, with particularly sharp increases occurring in Ethiopia, Kenya, Mozambique and Senegal.[35] Twenty-three countries have developed national education plans endorsed by the World Bank's Education for All Fast Track Initiative (FTI), and 17 have already formulated long-term plans to achieve Education for All, outlining available domestic resources and external funding needs as agreed at the Abuja Financing for Development Conference in 2006.[36]

However, enormous challenges remain. Almost 50 million children – especially girls – from poor backgrounds and rural communities still do not have access to primary education, because countries are not able to provide adequate services. School fees and other costs continue to discourage school attendance in many countries and enrolment inducing practices, including the provision of food and sanitary pads at school, are still not widespread enough. The story gets worse as children get older. Secondary and tertiary intake rates in Sub-Saharan Africa remain as low as 32 per cent and 5 per cent, respectively. In addition, higher education is becoming more inaccessible to the poorer sections of society.

For many countries, access to adequate funding continues to be the main problem. Insufficient domestic revenues are allocated and, with a few exceptions, bilateral donors have not delivered on their commitments of long-term predictable financing for the education sector. The multilateral picture is no better, with the FTI having not been able to make more than a small contribution towards filling the financing gap.[37] The economic crisis is expected to put additional pressure on national education budgets in Africa, with UNESCO projecting a potential loss of $4.6 billion for 2010, equivalent to a 10 per cent reduction in spending per primary school pupil.[38]

Many African countries will not meet their MDG-based targets

MDG Progress in Africa

UNDER EMBARGO UNTIL 25 MAY 2010

Goal	Target	North Africa	Sub Saharan Africa
Goal 1: Eradicate extreme poverty and hunger	Reduce extreme poverty by half	low poverty	very high poverty
	Productive and decent employment	very large deficit in decent work	very large deficit in decent work
	Reduce hunger by half	low hunger	very high hunger
Goal 2: Achieve universal primary education	Universal Primary schooling	high enrolment	low enrolment
Goal 3: Promote gender equality and empower women	Equal girls'enrolment in primary school	close to parity	close to parity
	Women's share of paid employment	low share	low share
	Women's equal representation in national parliaments	very low representation	low representation
Goal 4: Reduce child mortality	Reduce mortality of under-five-year-olds by two thirds	low mortality	very high mortality
	Measles immunization	high coverage	moderate coverage
Goal 5: Improve maternal health	Reduce maternal mortality by three quarters	moderate mortality	very high mortality
	Access to reproductive health	moderate access	low access
Goal 6: Combat HIV/AIDS, malaria and other diseases	Halt and reverse spread of HIV/AIDS	low prevalence	high prevalence
	Halt and reverse spread of tuberculosis	low mortality	high mortality
Goal 7: Ensure environmental sustainability	Reverse loss if forest	low forest cover	medium forest cover
	Halve proportion without improved drinking water	high coverage	low coverage
	Halve proportion without sanitation	moderate coverage	very low coverage
	Improve the lives of slum-dwellers	moderate proportion of slum-dwellers	very high proportion of slum-dwellers
Goal 8: Develop a global partnership for development	Internet users	moderate usage	very low usage

- Already met the target or very close to meeting the target
- Progress sufficient to reach the target if prevailing trends persist
- Progress insufficient to reach the target if prevailing trends persist
- No progress or detoriation

Source: United Nations Statistics Division (2009)

GENDER EQUALITY AND WOMEN'S EMPOWERMENT

UNDER EMBARGO UNTIL 25 MAY 2010

Awareness has grown over the last decade of the importance of women's empowerment. The adoption by the AU of the Solemn Declaration on Gender Equality in 2004 has given a new prominence to the issue of women's rights. This has been reflected in new national laws ranging from tackling violence against women to equal pay. The election of Ellen Johnson Sirleaf as President of Liberia one year later was symbolic of change in Africa and of progress for women across the continent. Rwanda's parliament was the first in the world in which women took over half the seats (56 per cent including the speaker); two African countries (South Africa and Lesotho) feature in the top ten of the World Economic Forum's 2009 Global Gender Gap Index; both are sources of pride.[39]

But, as women everywhere on the continent know, this is not the full picture. Significant gender gaps persist in education, health, employment, wages and political participation. For every headline success, there are many more cases of women who find their talents and aspirations blocked by formal and informal barriers. Five years after the target date, gender parity in education has yet to be achieved. Although more women have been able to secure paid jobs, they have generally failed to access decent work – over 80 per cent of all women in Sub-Saharan Africa face income and job insecurity.[40] Africa has a long way to go in liberating and harnessing the energy and skills of women, and this aggravates developmental challenges and restricts progress towards the MDGs.

Significant gender gaps persist in education, health, employment, wages and political participation

Opportunities for Women from Birth and Through Life in Selected Countries

Country	Childhood: Probability of dying by age 5 (per 1000 live births)	Primary school: Percentage of girls enrolled in primary school (%) (0-49 / 50-74 / 75-94 / 95+)	University: Women as a percentage of all university students (%) (0-19 / 20-39 / 0-59 / 60+)	Economically Active: Percentage of economically active women, over 15 years of age (%) (0-19 / 20-39 / 40-59 / 60+)
Nigeria	195	95+	20-39	40-59
South Africa	62	95+	0-59	40-59
Ethiopia	158	75-94	20-39	40-59
Egypt	36	95+	no data	20-39
Senegal	132	75-94	no data	40-59
Ghana	111	75-94	20-39	60+
Uganda	132	95+	0-59	60+
Kenya	110	95+	20-39	60+
Mali	208	50-74	20-39	60+
Central African Republic	185	0-49	no data	60+
Netherlands	5	95+	0-59	40-59
Sweden	3	95+	60+	60+
UK	5	95+	0-59	40-59
Turkey	25	75-94	0-59	20-39
Russia	11	95+	0-59	40-59
China	27	95+	0-59	no data
India	81	95+	20-39	no data
Pakistan	96	75-94	0-59	20-39
Brazil	18	95+	0-59	40-59
Bolivia	60	95+	no data	40-59
Chile	8	95+	0-59	40-59
US	7	95+	0-59	40-59

* Gender disaggregated data and in particular data on domestic violence is not routinely collected through censuses. Much of this information is collected through surveys using a variety of methodologies and coverage is often uneven and/or incomplete.

Data Sources: Earthscan, The Atlas of Women in the World, fourth edition (2009); ILO, LABORSTA 2008 data and The World Bank Database (2008 data).

Career Opportunities — Women's top three occupations (%)	Motherhood — Maternal mortality rate (per 100,000 live births)	Children — Total Fertility Rate (Children per woman)	Domestic Violence* — Percentage of adult women reporting physical abuse by male partner or intimate (%)	Life Expectancy (years)
87% 3% 2%	700-999	5.3	66	49
37% 36% 16%	100-399	2.6	25	53
91% 6% 3%	100-399	5.4	58	58
32% 24% 17%	10-99	2.7	47	70
no data	400-699	5	no data	61
50% 36% 15%	400-699	4.3	33	58
77% 17% 5%	100-399	6.4	30	51
75% 16% 10%	1000+	5.0	no data	55
no data	1000+	5.6	no data	48
no data	1000+	4.8	no data	48
22% 20% 19%	10-99	1.8	16	82
30% 21% 21%	>10	1.9	no data	83
25% 20% 15%	10-99	1.9	no data	81
32% 18% 10%	10-99	2.2	58	75
22% 20% 20%	10-99	1.2	70	73
no data	10-99	1.9	30	75
no data	400-699	2.8	42	64
58% 18% 12%	400-699	4.0	80	63
23% 20% 14%	100-399	1.9	30	75
37% 22% 15%	400-699	3.6	70	67
44% 21% 15%	10-99	1.9	50	81
33% 25% 21%	10-99	2.0	31	80

Career Opportunities legend: agriculture/fishery; industry; associate professional; services; elementary occupation; clerical; unemployed; professional

Motherhood scale: >10 | 10-99 | 100-399 | 400-699 | 700-999 | 1000+

Life Expectancy scale: 0 | 50 | 100

UNDER EMBARGO UNTIL 25 MAY 2010

HEALTH

The last five years have seen positive developments. Many African governments have increased their spending on the health sector and most have committed themselves to a series of meaningful reform initiatives. Most African governments signed the Maputo Plan of Action on Sexual and Reproductive Health and Rights in 2006, and adopted an eight-year African Health Strategy focused on health-system reform in 2007. In the Ouagadougou, Algiers and Libreville Declarations of 2008, most African governments also committed themselves to: ensuring better access to, and quality of, health services; a strong health workforce; an effective health-information system; equitable access to essential medical products, vaccines and technologies; and a functioning health- financing system.[41] The efforts of national governments are also increasingly supported by regional initiatives such as the African Union's Campaign on Accelerated Reduction of Maternal Mortality (CARMMA), or its African Diaspora Health Initiative, which provides a platform from which health experts of the African Diaspora can transfer information, skills and expertise to their counterparts on the continent.

The level and quality of international support has continued to increase over the last five years. Financing for health has grown; the US has made a particularly significant contribution through its Presidential Emergency Plan for AIDS Relief. Innovative financing mechanisms like Advanced Market Commitments, the UNITAID airline-ticket solidarity tax, the International Financing Facility for Immunization (IFFIm), and the Global Fund's Affordable Medicines Facility – Malaria (AMFm) have been launched to bridge existing and expected funding gaps. Thanks to initiatives like Harmonization for Health in Africa (HHA), the International Health Partnership (IHP), and the institutionalization of coordination among the eight global health agencies (the "H8"), synergies are being created among the multitude of actors engaged in African health issues, reducing unnecessary duplication of effort. However, funding is still too focused on disease-specific issues.

As a result of better national policies and greater international support, several African countries have been able to make tangible progress towards their health targets. Currently, six countries (Algeria, Cape Verde, Eritrea, Malawi, Mauritius and the Seychelles) are on track to achieve their MDG-based targets of reducing child mortality. Five countries (Angola, Comoros, Eritrea, the Seychelles and Zambia) are on track to achieve their targets on tuberculosis. Eleven countries have started to observe declines or stabilization in HIV prevalence trends.[42]

Despite these successes, the available evidence, limited as it may be, indicates that Africa as a whole is significantly off track in terms of meeting MDG-based targets on reducing child mortality, improving maternal health and combating infectious disease. Many of Africa's health systems remain woefully under-funded, under-staffed and ill equipped. Only a handful of countries, including Botswana, Malawi, Niger, Rwanda, Uganda and Zambia, had met the Abuja Target of allocating 15 per cent of their public expenditure to the health sector; less than half allocated more than 10 per cent and many spent less than the $54 per person considered the absolute minimum to provide essential health services.[43] As a result, malaria and other vector-borne diseases that can be controlled and treated continue to take millions of lives. Rising temperatures caused by climate change are compounding the problem.

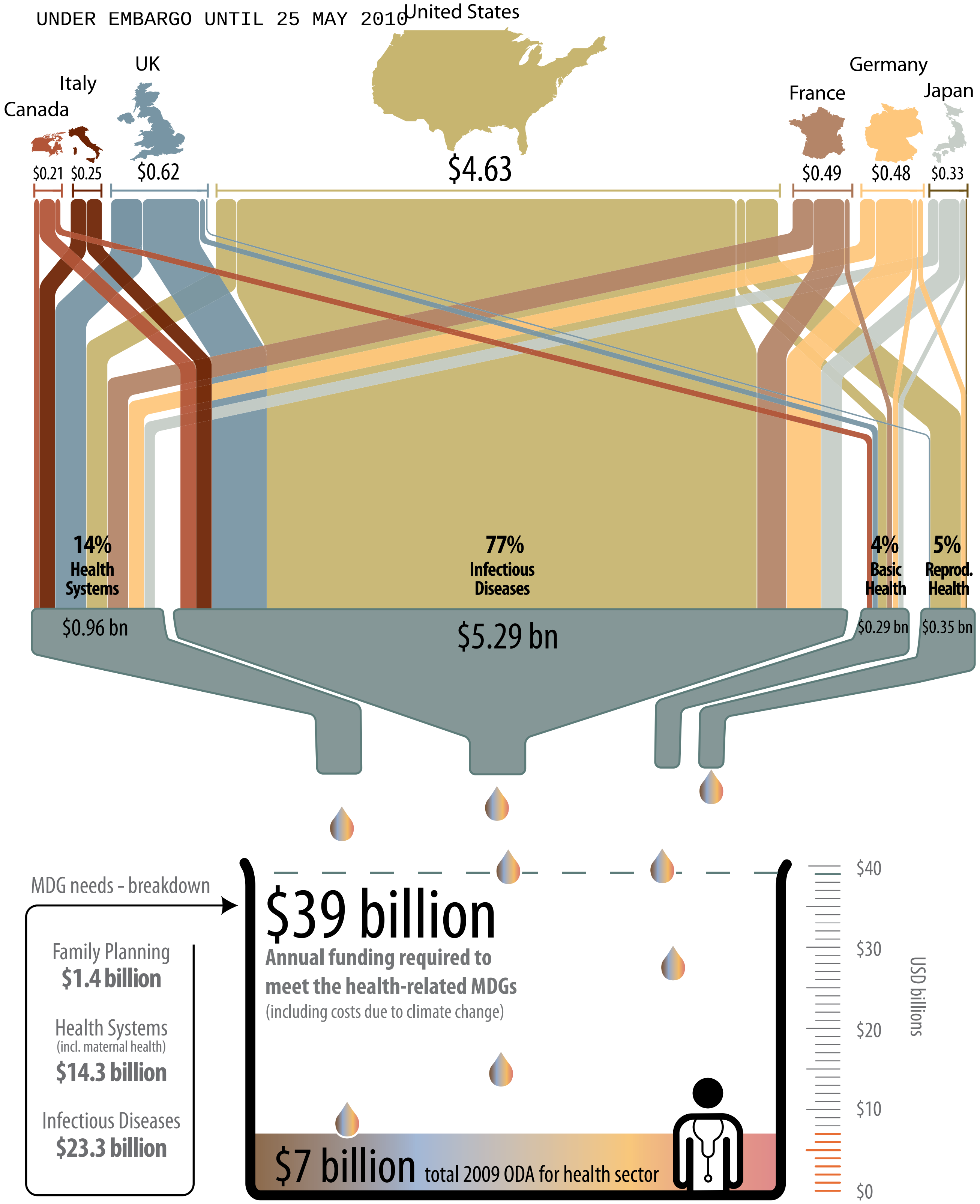
Despite a decline in the number of new HIV infections, from 2.3 million to 1.9 million between 2001 and 2008, Sub-Saharan Africa also remains the region most heavily by far affected by HIV/AIDS, accounting for 71 per cent of all new infections in 2008.[44] Giving birth safely continues to be largely a privilege of the rich. A pregnant woman in Africa is still 180 times more likely to die of pregnancy complications than is her European counterpart. At the current pace, the child-mortality goal will not be achieved until 2045, our promise on maternal health will not be fulfilled at all, and in some regions maternal mortality rates will actually become worse.[45]

The level and quality of international support has continued to increase over the last five years

G7 Health Funding to Africa by Sector

ODA given by G7 donors to four main health target areas in 2009 (All figures in USD billions)

UNDER EMBARGO UNTIL 25 MAY 2010



Data Source: ONE, The DATA Report (2010); and Samuel Fankhauser and Guido Schmidt-Traub, From Adaptation to Climate-Resilient Development (2010)

ACCESS TO WATER AND SANITATION

Remarkable advances have been made in several African countries, including Angola and Botswana, but overall progress on the continent is insufficient.[46] While the global goal of halving the proportion of people without sustainable access to safe drinking water and basic sanitation by 2015 may be met, this is mainly due to rapid improvements in East Asia. At current rates, Africa will achieve the targets only in 2040,[47] with some of the poorer countries not meeting them before 2050.

The challenges are enormous. Despite an increase of 11 per cent since 1990, only 60 per cent of Africans have access to improved sources of drinking water and more than half still do not have access to improved sanitation facilities.[48] In 14 countries, more than a quarter of the population still takes longer than 30 minutes to make one round trip to collect water. Disparities between rural and urban areas have also been growing fast.[49]

Most African countries have established national task forces and developed plans to reach the MDGs on water supply and sanitation. But plans are often neither country-owned nor actively implemented. Despite increased activity on the intergovernmental level, including through meetings of the African Ministers' Council on Water (AMCOW), the establishment of the African Water Facility (AWF), the dedication of the 11th AU Summit to water and sanitation, and the institutionalization of an annual African Water Week, African leaders have been slow to act at the national level. Many of the recommendations and commitments enshrined in documents such as the African Water Vision (2000), the Tunis Ministerial Declaration on Accelerating Water Security for Africa's Socioeconomic Development (2008), and the Sharm El-Sheikh Commitments for Accelerating the Achievement of Water and Sanitation Goals in Africa remain unfulfilled. The 2010 targets included in the eThekwini Declaration, including the allocation of 0.5 per cent of GDP for sanitation and hygiene, will also be missed by most countries. The G8–Africa Partnership on Water and Sanitation launched at the G8 Summit in L'Aquila may help to support the implementation of Africa's commitments.

IMPACT OF THE GLOBAL ECONOMIC CRISIS ON SOCIAL DEVELOPMENT

Although accurate data are not yet available to reveal the full impact of the economic crisis, they point to areas where progress towards the MDGs has slowed or reversed. Effects are being transmitted to African societies through several channels. In terms of public expenditure on social sectors, the crisis is not only squeezing the ability of African governments to sustain the levels of investments they were able to make over the past few years, but it is also resulting in declines in public expenditure on social sectors as a percentage of GDP. The lack of public social safety nets to offset the negative impacts on individuals and families is compounding the situation, with the working poor and other vulnerable groups enduring the greatest impacts of the crisis. The World Bank, for instance, predicts that between 30,000 and 50,000 African infants are expected to die as a result of the crisis, with most of those deaths occurring among those living in poverty.[50]

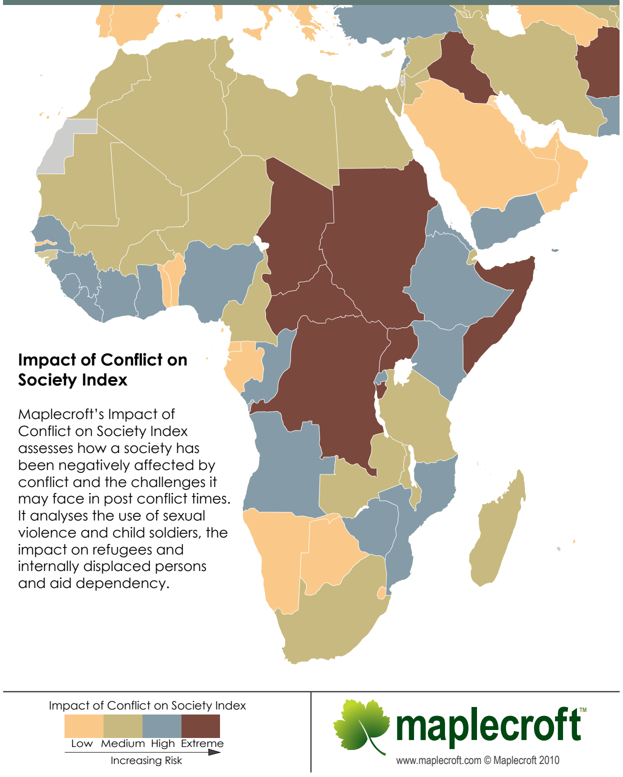
The working poor and other vulnerable groups are enduring the greatest impacts of the crisis

PEACE AND SECURITY

Africa continues to have the largest number of armed conflicts of any region. In early 2010, seven African countries (Central African Republic, Chad, Democratic Republic of Congo, Ethiopia, Darfur, Nigeria, Somalia, and Sudan) were experiencing major armed conflicts within their territory – and around one fifth of the continent's population was living in conflict zones. But there have also been a number of encouraging developments over the last five years, which are often overlooked.

The member states of the AU have made tangible progress in operationalizing the African Peace and Security Architecture (APSA) as a unique framework for joint action.[51] At least three of the five regional brigades making up the African Standby Force (ASF) are nearing completion on schedule, the Continental Early Warning System (CEWS) is operational, the Peace and Security Council (PSC) and the Panel of the Wise are meeting regularly, and capacity-building support from international actors like the EU, the UN, and the US has increased in terms of both quantity and quality. The regional economic communities have also continued to harmonize their security mechanisms in an effort to complement the continental initiatives of the AU, and there has been an increase in intergovernmental cooperation to tackle shared challenges like cross-border crime, drug trafficking and transnational terrorism.

The Impact of Conflict on Society



THE AFRICAN PEACE AND SECURITY ARCHITECTURE

The African Peace and Security Architecture is a significant improvement on previous attempts at continental security cooperation. Even though it is currently unable to fulfill the high expectations placed on it, the elaborateness of its structures, the existence of a broad consensus on its design and purpose, and the high degree of implementation – including the conduct of full-blown peace operations in Darfur, Somalia and the Comoros – testify to the increasing quality of inter-state security cooperation in Africa.

Source: Benedikt Franke, Security Cooperation in Africa: A Reappraisal (2009)

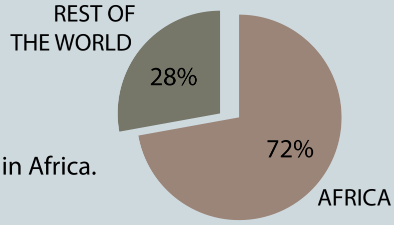
Africa continues to have the largest number of armed conflicts of any region

UN Peacekeeping Operations in Africa

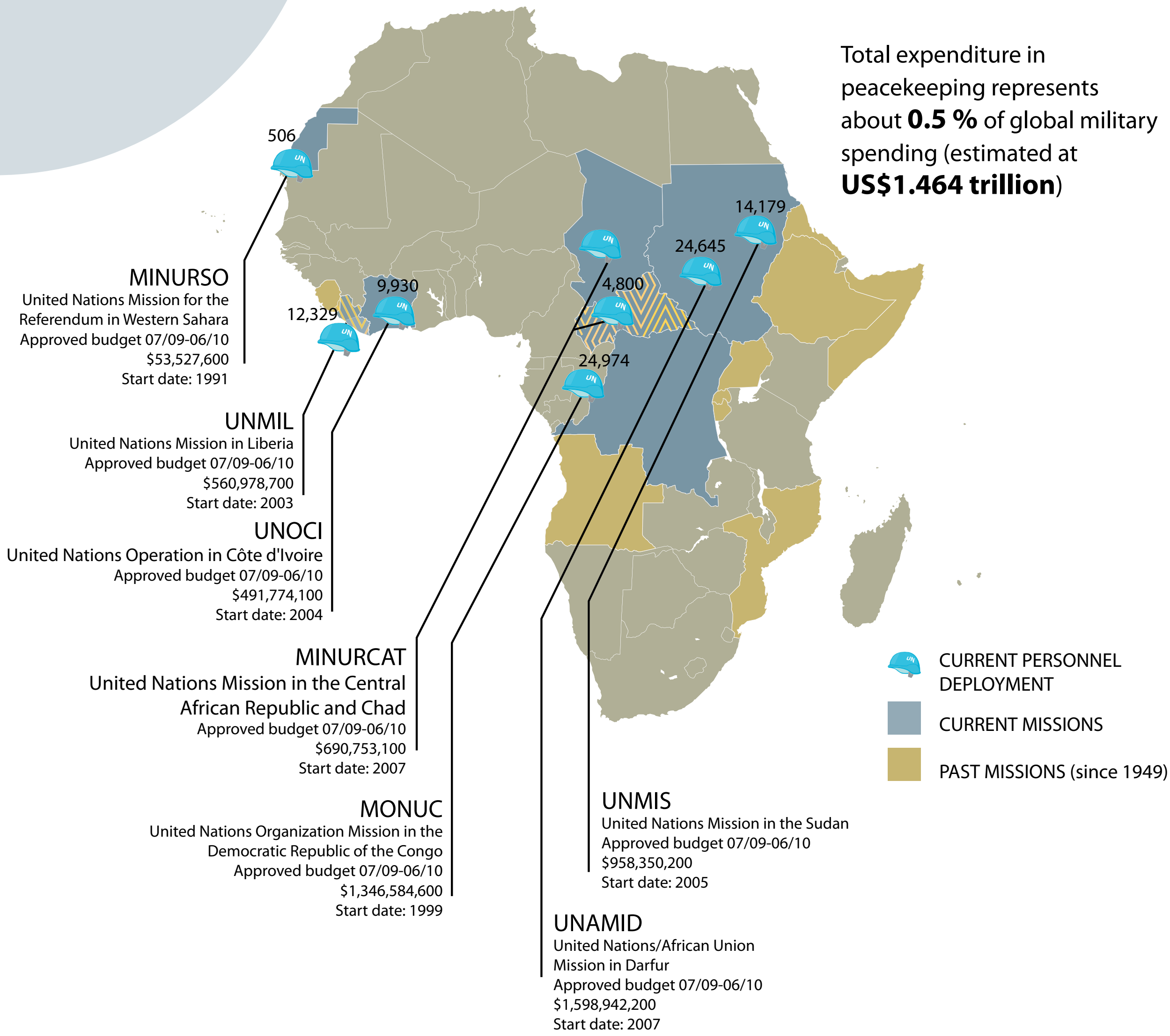
UN Peacekeeping Missions budget is aprox. **US $7.9 billion.**

from1 July 2009 to 30 June 2010

US$ **5.7 billion** (72%) is for operations in Africa.



Total expenditure in peacekeeping represents about **0.5 %** of global military spending (estimated at **US$1.464 trillion**)



Deployments to Africa increased by **400%** and deployments to Europe decreased by 68% between 1999 and 2008.

In 2010, Nigeria, Rwanda, Egypt and Ghana are in the top ten country contributors to UN peacekeeping troops. Ethiopia is number 11.

Asia (37%) and **Africa** (32%) provide the most civilian police.

Data Source: Data from UN DPKO Background Note (January 2010)

Unfortunately, there continues to be great need for such cooperation as well as international peace-support activities, including UN peacekeeping operations and peace-building support. The wars, rebellions and counter-rebellions in the Great Lakes Region, the seemingly never-ending conflicts in places like Darfur, Somalia and the Democratic Republic of Congo, the coups in Guinea, Guinea-Bissau, Mauritania, Madagascar and Niger, the surge of piracy around the Horn of Africa, the insurgency in the Niger Delta, the repeated massacres in Jos, and the uneasy truces in Zimbabwe and Kenya are all symptomatic of disconcerting trends. These include: the re-emergence of atomized and fluid forms of cross-border violence, often commercially linked; the expansion of ungovernable spaces; transnational militancy, organized crime and trafficking; and the continuation of violence after peace settlements. Many of these trends may be exacerbated as climate change increases the likelihood of large-scale population movements and conflict over scarce natural resources.

FOOD AND NUTRITION SECURITY

Sub-Saharan Africa continues to be the world's most food-insecure region.[52] A dire situation has been further aggravated by the consecutive food, energy, financial and economic crises. The Food and Agricultural Organization (FAO) estimates that 265 million people in Sub-Saharan Africa will suffer from undernourishment as a result of their combined fallout.[53]

Each statistic represents a personal tragedy. Faced with reduced access to food, millions of households are forced into unavoidable compromises such as replacing more with less nutritious food, selling productive assets, withdrawing children from school, forgoing healthcare, or simply eating less. Poor people are forced to draw down their already meagre assets, risking poverty traps and negatively affecting longer-term food security and socio-economic progress.

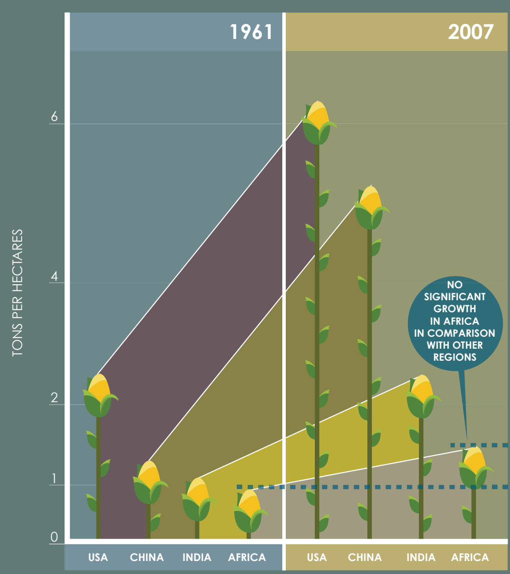
At least for the moment, the consecutive crises have propelled the tragic state of food security in Africa back onto the front pages of newspapers and closer to the top of policy-makers' agendas, as evidenced by the launch of the $20 billion L'Aquila Food Security Initiative at the G8 Summit in Italy, the commitment to scale up agricultural assistance to low-income countries made by the member states of the G20 in Pittsburgh, and the formation of a Global Partnership for Agriculture, Food Security and Nutrition at the 2009 World Food Summit.[54]

While the crises have highlighted the social consequences of neglecting agriculture, the fact that hunger was increasing even before the crises suggests that chronic and structural problems rather than temporary fluctuations continue to underlie much of Africa's food insecurity.[55] These problems include: the

THE STATE OF AFRICA'S GREEN REVOLUTION

The Green Revolution breakthroughs in cereal yields that propelled agricultural and overall economic growth in Asia have yet to take hold in most African countries. While the last five years have seen a new momentum towards a transformation of African agriculture, driven by national governments and multilateral institutions and supported by specialized civil-society organizations like the Alliance for a Green Revolution in Africa (AGRA), enormous challenges remain. Nonetheless, there are some encouraging success stories. Malawi, for example, transformed itself from a food-deficit country to a food-exporting country, with excess production over national consumption for four years in a row; and Rwanda's agriculture grew by 13 and 17 per cent, respectively, in 2008 and 2009. Unfortunately, such stories are still too rare.

The Green Revolution is yet to Reach Africa



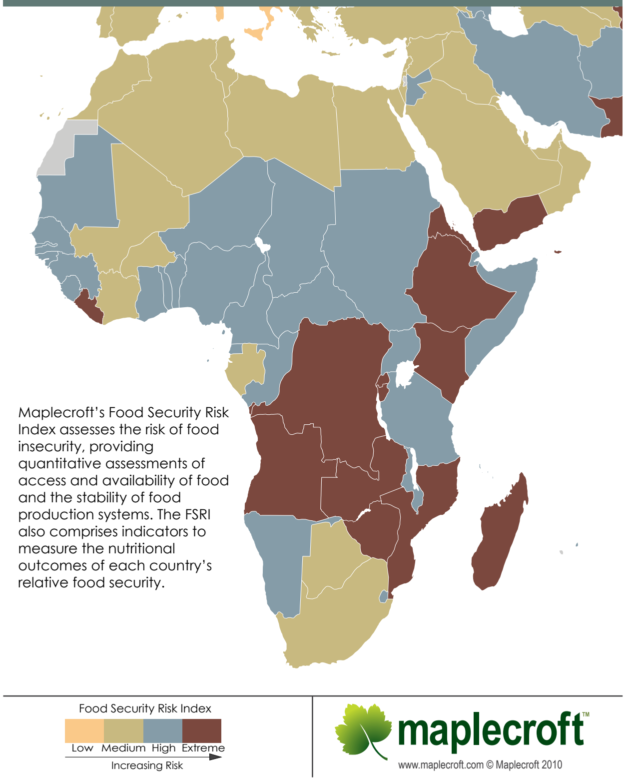
Source: The Bill and Melinda Gates Foundation (2009) growing demand for food as a result of changing food habits and rising incomes in emerging markets; growing competition between bio-fuels and food crops for limited land; low yields due to soil depletion, insufficient irrigation, and scarcity of production-enhancing inputs such as fertilizer and high-yielding seed varieties; unfair trade rules; widespread under-investment in agriculture; persistent inequalities between men and women in access to land and other essential production resources;[56] growing import dependency; a lack of reliable domestic markets and insufficient access to international markets; and the accentuation by climate change of existing environmental problems like soil erosion, desertification and water scarcity.

African governments have been slow in addressing these structural problems over the last five years, also because the international community has been laggard in supporting them. Many have not met the growth and spending targets of the Comprehensive Africa Agriculture Development Programme (CAADP), as outlined in the 2003 Maputo Declaration, and only 18 countries have signed national CAADP compacts. To date, only eight countries have reached the target of allocating at least 10 per cent of their national budgets to agriculture,[57] while a majority of governments are averaging no more than 4 per cent. Only Ethiopia, Gambia, Mali, Mozambique, Nigeria, Rwanda and Senegal have surpassed the programme threshold of 6 per cent agricultural growth in recent years.[58]

As a result, there has been insufficient progress with respect to many important issues including those related to land and its efficient utilization, investment in rural infrastructure (particularly feeder roads), irrigation systems as well as storage and processing facilities, protection of natural resources, the strengthening of domestic and the opening of international food markets; and reduction of the vulnerability of smallholder farmers. The growing interest of foreign investors in the continent's agricultural lands presents African policymakers with yet another challenge.

Despite a significant increase in donor attention, the rapid spread of new technologies improving farmers' access to information and services, and the well-known potential of its resource base, Africa is thus still far from being able to feed itself. Millions of farmers and their families remain trapped in poverty, and hunger-reduction targets are unlikely to be met.

Food Security Risk Index



UP FOR GRABS? AFRICA'S LAND AND FOREIGN INVESTORS

The recent surge of large-scale acquisitions of African farmland by international investors, dubbed "land grabs" by the media, has sparked a major debate. While the deals reaching up to individual sizes of several hundred thousand hectares promise jobs, and investment in infrastructure and technology, there are also substantial risks. Not only may such land acquisitions result in the displacement of local people and lead to civil strife, as was the case in Madagascar in 2009, but the high proportion of products destined for export, as well as the long duration of most leases, may exacerbate Africa's food insecurity. Given that decisions taken now will have major repercussions on the livelihoods and food security of many people for decades to come, ensuring fair and transparent deals as well as designing effective safeguards in national law is of the utmost importance. For this reason, AGRA, FAO, IFAD, UNCTAD and the World Bank are currently developing a code of conduct and a set of standardised practices.

Only eight countries have reached the target of allocating at least 10 per cent of their national budgets to agriculture

CLIMATE CHANGE

UNDER EMBARGO UNTIL 25 MAY 2010

The growing prominence of the climate challenge has been one of the most significant developments of the last five years. It is ever more evident that current patterns of high-carbon economic growth are simply not sustainable. The effects of climate change are placing additional burdens on national and local economies, livelihoods, social services and already overstretched communities. The policy space in which the continent's leaders operate is fundamentally changing. Substantial new financing is needed to help Africa to adapt to and mitigate the effects of climate change. However, climate change has not only created additional hurdles to development, but also offers the continent new chances to profit from its vast carbon sinks, leapfrog dirty technologies, and embark on a path of low-carbon growth and clean development.

THE IMPACT OF CLIMATE CHANGE

Despite some errors that have recently been uncovered in the 2007 report of the Intergovernmental Panel on Climate Change (IPCC), the scientific evidence that the Earth is heating up rapidly remains incontrovertible. In Africa, the effects of climate change are already a reality that is affecting the lives of millions of people. As precipitation patterns are changing and crops are reaching the upper limits of heat tolerance, African countries are finding it increasingly difficult to feed their people, protect them from the vagaries of nature, grow their economies and conserve their environments.[59]

Climate change is also increasing the risk of droughts, water stress, and new health threats resulting from expanded transmission zones for vector-borne diseases and the changing frequency and intensity of extreme weather events.[60] Heightened vulnerabilities and increasing competition for arable land and access to water are also increasing the likelihood of mass migration and political instability. This reality is threatening to overwhelm fragile communities and adds to the multiple insecurities of millions of Africans.

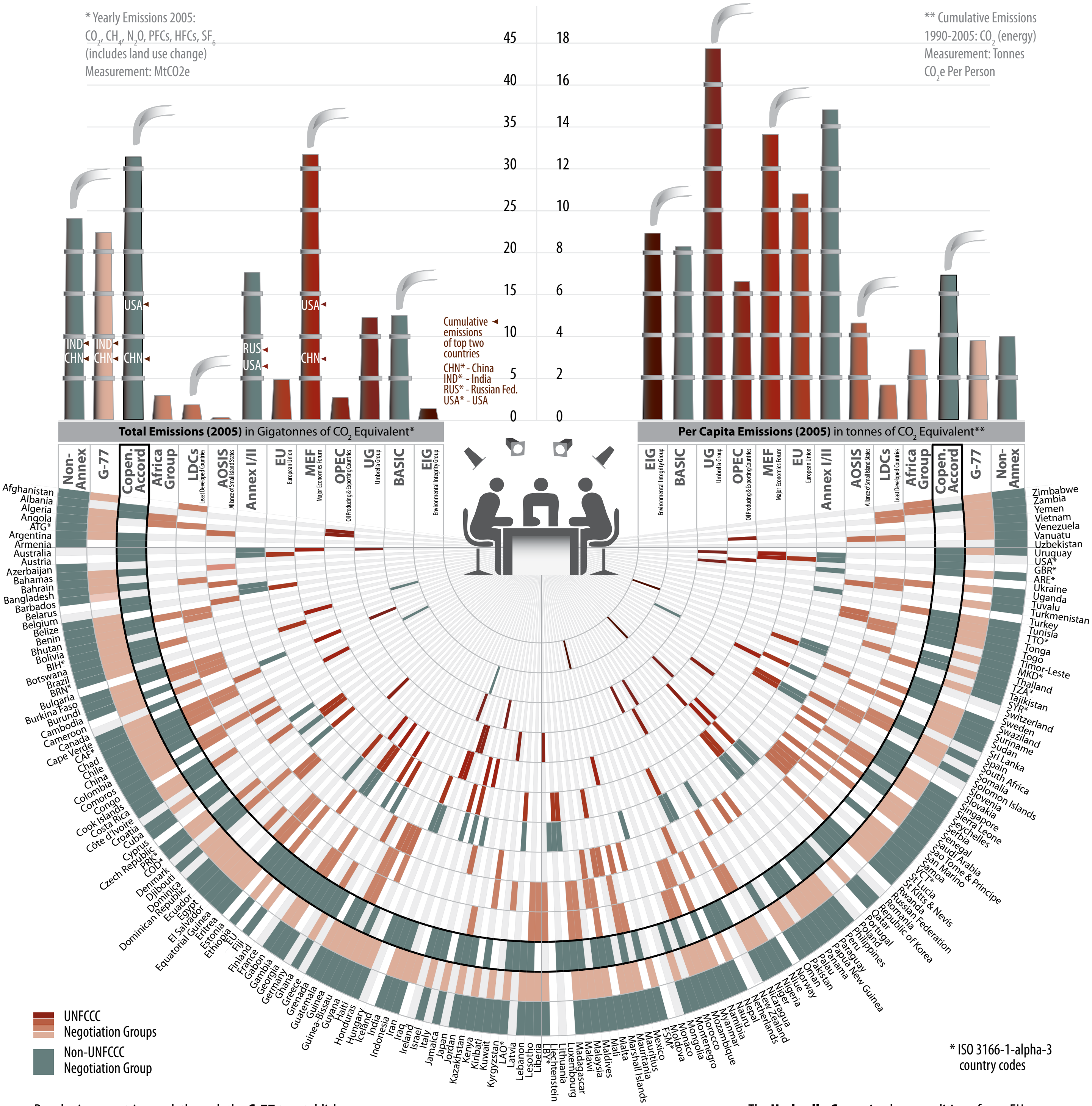
CLIMATE CHANGE POLITICS

Increasingly aware of the need to mitigate and adapt to key environmental changes that directly affect the livelihoods of people, African governments have taken a number of steps. Nationally, many of them have formulated National Adaptation Programmes of Action and are pursuing reforms to encourage sustainable land management and combat deforestation. They have also established national disaster-management organizations and partnered with the European Union (EU), the UN Environment Programme (UNEP), the AfDB, regional economic communities and local authorities to implement projects such as the Congo Basin Convergence Plan on Forests and the AU/NEPAD Green Wall for the Sahara Initiative.

On the international level, African governments took a series of unprecedented steps to arrive at a common negotiation position for the COP 15 Copenhagen Summit. Even though the meeting did not result in a binding international framework, Africa's intensified regional cooperation, as well as the recognition of the enormous benefits of speaking with one voice, provide African leaders with a basis for moving forward. Institutionally, African leaders can build on mechanisms like the African Ministerial Conference on the Environment (AMCEN), the AU's Conference of African Heads of State and Government on Climate Change (CAHOSCC), and the Climate for Development in Africa Initiative, which intends to improve Africa's analytical capacity, knowledge management and access to information on climate change. The selection of Prime Minister Meles Zenawi of Ethiopia as co-chair of the UN's recently established High-Level Panel on Climate Change Financing is yet another recognition of both Africa's special needs and the substantial contributions it can make to developing global solutions to the climate challenge.

Substantial new finance is needed to help Africa to adapt to and mitigate the effects of climate change

Climate Change Negotiating Groups and Emissions



Developing countries work through the **G-77** to establish common negotiating positions. The country holding the Chair of the G-77 often speaks for the G-77 and China as a whole.

The **Africa Group** is composed of 53 countries, and developed a common negotiating position.

The **AOSIS** is a coalition of 43 low-lying and small island countries, most of which are members of the G-77, that are particularly vulnerable to sea-level rise.

50 countries defined as **LDCs** have become increasingly active in the climate change process, often working together to defend their particular interests, for example with regard to vulnerability and adaptation to climate change.

The 27 members of the **EU** meet in private to agree on common negotiating positions. The EU Presidency speaks its members.

The **Umbrella Group** is a loose coalition of non-EU developed countries which formed following the adoption of the Kyoto Protocol.

The **EIG**, comprises Mexico, South Korea and Switzerland.

Several other groups also work together in the climate change process, including countries from the **OPEC**, the League of Arab States and the Agence intergouvernementale de la francophonie.

Data Source: World Research Institute, Climate Analysis Indicators Tool (2010)

AFRICA @ COPENHAGEN

The Copenhagen Summit revealed the fragility of international consensus on how to tackle climate change. Many hoped that it would be a watershed in world affairs. In retrospect, expectations as to what it could deliver – such as a binding agreement on limiting emissions – were unrealistic, but even so, it was a disappointment; the Accord which emerged was "noted" rather than "adopted" and resulted from a deeply imperfect process and last minute compromise. It does, however, recognise the enormity of the climate challenge, and the need to limit temperature rise to below 2 degrees Celsius. Africa played a significant role before and during the Summit, fielding a common negotiating team, backing a common position and appointing a spokesman, Meles Zenawi. This concerted approach helped shape the contents of the Accord, notably regarding additional financing by developed to developing countries to support adaptation, mitigation, REDD-plus, technology transfer and capacity building - $30 billion for 2010 – 2012, and $100 billion p.a. by 2020. Nonetheless, major uncertainties persist, including the sources, management, accessibility and disbursement of the proposed funding.

Much remains to be done to ensure that Africa is assisted with the finance and technology necessary to meet the increased challenges to development and that it is not locked into a permanently low share of the global commons. The decisions entailed in the Copenhagen Accord need to be operationalised and the level and disbursement of promised funding needs to be clarified. The world is still far from a binding agreement and many of the support measures already agreed, including the Clean Development Mechanism (CDM) and the Reduced Emissions from Deforestation and Forest Degradation (REDD) scheme, have yet to either take hold on the continent or be operationalised.

DEVELOPMENT FINANCE AND COOPERATION

While the bulk of development finance available to African governments comes from domestic revenues,[61] development assistance provided by international partners continues to play an important lubricating role, particularly in light of the global economic downturn. It leverages other flows and helps ensure that they achieve results. The last five years have seen noteworthy developments in the levels and types of aid provided by traditional donors, the increasing engagement of emerging economies like China, India and Brazil, the continuing rise of private giving, the extension of debt relief, and a renewed discussion on aid effectiveness.

TRADITIONAL PARTNERS

A number of commitments were made by different donors in 2005, in relation to both total aid volume and aid to Sub-Saharan Africa. The most prominent commitment was made by the members of the G8 at their summit in Gleneagles, where they pledged to double development assistance to Africa by 2010. While global ODA has indeed risen in nominal terms, and 2009 saw the biggest increase by the G8 in ODA levels in any single year since Gleneagles, the G8 as a whole remains significantly off track with respect to its aid commitments to Africa ever since the promises were made.

The global economic crisis has now deflated the hope that the 2010 targets would be met. While a small number of countries such as the US met their commitments, others, notably large European donors such as Italy, have postponed or abandoned their pledges. Unfortunately, the G8 Summit in L'Aquila failed to renew the consensus on development as pressures on both the concept and levels of ODA mount.

As a result, figures released by the OECD's Development Assistance Committee (DAC) in April 2010 show a marked deceleration in the increase of global ODA in 2009 and 2010.[62] It is estimated that this will lead to an overall aid shortfall of around $21 billion, and that Africa in particular is likely to receive only about $11 billion of the $25 billion increase (in 2004 prices) envisaged at Gleneagles – a staggering shortfall of around 56 per cent.[63] Part of the reductions in total aid levels result from falling gross national incomes on which ODA calculations are based (potentially as much as $8.6 billion) and exchange rate movements (in the range of $3–5 billion).

THE 2009 G8 SUMMIT IN L'AQUILA

Despite repeated claims to the contrary, Africa did not feature prominently on the agenda of the Italian G8 Presidency. Overshadowed by the global economic crisis, the leaders of Algeria, Angola, Egypt, Nigeria, Senegal and South Africa, the Chair of the African Union (Libya), the President of the African Union Commission, and the Chair of the NEPAD Implementation Committee (Ethiopia) were invited to discuss a limited range of topics, including the preservation of the Congo Basin and the operationalisation of the African Peace and Security Architecture. The only notable outcomes were a Joint Statement on Water and Sanitation and the L'Aquila Food Security Initiative which are both yet to be operationalised.

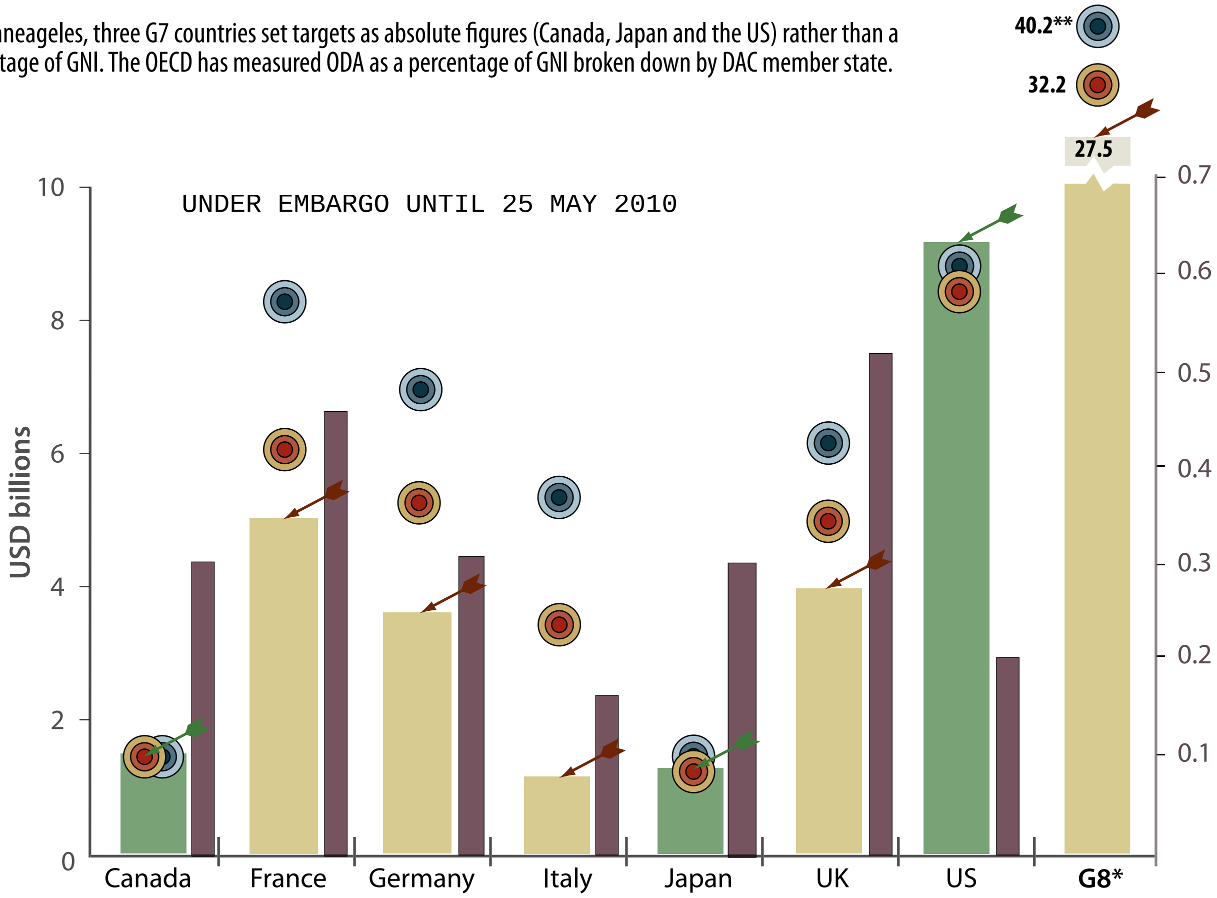
ODA UNDER ASSAULT

The very concept of official development assistance (ODA) has come under assault from a number of directions over the last couple of years. It has been suggested that countries can use the capital markets rather than ODA for their financing needs, but for many, this is simply not an option. Some donors are again proposing that costs of peace operations and military assistance and even of the provision of political asylum be included in the calculation of development assistance. There are also concerns that additional demands created by climate change will be met from ODA coffers and not be truly additional. Both would effectively reduce the absolute amount available to traditional development assistance.

The bulk of development finance available to African governments comes from domestic revenues

Tracking Gleneagles Commitments

At Gleaneagles, three G7 countries set targets as absolute figures (Canada, Japan and the US) rather than a percentage of GNI. The OECD has measured ODA as a percentage of GNI broken down by DAC member state.

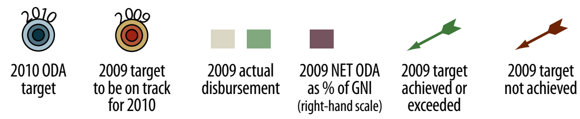


	Canada	France	Germany	Italy	Japan	UK	US	G8*
2009 target to be on track to achieve 2010 target	1.50	6.06	5.25	3.42	1.23	4.99	8.43	**32.16**
2009 actual disbursements	1.53	5.04	3.62	1.16	1.29	3.98	9.17	**27.53**
2010 target	1.50	8.27	6.96	5.35	1.42	6.18	8.80	**40.23****

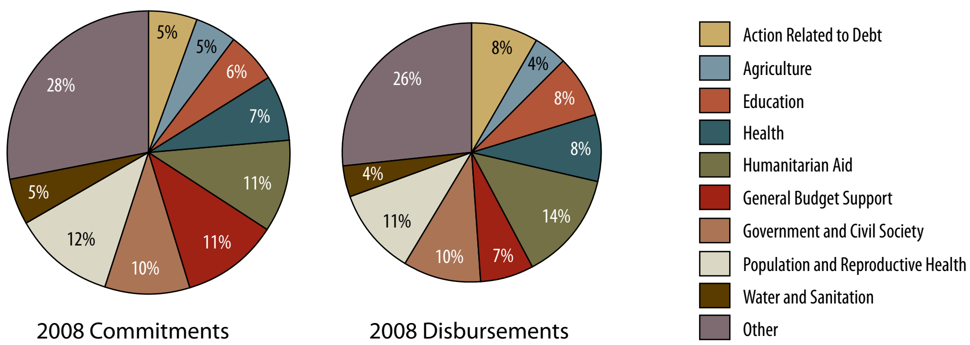
(USD billions - 2009 prices)

	Canada	France	Germany	Italy	Japan	UK	US	G8*
2009 NET ODA as % of GNI	**0.30**	**0.46**	**0.35**	**0.16**	**0.18**	**0.52**	**0.20**	

* Russia did not make any ODA commitments
** Revised down due to decrease in GNI and certain donors revising their targets (France and Canada)



OECD/DAC Total ODA by Sector



2008 Commitments **$47.07 billion** (In 2008 prices) 2008 Disbursements **$39.45 billion**

Source: The DATA Report, ONE (2010)
For more information on ODA figures, please see ONE website www.one.org

NEW PARTNERS

The importance of emerging economies like Brazil, China and India to Africa's development is growing by the day. As some of the continent's largest trading partners and sources of investment, they have been instrumental in boosting growth rates and spurring much needed infrastructure improvements in Africa for many years. Over the last five years in particular, their involvement has evolved from a narrow focus on resource and energy security to encompass a much broader agenda of cooperation, including the sharing of developmental experiences and the provision of substantial financial and technical assistance.

While DAC donors still account for a large part of reported aid flows to Africa, the growing willingness and ability of non-DAC countries to provide grants and concessional finance has not only increased the resources available for development, but has also diversified the financing options open to countries in the region. In particular, its sectoral focus (on infrastructure and productive sectors), the absence of policy conditionality, and the underlying non-Western development models have made non-DAC aid an attractive alternative for many African countries.[64]

China especially has realized the political benefits of styling its commercial engagement in Africa as South–South partnership, and complementing it with a comprehensive development cooperation agenda. Its Forum on China–Africa Cooperation (FOCAC) has evolved into an important platform for making ambitious pledges and commitments to the region and, since its creation in 2000, has become a model for other Southern partners. At the last meeting in November 2009, China announced eight new measures for boosting development cooperation with Africa over the period 2010–12, totalling well over $12 billion.

Selected Features of Assistance provided by Africa's Development Partners

	OECD-DAC Countries	Brazil	Turkey	Arab countries	India	China	Korea
Africa's Share of Aid Budget	35%	27-30%	6%	11%	1.5-3.6%	30-50%	15%
Aid Type	mostly grants	co-financing often through triangular cooperation	grants	grants & loans	grants & loans	grants & loans	grants & loans
Conditions Imposed	policy & non-policy	non-policy			non-policy	non-policy	
Mode of Delivery	moving away from projects in favour of SWAps & budget support	project	project	project	project	project	project
Debt Relief used as Support Instrument	✓	✓	✗	✓	✓	✓	✓

Source: UNCTAD, Economic Development in Africa Report (2010)

The willingness of non-DAC countries to provide grants and concessional finance has diversified financing options open to Africa

CHINA'S COMMITMENTS AT THE 2009 FOCAC CONFERENCE

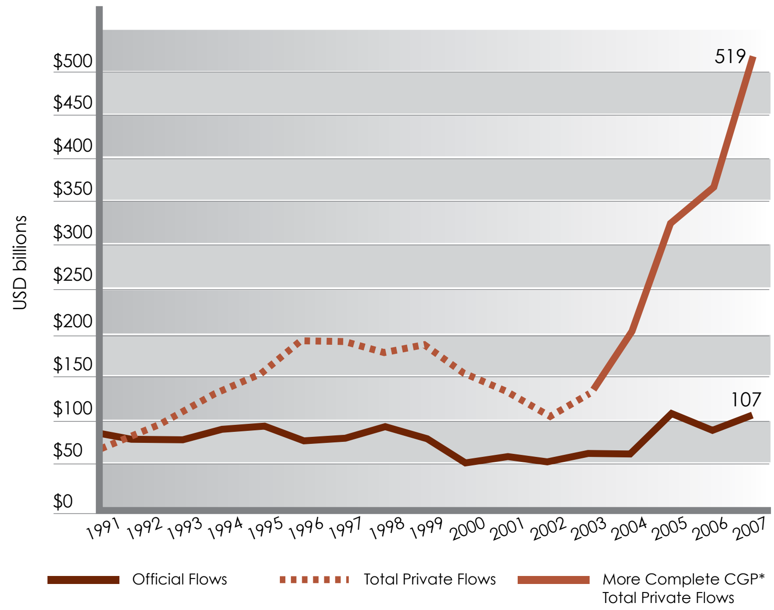
1. In the next three years, provide $10 billion of preferential loans to African countries, which will be used mainly to support infrastructure and social development projects.
2. Increase the size of the China–Africa Development Fund to $3 billion to support the expansion of investment from Chinese businesses to Africa.
3. Establish, through Chinese financial institutions, a special loan of $1 billion for the development of African small and medium-sized enterprises (SMEs).
4. Grant, in a phased manner, tariff-exemption treatment to 95 per cent of exports from the least developed countries in Africa having diplomatic relations with China.
5. Contribute $30 million to an FAO trust fund to support South–South cooperation between China and African countries.
6. In the course of the next three years, send 50 agricultural-technology teams to Africa, help train 2000 agricultural technicians for African countries, and increase to 20 the total number of agricultural technology centres built for African countries. Also in the course of the next three years, train 20,000 African professionals, build 50 China–Africa friendship schools, train 1500 head teachers, increase the number of Chinese government scholarships offered to Africa to 5500, and admit 200 high-level African administrative personnel to MPA programmes in China.
7. Establish an African commodities trade centre in China to promote export of African commodities to China.
8. Establish three to five logistics centres in Africa to help improve business facilities in African countries.

PHILANTHROPY AND PRIVATE GIVING

Over the last five years, charitable giving to developing countries by individuals, foundations such as the Bill and Melinda Gates Foundation or the Ford Foundation, companies and other organizations has increased rapidly, in some countries such as the US even overtaking official development assistance. According to the 2009 Index of Global Philanthropy and Remittances, Africa continues to be the greatest beneficiary of this surge.[65] Despite the global economic downturn and the resultant reductions in foundation assets and personal wealth, private giving is not expected to decline significantly in 2010. On the contrary, the spread of innovative models of charitable giving and lending such as the use of web-based platforms like MyC4 or Kiva and the projected decline of official development assistance and remittances may actually mean that its share of total capital inflows will increase even further.

ODA vs. Philanthrophy

TOTAL OFFICIAL AND TOTAL PRIVATE FLOWS - PHILANTHROPY, REMITTANCES, INVESTMENT - FROM OECD DONOR COUNTRIES TO DEVELOPING COUNTRIES, 1991-2007



* Hudson Institute's Center for Global Prosperity (CGP) index includes calculations of other private flows from corporations, foundations, charities, individuals, universities, and religious organisations.

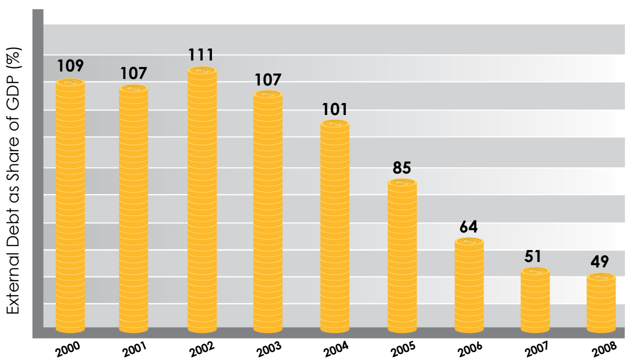
Source: Hudson Institute, Index of Global Philanthropy and Remittances (2009)

DEBT RELIEF

Over the last five years, significant progress has been made in reducing the burden of external debt.[66] While Africa's external debt still stands at more than $200 billion,[67] its share of GDP has fallen from above 100 per cent in 2000 to less than 50 per cent in 2008. As of May 2010, 21 African countries had reached the completion point of the Highly Indebted Poor Countries (HIPC) programme, thus qualifying for irrevocable debt relief, and another 11 were going through different stages of the process.[68] Additional relief has been provided through associated programmes like the Multilateral Debt Relief Initiative (MDRI), bilateral initiatives and conversion programmes like the Global Fund's *Debt2Health* Initiative. Encouragingly, a recent AfDB study has found that debt-relief resources were more easily transformed into MDG-related spending than were other aid forms.[69]

Despite the progress made, massive debt burdens continue to constrain the development prospects of many African countries. Both the global economic crisis and the increasing extension of concessional loans by Southern partners have renewed concerns about debt sustainability and the possibility of a new debt crisis in the region.

External Debt as a share of GDP



Source: AfDB, Debt Relief Initiatives, Development Assistance and Service Delivery in Africa (2009)

AID EFFECTIVENESS

Progress in implementing the aid-effectiveness agenda outlined in the Paris Declaration on Aid Effectiveness (March 2005) and the Accra Agenda for Action (September 2008) remains too slow to make a material difference to the achievement of the MDGs. The latest OECD Monitoring Survey shows that on average only 45 per cent of aid is delivered on schedule causing an estimated dead weight loss of as much as $16 billion a year, or 15-20 per cent of total aid. There remain significant problems including unnecessarily high transaction and administration costs due to a proliferation of initiatives and a lack of coordination, medium- and long-term unpredictability, a lack of alignment to country systems, and a fragmented aid architecture.[70] As a result, OECD donors are unlikely to meet the 2010 benchmarks they have set themselves for the implementation of the Paris Declaration.[71]

The allocation of aid resources continues to reflect political interests rather than development priorities. Too little aid goes to the most needy or is used to improve recipient countries' capacity for domestic revenue mobilization.[72] Also, aid is often still delivered in ways that are not designed to strengthen or that even undermine the social contract between government and citizens.

However, there is also encouraging news. The European Union in particular has made great strides in improving the coherence and effectiveness of its aid policies through the adoption of a Code of Conduct on Complementarity and the Division of Labour (May 2007) and the Lisbon Treaty (December 2009). Both could help to reduce overlap, cut transaction costs, and ensure more efficient aid. Given the growing tendency of donor countries to repackage and recycle money and for commitments to be increasingly opaque, initiatives such as the International Aid Transparency Initiative and the Charter for a Good Promise are to be welcomed.

THE INTERNATIONAL AID TRANSPARENCY INITIATIVE

The International Aid Transparency Initiative (IATI) was agreed in Accra in 2008. Eighteen donors, accounting for about half of global ODA, have committed themselves to agree a standard for the publication of aid information, including the scope, level of detail and a set of common definitions which are essential to enable the information to be usable not just by governments but also by parliaments, civil society and citizens. At the time of writing, the IATI donors were on course to agree a draft standard by August 2010.

There are renewed concerns about debt sustainability and the possibility of a new debt crisis in the region

PART II
REALIZING THE PROMISE

The last five years paint a truly mixed picture of Africa. While enormous challenges remain in virtually all sectors and all countries, there are myriad signs of hope and progress. Many sensible policies and plans have been put in place. The basis for transforming the continent has improved and we have reached an important juncture at which the trajectory of Africa's progress will be defined for many years to come. Consequently, the second half of our report looks forward and presents six policy recommendations. The first three recommendations are intended for African policymakers who have the primary responsibility for driving efforts to achieve sustainable economic growth, poverty reduction and security, and the second three are for international policymakers who need to provide an international environment that is fair and supportive of their efforts. If implemented, we believe that these six recommendations will enable the continent to realize its vast promise, for the benefit of its people and the world at large.

AFRICAN LEADERS NEED TO...

IMPROVE MANAGEMENT OF RELATIONSHIPS AND ASSETS

Africa's geostrategic importance is increasingly evident – its land, mineral, human and natural resources are growing in value both to business and as assets in the fight against climate change. This brings opportunities for economic transformation and social development, but also entails threats including illicit exploitation of people and resources. It is a sad truth that Africans beyond elite circles are still not benefiting sufficiently from the revenues and partnerships around what is increasingly referred to as a new "scramble for Africa". As a result, many opportunities to scale up successes in improving food and human security, local entrepreneurship and to "climate-proof" economic development are being missed.

ENSURE MUTUALLY BENEFICIAL PARTNERSHIPS

We believe that Africa's leaders can be much more assertive in building effective and mutually beneficial partnerships around efforts to accelerate social and economic development. While this applies to all partnerships, whether old or new, political or economic, with the public or private sectors, the most urgent need is to improve the increasingly important relationships with countries from the global South.

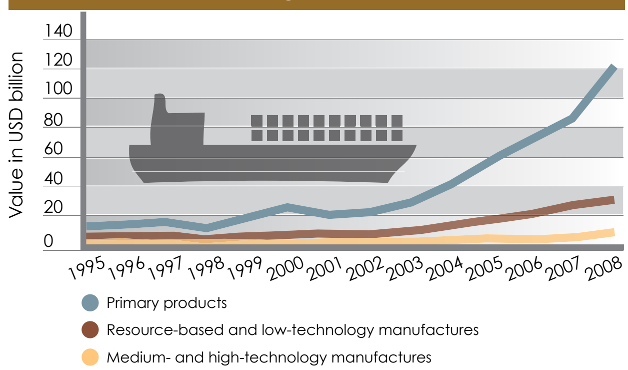
The commercial engagement of Southern actors is already having a substantial developmental impact on Africa. It boosts export and economic growth and provides opportunities for countries otherwise neglected, or even altogether ignored, by investors and financiers. Their investments are also helping African countries to diversify their economies, address infrastructure deficits, lower the cost of doing business, and facilitate trade. Cheaper goods and services from these countries have also yielded substantial welfare gains for African consumers, even though there is some concern that they are crowding out African producers.[73]

But much more is possible – and necessary. The growing engagement of Southern actors like China is raising legitimate concerns. For instance, their trade with, and investment in, Africa is not necessarily converted into growth and poverty reduction across the continent. With the exception of leading oil and mineral producers, African countries also have considerable trade imbalances with such countries. Their exports to them are dominated by low-value raw materials, such as unrefined fuels (accounting for 67.2 per cent of Africa's exports to developing countries),[74] minerals and timber, while processed goods, especially in agriculture, face both tariff and non-tariff barriers.

The growing value of investment and loans extended by emerging economies to Africa also raise concerns about debt sustainability, risk-sharing and cost recovery. The non-transparent nature of many deals, moreover, has raised concerns around the degree to which political accountability mechanisms in Africa are undermined, deliberately or unwittingly, by the growing engagement of countries like China.[75]

There is thus great scope to improve Africa's partnerships with the global South. The main challenge for African leaders is to manage these and other partnerships in a way that generates tangible benefits for their citizens through sustainable economic growth and poverty reduction. For that they need to realize that benefits of increasing economic ties are not automatic, but accrue only to those that take adequate and pro-active steps to exploit them through targeted policies. This is particularly important in the aftermath of the global economic crisis, as developing countries are likely to play an important role in helping Africa to recover.[76]

African exports to developing countries in other regions, 1995-2008

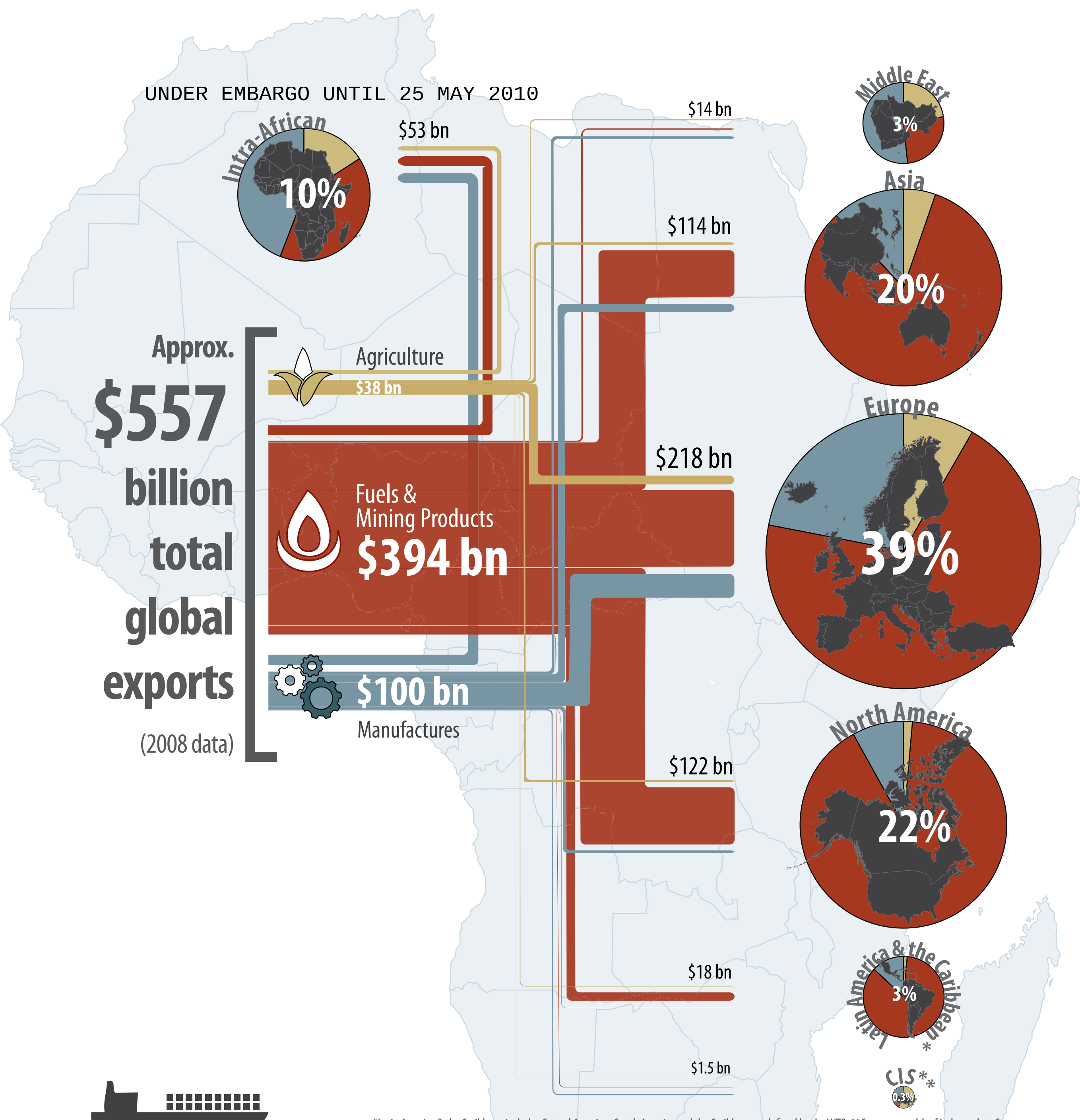


Source: UNCTAD (2010)

The most urgent need is to improve the increasingly important relationships with countries from the global South

African Exports by Type and Destination

UNDER EMBARGO UNTIL 25 MAY 2010



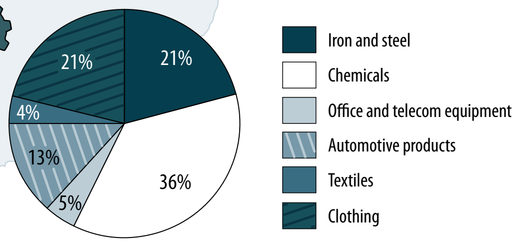
*Latin America & the Caribbean includes Central America, South America and the Caribbean as defined by the WTO **Commonwealth of Independent States

THE NUMBERS
Africa's Global Exports

Annual percentage increase of Fuels & Mining products, Agriculture, and Manufactures (2000 - 2008)

10%	22%	14%
Agriculture	Fuels & Mining Products	Manufactures

Composition of Africa's manufacturing exports in 2008



Source: International Trade Statistics, World Trade Organization (2009)

TURN RESOURCES INTO RESULTS

Africa's natural wealth is immense and most African countries rely on revenues from its export to manage their economies. However, the social, environmental and political costs of its extraction are high, and often outweigh the financial and economic benefits created to the public. This is particularly so for local communities whose health, livelihoods and rights are often negatively affected and who are generally not consulted in the design, management and implementation of projects.[77] The division of labour evident in the current export patterns – resources are generally not processed in Africa – is clearly not conducive to the policy goals of diversifying Africa's economies and using trade to enhance the industrial development of the continent. Instead, it prevents the emergence of competitive manufacturing sectors and reduces the potential positive domestic carry-on effects of resource extraction to a mere trickle. Like the enormous illicit financial outflows,[78] this effectively reduces the resources available to African governments for promoting poverty alleviation and economic growth.

African leaders in countries fortunate to have valuable resources must work to overcome this gap between their countries' wealth and the meagre benefits its extraction brings to their people. They can do so by implementing appropriate policies to turn resources into tangible development results. Increasing the transparency of deals by joining initiatives like Extractive industries Transparency initiative (EITI), which aim to improve governance through the verification and full

AFRICA'S RENEWABLE RESOURCES

Africa has enormous potential for energy production from renewable sources – solar, hydro, wind and geothermal. Almost all Sub-Saharan African countries have sufficient renewable resources, exploitable with current technologies, to satisfy many times their current energy demands. African leaders need to harness these opportunities through targeted subsidies and other economic incentives to reduce energy poverty, improve reliability and achieve clean growth. At the same time, they need to ensure that envisaged large-scale projects like the Desertec initiative, which aims to supply 15 per cent of Europe's energy needs with solar power from the Sahara desert by 2050, are designed to add social and environmental value and do not repeat the mistakes of other extractive industries.

Africa's Natural Wealth

Some facts

OIL - Africa holds 9% of the world's proven oil reserves but is believed to have significant undiscovered reserves. As a result, countries like China, which receives now about one third of its oil imports from Africa and the US which aims for 25%, are seeking to increase its oil imports from the continent.

Source: Council on Foreign Relations, 2008

GOLD - South Africa holds 40% of gold world's reserves and is the third world producer (2009) with about 9% of the global production. The country remains one of the world's primary precious metals producers.

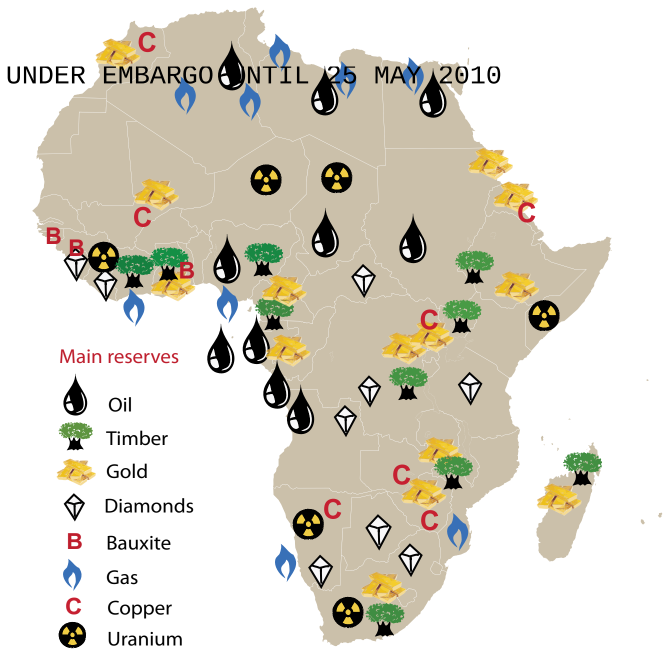
Source: Goldnews.bullionvault.com, 2010

DIAMONDS - Six out of the world's top ten diamond producer countries are in Africa and an estimated 65% of the world's diamonds come from the continent.

Source: Diamondfacts.org, 2010

GAS - Algeria is the eighth-largest natural gas reserves in the world and the second largest producer among OPEC countries. Energy exports are the backbone of the Algerian economy and domestic use of natural gas represents 60% of the total energy consumption.

Sources: BBC Country Profiles and Oil and Gas Journal, 2009



Data Source: APP, various sources

African countries must overcome the gap between their countries' wealth and the meagre benefits its extraction brings to their people publication of company payments and government revenues from oil, gas, and mining, is a first step. But if citizens are to reap the benefits from resource revenues, transparency is needed throughout the entire resource stream, from how contracts are awarded and monitored, to how taxes and royalties are collected, and how investment choices are made and executed. There are some positive signs already. Niger and Liberia have approached their partners for technical legal assistance on awarding contracts. In Mozambique and Tanzania, analytical work is helping to foster a dialogue on public-expenditure management and financial accountability in the context of rising revenues from mineral extraction.[79]

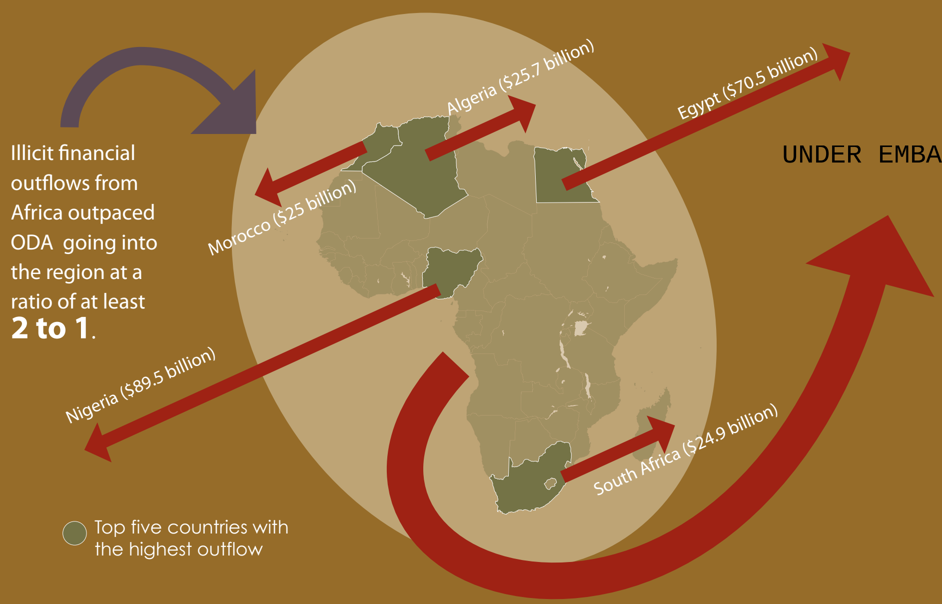
African leaders need to go beyond getting fair and transparent deals for their citizens. They also need to address the disadvantageous division of labour that still characterizes the extraction of the continent's natural wealth and leaves most of the benefits of value-adding to those outside Africa. As the crisis has reminded us, resource-rich countries also need to prepare for a time when oil and mining resources might be depleted, by diversifying their sources of growth. This requires major policy shifts and significant investments of resources in institutions, human capacities, health, education and infrastructure.

ILLICIT FINANCIAL FLOWS FROM AFRICA: UNTAPPED RESOURCE FOR DEVELOPMENT

According to a recent report by Global Financial Integrity, total illicit outflows from the continent across the last 39 years could be as high as $1.8 trillion, almost double the total amount of aid and assistance provided over the same period. The estimate for 2008 alone is as high as $37-53 billion. This massive flow of illicit money is facilitated by a global shadow financial system comprising tax havens, secrecy jurisdictions, disguised corporations, anonymous trust accounts, fake foundations, trade mispricing and money-laundering techniques. The negative effects of this outflow are staggering. According to the report, it drains hard currency reserves, heightens inflation, reduces tax collection, cancels investments, and undermines free trade.

Illicit Financial Flows 1970 - 2008

Between 1970 to 2008, total illicit financial outflows from Africa (conservatively estimated) were approximately $854 billion and grew at an average rate of 11.9 per cent per year.



Total illicit outflows,once mispricing of services and smuggling is added, is estimated at

$1.8 trillion USD.

Data Source: Global Financial Integrity, Illicit Financial Flows from Africa (2010)

AFRICAN LEADERS NEED TO...

LEVERAGE KEY OPPORTUNITIES AND TRENDS

African leaders can take advantage of a number of specific global events to support their efforts around national development and partnership building. The Football World Cup in June, the MDG Review Summit in September, and the COP 16 Cancun Summit in December are all great opportunities to showcase the continent's progress, communicate regional priorities and national needs, and rebuild the consensus on sustainable development and mutual accountability that is so essential to Africa's future. Beyond these specific events, there are also broader trends, which, if harnessed skilfully by African leaders and their international partners, can have potentially transformative effects on growth and development across the continent.

KEY OPPORTUNITIES IN 2010

Opportunity 1: The Football World Cup

In June, the Football World Cup is being held on African soil for the first time in its 80-year history. The eyes of the world will be on the host country and continent for over a month. This provides Africa's leaders and people with an opportunity to showcase the continent's untold stories of success and puncture the negative stereotypes about Africa. The challenge for African leaders is to ensure that media coverage increases understanding and practical support for Africa's economic and social development and its ability to prevent and manage conflict. Other than an African team winning, this would be the best legacy of the World Cup.

Opportunity 2: The 2010 MDG Review Conference

In July 2009, the UN General Assembly took the decision to hold a high-level plenary meeting in September 2010 to assess progress on the MDGs and map out the strategy until 2015. Issues that are likely to be discussed include the content of the indicator set, the accuracy and timeliness of data (currently, MDG data are at least 2–4 years out of date, if they exist at all), the continuing relevance and utility of the indicators in a changing world, funding gaps, and the need for greater MDG localization. This meeting presents a unique opportunity for African leaders to communicate their concerns and priorities and push for the fulfillment of the many unmet pledges and commitments. It is an encouraging sign that African governments are formulating a common position on the MDG review (similar to the African Common Position on the Review of the Millennium Declaration and the Millennium Development Goals they adopted in May 2006).

Opportunity 3: 16th Conference of the Parties to the UN Convention on Climate Change (COP 16)

Given that it appears increasingly unlikely that COP 16 will yield a binding international agreement on climate change, African leaders should at the very least ensure that the key elements included in the Copenhagen Accord and negotiation texts on financing, REDD-plus, technology-transfer mechanism are made operational. Building on the initial meeting of the UN Panel on Climate Change Financing held in London in March 2010, as well as the preparatory working group meetings held in Bonn in April, African leaders have a good opportunity at the summit in Cancun, Mexico, in December 2010, to push for further clarifications and progress towards a binding agreement.

CLIMATE-PROOF DEVELOPMENT AND ECONOMIC GROWTH

Whether intended or not, the discussion around the MDGs has largely assumed that Africa and other developing regions would experience stable climatic conditions. As the negative impact of climate change becomes increasingly obvious, so does the need to view socio-economic development and adaptation to climate change as inextricably linked. Clearly, meeting the MDGs will become harder in a more hostile climate. At the same time, efforts to adapt to the inevitable effects of climate change must be designed and implemented in conjunction with development programmes. As a result, African leaders need to integrate climate change responses into growth and development strategies and identify required capacities, paying special attention to agriculture and animal husbandry, water and other infrastructure, disease management and health systems, public service provision and natural-resource management.

Climate change will make it harder to produce enough food for Africa's growing population, and will alter the timing, availability and quality of water resources. Without countervailing investments in drought-resistant crops, new farming methods, improved water, forest and fishery management, and information systems like the Weather Information for All, food insecurity may increase significantly across the continent. The International Food Policy Research Institute (IFPRI) estimates that $7 billion will be needed annually by developing countries to protect agriculture from the impact of climate change.[80]

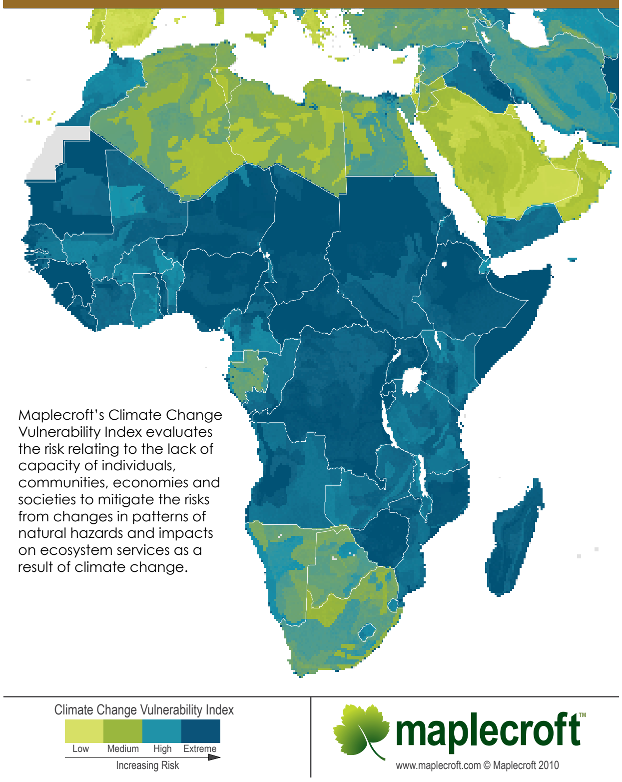
Increased investments are also needed to improve water-resource management, including irrigation systems, and to avert threats to water supply for household, agricultural and industrial use. Likewise, investments in energy infrastructure must consider the possible consequences of changes in precipitation patterns on hydroelectric power potential. As a top priority, urban water, power and transport infrastructure needs to be made climate resistant as rising temperatures and changing precipitation patterns increase wear and tear.

To avert a possible expansion of infectious diseases, health systems need to be strengthened and investments made in infectious-disease control through: vaccinations; residual indoor spraying, insecticide-treated bed nets and other means of vector control; and expanded access to efficacious treatment.

Key ecosystems such as wetlands, drylands, mangroves, forests and lakes will be put under greater stress by climate change. Only careful management can avoid the worst consequences and ensure the long-term sustenance of critical ecosystem services that are central to economic development and human well-being.

All this serves to show that effective adaptation is largely about scaling up and replicating already proven development interventions rather than fundamentally different approaches. While new mechanisms may be needed to mobilise additional funds, existing mechanisms can be used to programme the funds.

Climate Change Vulnerability Index



Effective adaptation is largely about scaling up and replicating already proven development interventions

ACCELERATE REGIONAL INTEGRATION

The last decade has seen a deepening of regional cooperation in a range of functional fields, including trade and customs, peace and security, energy and infrastructure. We believe that an acceleration of this positive trend is essential if Africa is to overcome the developmental challenges posed by its political and geographic fragmentation, develop intra-African trade, reap the benefits of economies of scale and enhance its competitiveness in the global economy.

A critical driver of regional integration is the development of reliable regional infrastructure. With the AU/NEPAD African Action Plan, the AfDB infrastructure lending facility, and the Infrastructure Consortium for Africa (ICA), several sensible plans and instruments are in place to improve regional power pools, transport networks, backbone communication infrastructure, and trans-boundary water management.

THE AU/NEPAD AFRICA ACTION PLAN 2010–2015

Significant progress has been made in addressing the constraints that have hindered the full implementation of NEPAD. In 2009, NEPAD was finally integrated into the AU structures, leading to a more harmonious relationship and the creation of synergies between the two organizations. The identification of priority programmes and projects related to the promotion of sub-regional and regional integration in the AU/NEPAD Action Plan provides a firm basis on which to anchor integration efforts across the continent.

African leaders now need to act on these plans and use the means at hand – including the growing interest in infrastructure funding from newer development partners like China, India and South Korea – to enable greater regional cooperation, low-carbon growth and, ultimately, political integration. The recent experience of the East African Community (EAC) is testimony to the feasibility of rapid progress, even in the face of great odds, if political will is matched with sound regional strategies and adequate domestic and external resources.

HARNESS THE POTENTIAL OF INFORMATION TECHNOLOGY

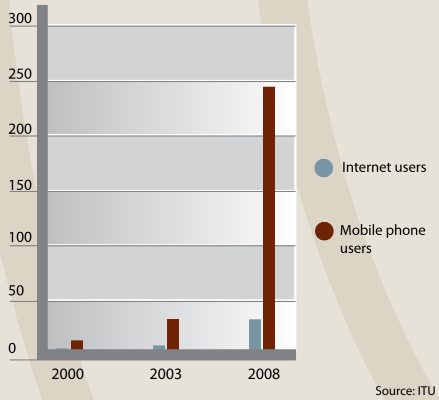
Whether by connecting people with each other, linking rural areas to the world, spreading knowledge, improving healthcare delivery or providing a basis for small businesses through mobile banking, the spread of information and communication technologies (ICTs) has changed how Africa's people interact and its economies function. Farmers are increasingly using cell-phone-based trading platforms for their agricultural products and, in markets where transferring cash is expensive and exchange rates are volatile, prepaid minutes have become a form of currency. With the spread of new technologies bound to accelerate, African leaders need to apply the developmental lessons learned by India, China, and South Korea who once were, and to a certain extent still are, in a similar position with respect to the spread, regulation, and targeted application of new technologies.

The 14th African Union Summit, which took place in January 2010 on the theme of "Information and Communication Technologies in Africa", underscored awareness of the benefits of ICTs and the policies required to realize them. This must now be translated into expanded access and more affordable services for as many people as possible. Leaders can build on the policy reforms that enabled the enormous success of mobile telephony across the continent and harness the power of ICT to improve the efficiency and reach of government services. The e-Customs System in Ghana, for example, increased customs revenues by 49 per cent in its first 18 months of operation, and reduced clearance times from three weeks to two days.[81]

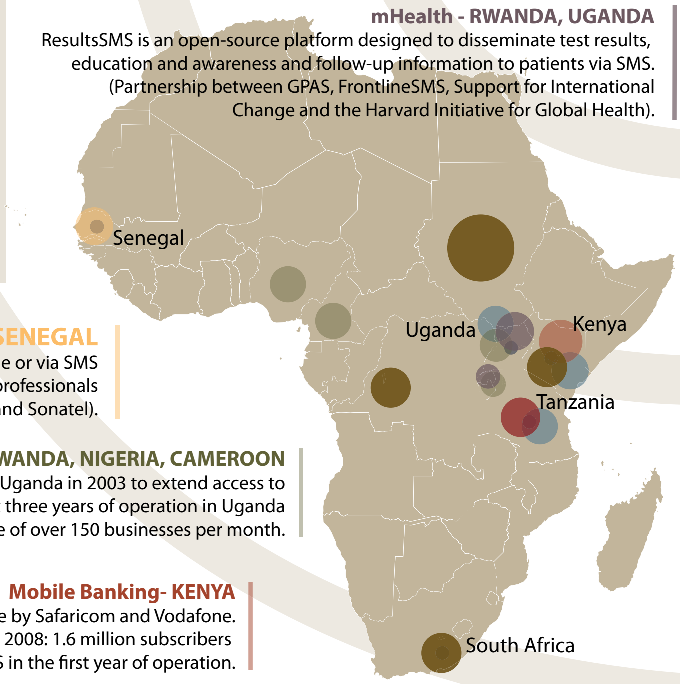
Acceleration of integration is essential if Africa is to enhance its competitiveness in the global economy

Status and Development of ICT

Internet and mobile phone users in Sub-Saharan Africa (in millions)



Mobile phone applications and development potential for Africa



mHealth - RWANDA, UGANDA
ResultsSMS is an open-source platform designed to disseminate test results, education and awareness and follow-up information to patients via SMS. (Partnership between GPAS, FrontlineSMS, Support for International Change and the Harvard Initiative for Global Health).

Manobi - SENEGAL
Platform providing market data and e-business services online or via SMS to the rural sector and agribusiness professionals (joint venture between Manobi France and Sonatel).

Village phones - UGANDA, RWANDA, NIGERIA, CAMEROON
Initiative launched by Grameen Foundation and MTN Uganda in 2003 to extend access to telephone to rural areas and promote entrepreneurship. In the first three years of operation in Uganda over 6.700 new businesses were set up representating a growth rate of over 150 businesses per month.

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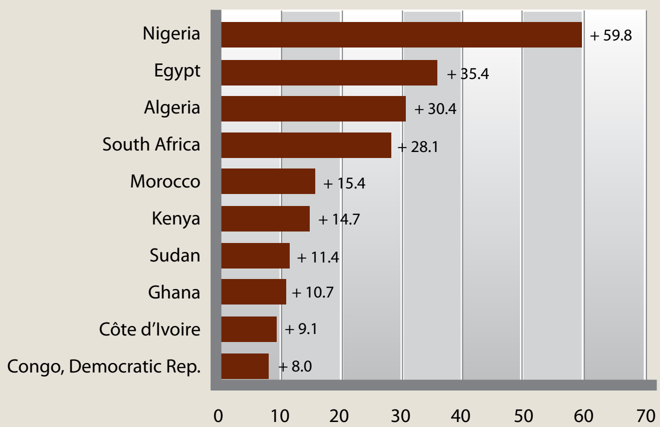
Mobile Banking- KENYA
M-PESA mobile phone money transfer scheme by Safaricom and Vodafone. Cost: $1 for service - Until 2008: 1.6 million subscribers $148 million transferred via SMS in the first year of operation.

Agricultural Marketing Systems Development Programme (AMSDP) - TANZANIA
Online server providing latest cash crop prices via SMS for farmers (In partnership with Vodacom).

Weather Info for All (WIFA) - KENYA, TANZANIA, UGANDA
Joint initiative by Global Humanitarian Forum, Ericsson, the World Meteorological Organization, Zain and Columbia University's Earth Institute to deploy automatic weather stations in mobile network sites across Africa to provide weather information to users and communities including remote farmers and fishermen.

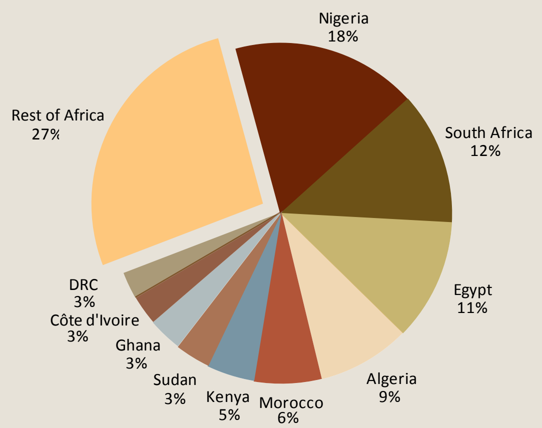
Ushahidi (crowdsourcing crisis information) - KENYA, DRC, SOUTH AFRICA, SUDAN
Online and SMS platform to report outbreaks of violence or epidemic, and monitor elections.

The ten African countries with the highest net additions of mobile phone users between 2003 and 2008 (in millions)



Source: ITU, World Telecommunication/ICT Indicators Database.

Distribution of mobile cellular subscriptions in Africa, 2008



Source: ITU

ANTICIPATE DEMOGRAPHIC DYNAMICS

Africa's population has reached the one billion mark, with more than 43 per cent being under the age of 15, and 62 per cent under the age of 25. Demographic trends compound the policy challenges that African leaders face, in particular those relating to urbanization, youth unemployment, food security, and the provision of public services such as education and health.[83] In Sub-Saharan Africa, three in five of the total unemployed are youth and on average 72 per cent of the youth population live with less than $2 a day.[84]

The energy, skills and aspirations of young people are invaluable assets that must not be squandered. Helping young people to realize their full potential by getting work is a precondition for poverty reduction, sustainable development and lasting peace. Young entrepreneurs need to be fostered and encouraged as they represent the continent's drivers of change. The Africa Commission convened by the Prime Minister of Denmark recommends a number of practical steps that can be taken by governments, with the support of ILO and others, to assist young entrepreneurs; these should be implemented.

African leaders need to expand job and education options in the rural areas, encourage and support entrepreneurship, improve the access to and quality of skills formation and adapt their governance systems in such a way as to maximize representativeness and accountability, while minimizing the risk of environmental degradation and civil strife. Just as they need to "climate-proof" their national development and growth plans, leaders also need to consider expected demographic shifts in their long-term strategies and policies.

In Sub-Saharan Africa, three in five of the total unemployed are youth

AFRICAN LEADERS NEED TO...

EMPOWER AFRICA'S WOMEN

While African governments score high in terms of ratifying and developing sensible policies to empower women, they are still not implementing enough of them. Despite the Beijing Platform for Action and subsequent inter-governmental commitments made at international conferences, or ratifications of United Nations and African Union conventions and declarations by member states, there has been insufficient progress across the board, with particularly large gender gaps remaining in access to health services, employment and political participation. As a result, women and children are still the first to pay with their health and their lives for economic contraction, conflict and poverty.

This is not only a human tragedy, but also a major brake on Africa's economic development and the achievement of MDG-based targets, as there is a proven positive correlation between women's empowerment and household incomes, nutrition and education levels, and agricultural productivity.[85]

Fortunately, there appears to be a growing realization of the crucial importance of investing in women's empowerment. African leaders need to enforce existing conventions, laws and policies and link their efforts with effective implementation strategies, including reliable reporting mechanisms.

This year, we underscore our conviction that women's empowerment is central to progress both by highlighting the gender dimension to each of our key findings and recommendations, and by issuing a separate and complementary report on engendering Africa's progress (see www.africaprogresspanel.org).

There is a proven positive correlation between women's empowerment and household incomes, nutrition and education levels, and agricultural productivity

Women in Society, the Economy and Politics

Given the key role of women in the agricultural sector, improving their situation means progress for the sector and for the economy as a whole. Essential measures that need to be taken are: increasing women's access to farming land and fertilizers, credit, and education; increasing women's participation in decision-making; and strengthening women's role within the family. All these measures are crucial to guaranteeing food security as well as gender equality.

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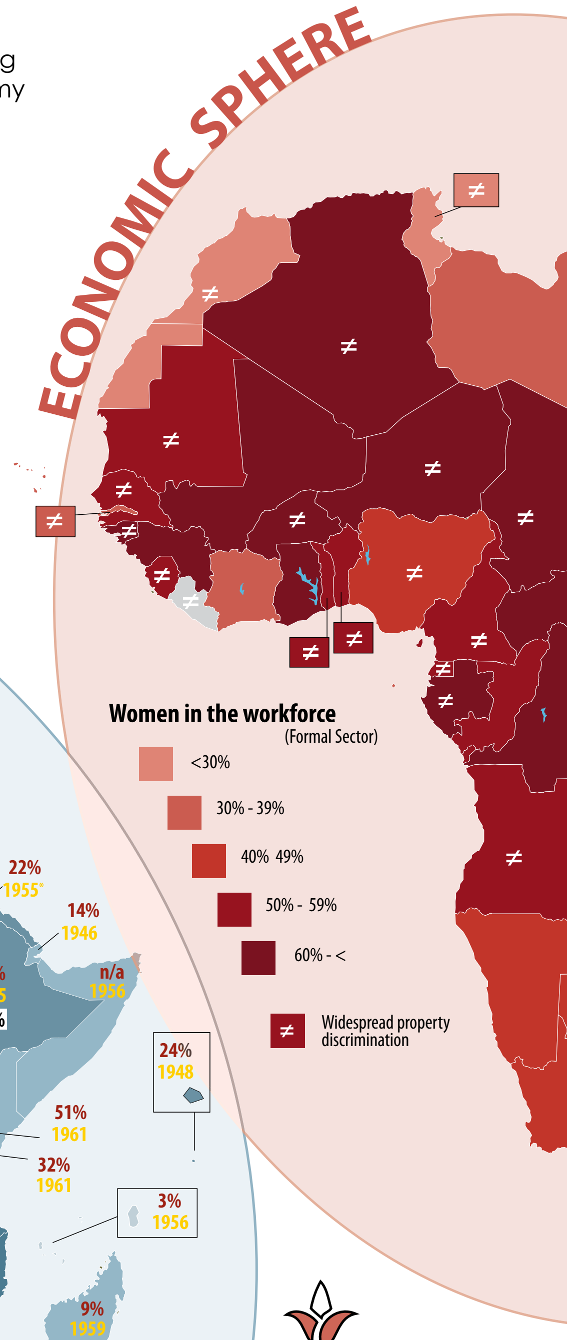

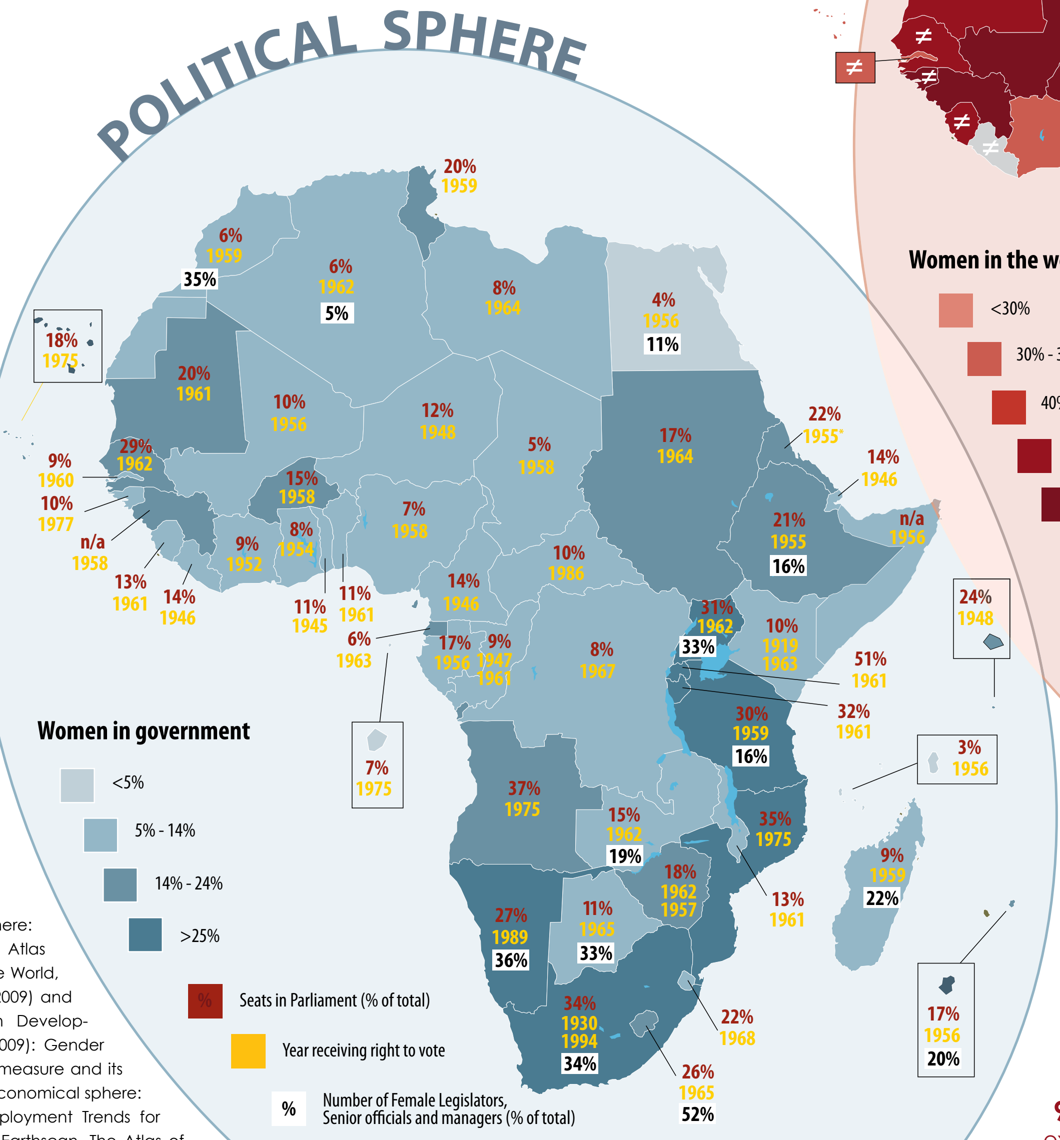

Women lack political influence. They are not represented when policies are formulated, when programmes are developed, when budgets are drawn or when decisions are made about their work and their life.

Women working in agricultural occupations are much less likely than other working women to be paid for the work they do (**56% versus 98%**). This can be explained by the fact that most women who work in an agricultural occupation are assisting their husbands or family.

Data sources: Political sphere: Earthscan, The Atlas of Women in the World, fourth edition (2009) and UNDP, Human Development Report (2009): Gender empowerment measure and its components. Economical sphere: ILO, Global Employment Trends for Women (2009); Earthscan, The Atlas of Women in the World, fourth edition (2009); UNECA, African Women's Report: Measuring gender inequalities in Africa (2009). Social sphere: Earthscan, The Atlas of Women in the World, fourth edition (2009); UNECA, African Women's Report: Measuring gender inequalities in Africa (2009) and ILO, Global Employment Trends for Women (2009).

Widespread property discrimination refers to the discrimination that women face regarding inheriting, owning or controlling property, land and wealth. In most cases this discrimination is supported by civil, customary or religious laws. Women generally own less land and the land they have is often of lower quality than the land owned by men.

SSA is – besides South Asia – the region with the highest share of female employment in the agricultural sector (both formal and informal). An essential reason behind the failure of the agricultural sector and the food crisis have been **gender inequality and lack of empowerment of women**, who, to a large extent dominate this sector. If women receive the same levels of education, experience, access to land and farm inputs as men, it is estimated that women would increase yields of some crops by between **20-25%**.

Non-market economic activities cover non-paid (non-SNA) work, such as domestic care and volunteer activities, including meal preparation, caring for children, adults, the elderly, handicapped or the sick within the household, and volunteer work for the community or other households.

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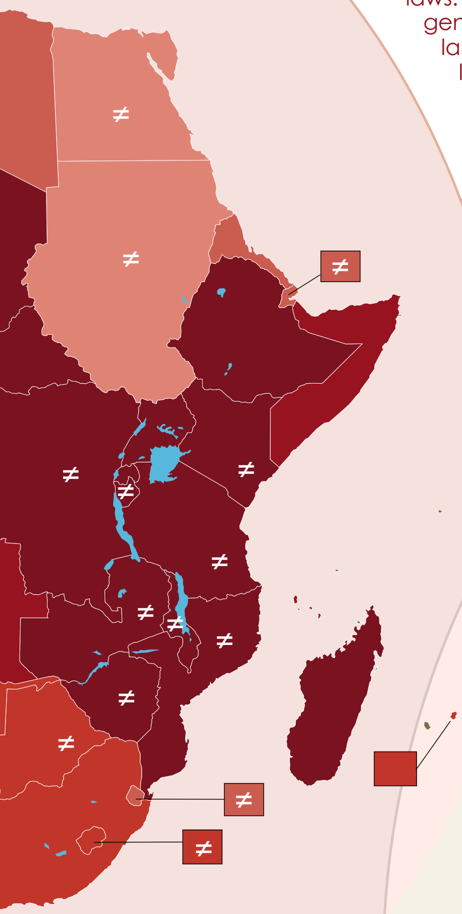
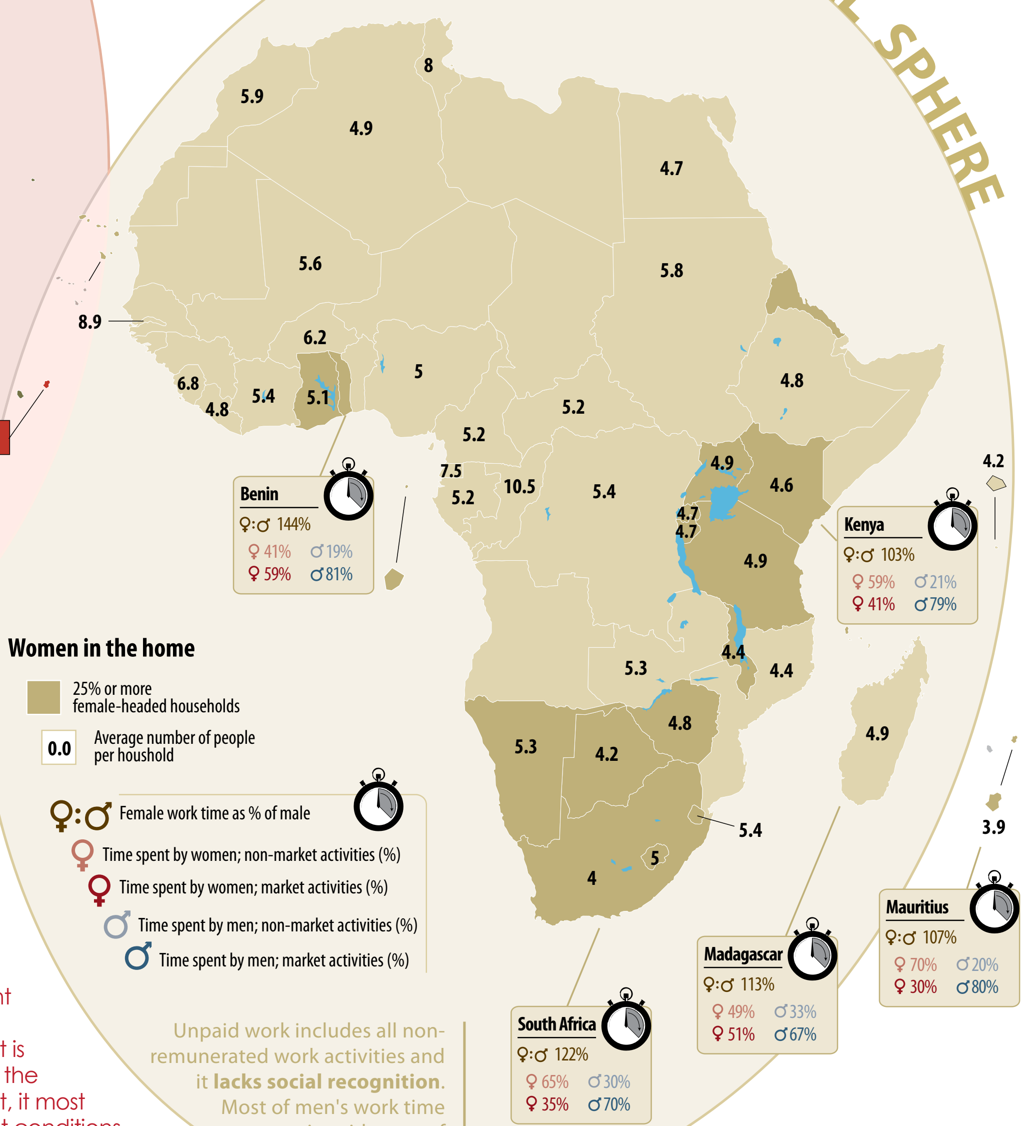
SOCIAL SPHERE



Being part of the labour force already provides women with **additional economic power**.



Informal sector work includes petty trade, food processing and domestic work. It is paid but unstructured and unregulated. Informal employment comprises **48%** of non-agricultural employment in **North Africa** and **72%** in **Sub-Saharan Africa**. Although it is hard to generalize concerning the quality of informal employment, it most often means poor employment conditions and is associated with increasing poverty and insecurity.

Unpaid work includes all non-remunerated work activities and it **lacks social recognition**. Most of men's work time is paid, most of women's is not.

AFRICA'S PARTNERS NEED TO...

PROVIDE A LEVEL PLAYING FIELD

Africa's development and the welfare of its people depend above all upon the political commitment and capacity of its leaders, but they need, and deserve, an international environment that is fair and supportive of their efforts. Currently, it is neither.

The international system is not fair because Africa does not have an adequate say in it. Even though it is home to almost a billion people and is profoundly affected by wider global dynamics like the economic downturn, trade and climate change, the continent continues to be starkly under-represented in virtually all international fora and processes that deal with such challenges, including the World Bank, the UN Security Council and the Financial Stability Board (FSB). While the shift from the G8 to the G20 does signal a growing appreciation of the need to make international governance mechanisms more inclusive, the benefits for Africa have so far been marginal at best.

The international system is not supportive because even though Africa's special needs and concerns are frequently invoked at international meetings and in summit declarations, they are simply not acted upon. Be it in the Doha Trade Round or the ongoing climate-change negotiations, developed countries are jealously guarding their interests with only marginal regard for the special needs and priorities of the less developed. Bloated subsidy regimes and unfair trade rules continue to distort the playing field, leaving African countries heavily disadvantaged. It is also true that African leaders have so far taken insufficient advantage of existing mechanisms to level the playing field, such as the United States' African Growth and Opportunity Act (AGOA).[86]

While there is certainly some scope for African leaders to be even more assertive about the need for a new multilateralism which anchors the continent more firmly in international decision-making processes and institutions, the main responsibility to adapt and improve the international system rests with those who control it. These include increasingly powerful countries like Brazil, China and India.

Even though the rapid rise of these countries provides Africa with powerful allies on the global stage, it also amplifies some of Africa's existing difficulties in the global system. It is important, therefore, that emerging economies recognize the competitive challenge they themselves pose to the continent, including through policies that inhibit the export of African products into their markets.

AFRICA'S PARTNERS NEED TO...

INCREASE POLICY COHERENCE FOR DEVELOPMENT

Policy coherence has become a buzzword over the last decade. Most states and inter-governmental organizations have launched initiatives to improve the coherence of their policies and activities. Despite the resultant flurry of activities, a simple but important distinction between two types of policy coherence has received insufficient attention. What most countries, and indeed international organizations, are trying to optimize is their output coherence; that is, they are trying to reduce the internal contradictions of their various policies in order to maximize the chances of achieving their declared strategic aims at minimal cost.

What is much more interesting from a development perspective is impact coherence; that is, the extent to which the overall policy mix of developed countries harms or benefits developing countries. Western trade policies, for example, often directly contradict the stated aim of Western development aid, as do migration, consumer-protection, and other policies. Developing countries rightly chastise this incoherence as "giving with one hand and taking with the other". To make matters even worse, several developed countries actually take more than they give, far offsetting any positive effect their aid and other development support may have.

Africa needs an international environment that is fair and supportive of its development objectives and efforts. Currently, it is neither

We call on Africa's partners, particularly those that rank low on the Commitment to Development Index, to recognize the overall impact on the continent of their domestic and international policy mix and seek to minimize their negative effects. Several actors, including the European Union, have already formulated strategies to increase their Policy Coherence for Development (PCD), but need to find the political will to implement them.

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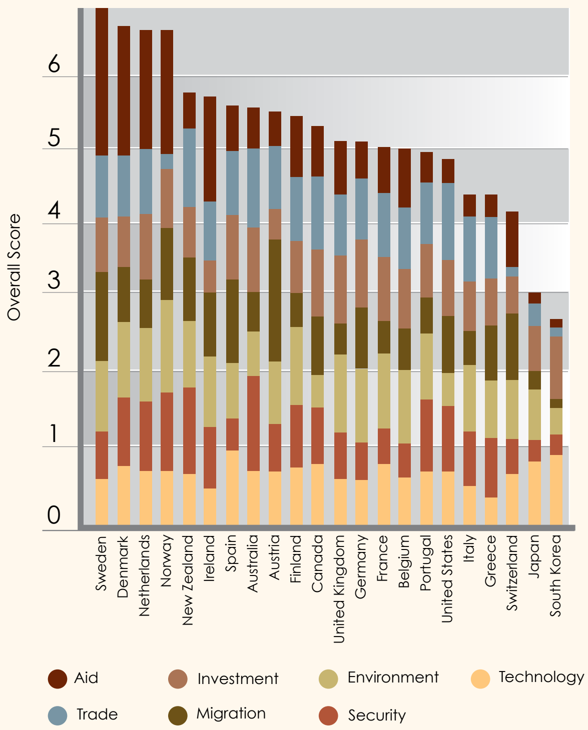
THE COMMITMENT TO DEVELOPMENT INDEX

The Commitment to Development Index (CDI) rates the 22 member countries of the OECD Development Assistance Committee on the impact on developing countries of their policies in seven functional areas – aid, trade, investment, migration, environment, security and technology. Significantly, none of the G8 members made it into the top ten in the 2009 rankings.



Source: Center for Global Development, Commitment to Development Index (2009)

AFRICA'S PARTNERS NEED TO...

FULFIL PROMISES ON RESOURCES AND ASSISTANCE

Total aid invested in Sub-Saharan Africa over the last 50 years is in the area of $900 billion in today's prices.[87] For this, Africa's development partners deserve gratitude and recognition. However, this amount is less than 70 per cent of what the world spends on arms and soldiers – per year.[88] With this in mind, we call on Africa's partners to recommit to the consensus on the continent's development and fulfil the many promises on financial support and assistance they have made over the last decade. With this in mind, we call on Africa's partners to recommit to the increasingly brittle consensus on the continent's development and fulfil the many promises on financial support and assistance they have made over the last decade. We recognize that this requires difficult decisions and compromises, particularly in times of global economic uncertainties and increased domestic pressures, but are convinced that helping to meet Africa's financing needs will also yield substantial benefits for them and indeed the rest of the world. In this respect, it is crucial that Africa's partners communicate these benefits more clearly to their people – many of whom have never even heard of the MDGs.[89]

AFRICA'S FINANCING NEEDS

In 2008, the MDG Africa Steering Group estimated that Africa requires some $112.7 billion in annual public expenditure to meet the MDGs, and $122.5 billion if disaster-response and coastal-protection measures are included.[90] Given Africa's limited capacity to mobilize domestic resources, approximately $82.1 billion would need to be covered by international partners. If one adds the amount needed to achieve the MDGs in the presence of anticipated climate change, the total annual financing need for climate-resilient development comes to around $100 billion.[91]

Much of this need could actually be met if partners were to fulfil the pledges they made over the last couple of years, and realize the financing ambitions outlined in the Copenhagen Accord – that is, $30 billion for support to developing countries for the period 2010–2012 and $100 billion a year by 2020. Some of the mechanisms to collect, administer and disburse these funds are already in place, such as the African Development Bank. Others are in the early stages of development, such as the IMF's Green Fund or the Copenhagen Climate Fund.

THE FUTURE OF DEVELOPMENT AID

Since 2002, development finance in Africa has more than tripled, with domestic revenues dwarfing private flows, remittances, ODA and philanthropic giving. However, even though ODA is decreasing in relative importance in volume terms, it is increasingly important when it comes to leveraging other flows. Well used, it plays a vital role in strengthening capacities to raise revenues, reduce illicit flows, attract remittances and private investment, achieve specific development results and create opportunities for the poor, including by strengthening accountability systems.

Aid is certainly not the only answer to Africa's problems, but it can save lives and strengthen systems. As African economies grow and integrate into the global economy, dependency on aid will gradually decrease. In the meantime, it is important to use the available resources in the most efficient and effective ways possible. The last couple of years have seen increased efforts to improve aid effectiveness by overcoming donor fragmentation, promoting collaboration and complementarity, and aligning financing more clearly with country systems, strategies and policies. They have also seen new approaches to aid delivery and innovative concepts to maximize aid impact. Some argue that these innovations do not go far enough, that a radical overhaul of the "ODA industry" is required, but how this could be brought about is not all clear. In the meantime, Africa's partners need to take advantage of incremental improvements and innovations, and continue to upgrade their delivery and coordination practices in accordance with the Paris Declaration and Accra Agenda. Together with African leaders, they should also make use of and build on synergies with and the increasingly apparent developmental potential of the private sector.

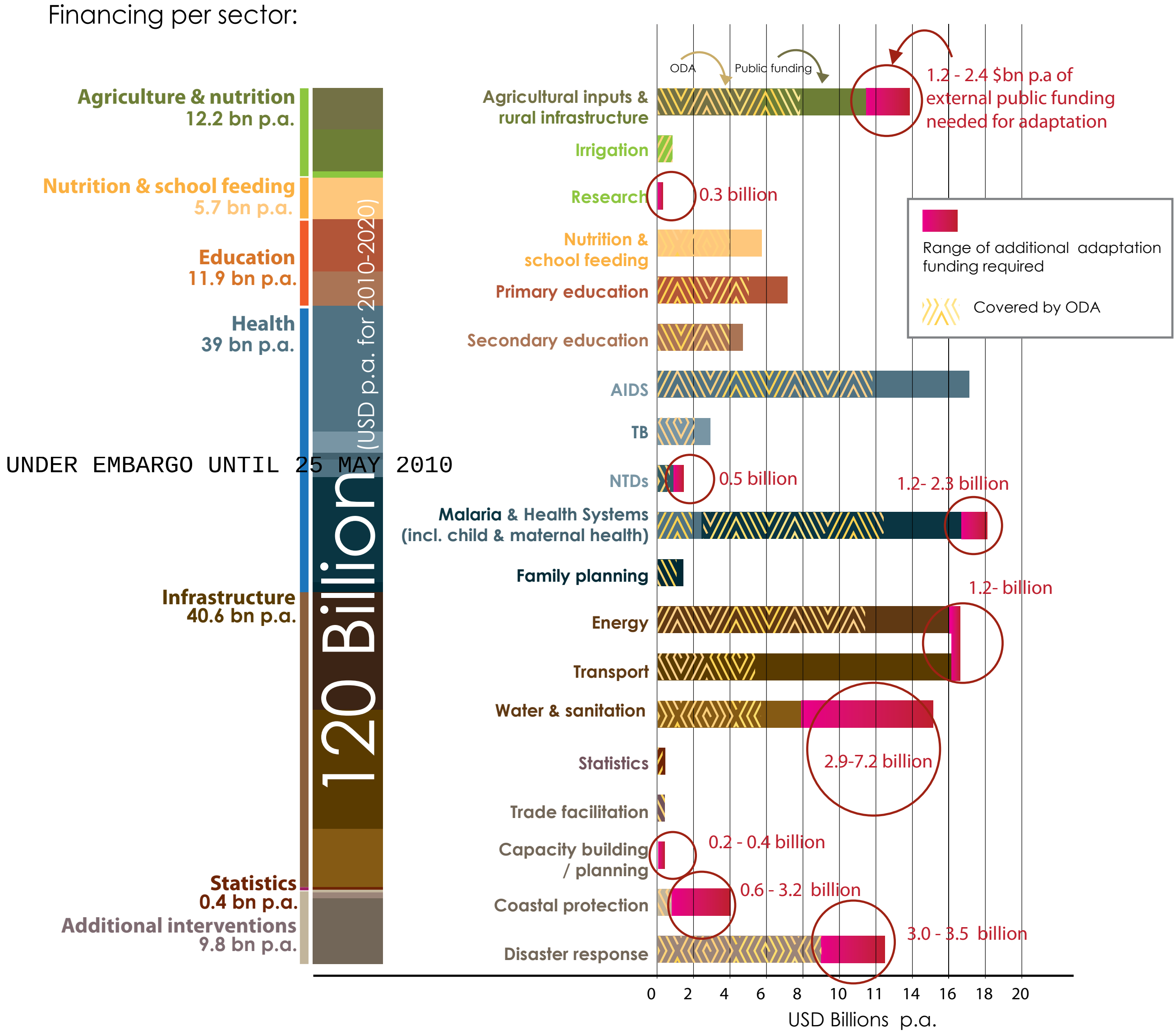
Africa's development partners deserve gratitude and recognition... We call on Africa's partners to fulfil the many promises they have made over the last decade

Financing Climate Resilient Development

Total financing needs for climate-resistant development in Africa, i.e. achieving the MDGs in the presence of anticipated climate change, amounts to some **$120 billion per year.**

	Average external financing needs (2010-2020, p.a.)	Type of finance	Source of finance	Status of financing
Development (MDGs) & disaster response	$82.1 billion	Grants & concessional loans for infrastructure	External public finance	2009 ODA: $38.2 billion
Adaptation	$10.8-20.5 billion	Grants	External public finance	~$100 million for adaptation
Mitigation	1-2 percent of GDP ($13-26 billion)	Carbon finance, loans	Largely carbon markets	~$50-80m through CDM

Financing per sector:



"Additional resources" for climate change mitigation are in addition to the $82.1 billion in annual ODA that have been committed for achieving the MDGs, but of which only half is provided. In total, the financing gap for climate-resilient development in Africa is in the order of $50-70 billion in external public finance that must be provided in the form of ODA and additional climate finance.

Data Source: Fankhauser and Schmidt-Traub (2010) Finance for climate-resilient development in Africa

At the same time, African governments need to improve national statistical systems so that international support can be better targeted. With support from development partners, African countries need to increase public expenditure for national statistical systems to effectively monitor progress towards the MDGs, inform strategies for national development and poverty reduction, and implement the many statistical capacity-building programmes already in place, including those contained in the African Charter on Statistics adopted by the AU Assembly in February 2009.[92]

CASH ON DELIVERY AID

This concept links aid directly to outcomes as a way to promote accountability and strengthen local institutions. Cash on Delivery Aid is a contract for funders and recipients to agree on a mutually desired outcome and a fixed payment for each unit of confirmed progress. Although the concept is conceived as a substantial and fundamental change in the way foreign aid programmes are conducted, it is not intended to supplant all other forms of foreign assistance, but – through its mechanisms for measuring progress, providing incentives and clarifying responsibilities – help funders and recipients make much more efficient use of existing resources across a spectrum of aid programmes.

MODELING BUSINESS ENGAGEMENT IN DEVELOPMENT

The last few years have seen increased attention focused on the practical ways in which the private sector can add social and environmental value while pursuing core business goals, and in the process contribute to job creation, functioning markets and infrastructure improvements. A number of models are emerging, ranging from "social business" models, such as those associated with the Gramin Foundation; "growth corridors" which crowd in investors to areas of high agricultural and trade potential (for example the Southern Agricultural Growth Corridor of Tanzania or the Beira Corridor); review of sourcing and labour practices to benefit local economies; Millennium Villages; and others. In addition to trade and industry associations, a growing number of business organisations in Africa and beyond (for example the Business Call to Action, the Corporate Council on Africa, the International Business Leaders' Forum, Frontier 100, the NEPAD Business Group, and the World Business Council for Sustainable Development) are encouraging sharing of best practice and networking among business leaders.

For further information, see our recent Policy Brief "Doing Good Business in Africa" at www.africaprogresspanel.org

CONCLUSION

UNDER EMBARGO UNTIL 25 MAY 2010

Attempting to capture and assess Africa's progress in one slim report is an ambitious undertaking. Generalizations need to be treated with great caution. The variety of the continent's economic and political circumstances defies blanket judgements or prescriptions. Yet, several themes emerge from a review of Africa's progress over the last five years, and from anticipation of what the future holds.

Africa's strategic importance is growing as the world recognizes the economic value of its human and natural resources. The threats that Africa faces are also more apparent, including its vulnerability to climate change, epidemics, organised crime, the volatility of fuel and food prices, and financial and economic shocks.

Our concern is whether the political leadership, accountability systems and management capacities are being put in place to manage both emerging risks and opportunities for the benefit of all Africa's people. Will increased revenues from the exploitation of natural resources be channelled to socially beneficial ends? Or will they be wasted, used for unproductive ends or filtered off into private bank accounts?

Resource-poor and fragile states face additional hurdles. In these areas, meeting even the most basic needs, let alone building technical and management capacity or providing social safety nets, is much harder. The deprivations endured by millions of people, particularly women and children, living in conflict zones and ungoverned spaces are unacceptable and disastrous. More concerted action by Africa's leaders, supported by their international partners, is needed to break the cycles of instability and poverty that plague fragile states, and corrode progress for the whole continent.

We are frustrated by the lack of data and African research and policy capacity that is so essential for a full understanding of trends and appropriate policy responses. However, we believe that the social impact of the global economic crisis on jobs, poverty levels and MDG achievement has been profound and is contributing to instability and conflict in areas that were already under stress. At the same time, we are relieved that the worst predictions about Africa's economies and financial systems have not been realised, in large part thanks to timely action by its Ministers of Finance, Central Bank Governors and the international financial institutions.

The crisis resulted in greater political and economic introspection. Rescue packages have been crafted by, and primarily for, the "haves" rather than the "have-nots". Throughout this report, we argue that failure to put Africa's development and governance needs at the heart of the global agenda will have literally disastrous consequences for the world's security and prosperity.

Africa's future is in its own hands, but its capacity and progress depend on supportive global policies and agreements – notably on issues such as climate change, technology transfer, trade and financial flows. African governments need to strengthen their access to legal and financial expertise in order to get the best deals, whether with the private sector or in international discussions. We urge African leaders to be more proactive in shaping common positions and in insisting that these are addressed in international fora, including the G20. We believe that ODA remains essential particularly in resource-poor countries, that there is scope for being more strategic in its use. African leaders from all walks of life can and must be more vocal in supporting aid advocates in richer countries, both industrialised and emerging.

Success in getting international partners to fulfil their obligations, whether in terms of codes of practice or other policies, will increase if Africa is seen to uphold its side of the development bargain. One of the most obvious steps is to empower women legally, economically and politically; the potential benefits both for them and for economic growth are enormous. Another key step is to promote greater political and economic cooperation, if not integration, including in infrastructure and communication, and the reduction of both hard and soft barriers to trade. Incentivizing entrepreneurs and fostering public–private partnerships will allow Africa to capture the transformational benefits of information technology.

Africa's strategic importance is growing as the world recognizes the economic value of its human and natural resources

The moral and political case for insisting that rich countries provide adequate and additional financial and technical resources for climate change will also be greatly reinforced if African countries take the initiative to climate-proof their growth and development plans, and develop bankable projects in infrastructure, energy and employment.

In conclusion, the last five years have highlighted both Africa's potential and its vulnerability. The central challenge for Africa's leaders is to inspire processes and build practical capacities, both nationally and regionally, to ensure that assets are translated into social benefits and that their people are supported to withstand shocks and stresses and are able to access opportunities that can transform their lives, countries, and continent.

The central challenge is to ensure that assets are translated into social benefits

LIST OF ACRONYMS

AfDB - African Development Bank
AFMI - African Financial Market Initiative
AGOA - African Growth and Opportunity Act
AGRA - Alliance for a Green Revolution in Africa
AMCEN - African Ministerial Conference on the Environment
AMCOW - African Ministers' Council on Water
AMFm - Affordable Medicines Facility – Malaria
APRM - African Peer Review Mechanism
APSA - African Peace and Security Architecture
ASF - African Standby Force
AU - African Union
AWF - African Water Facility
CAADP - Comprehensive African Agriculture Development Programme
CAHOSCC - Conference of African Heads of State and Government on Climate Change
CARMMA - Campaign on Accelerated Reduction of Maternal Mortality in Africa
CDI - Commitment to Development Index
CDM - Clean Development Mechanism
CEWS - Continental Early Warning System
CGIAR - Consultative Group on International Agricultural Research
COMESA - Common Market for Eastern and Southern Africa
DAC - Development Assistance Committee
DRR - Disaster-Risk Reduction
EAC - East African Community
ECCAS - Economic Community of Central African States
ECOWAS - Economic Community of West African States
EDF - European Development Fund
EEAS - European External Action Service
EFA - Education for All
EU - European Union
FAAP - Framework for African Agricultural Productivity
FARA - Forum for Agricultural Research in Africa
FOCAC - Forum on China–Africa Cooperation
FSB - Financial Stability Board
FTI - Fast Track Initiative
GAVI - Global Alliance for Vaccination and Immunization
GDP - Gross Domestic Product
GNI - Gross National Income
HDI - Human Development Index
HHA - Harmonization for Health in Africa
HIPC - Highly Indebted Poor Countries (Initiative/ Programme)
IATI - International Aid Transparency Initiative
ICA - Infrastructure Consortium for Africa
ICC - International Criminal Court
ICT - Information and Communication Technology
IFAD - International Fund for Agricultural Development
IFFIm - International Finance Facility for Immunization
IFIs - International Financial Institutions
IFPRI - International Food Policy Research Institute
IGAD - Intergovernmental Authority on Development
IHP - International Health Partnership
ILO - International Labour Office
IMF - International Monetary Fund
IPCC - Intergovernmental Panel on Climate Change
LDCs - Least Developed Countries
MDG - Millennium Development Goal
MDRI - Multilateral Debt Relief Initiative
NEPAD - New Partnership for Africa's Development
OAU - Organization of African Unity
ODA - Official Development Assistance
OECD - Organization for Economic Cooperation and Development
PCD - Policy Coherence for Development
PEFA - Public Expenditure and Financial Accountability (Partnership)
PSC - Peace and Security Council
PPP - Public–Private Partnership
REC - Regional Economic Community
REDD - Reducing Emissions from Deforestation and Forest Degradation
SADC - Southern Africa Development Community
SDR - Special Drawing Rights
SMEs - Small and Medium-Sized Enterprises
SWAps - Sector-Wide Approaches (for aid delivery)
UNCTAD - UN Conference on Trade and Development
UNESCO - UN Educational, Scientific, and Cultural Organization
UNFPA - UN Population Fund
UNICEF - UN International Children's Emergency Fund
UNIFEM - UN Development Fund for Women
WEF - World Economic Forum
WTO - World Trade Organization

NOTES

A NOTE TO THE READER

All data used in this report are drawn from official and readily available sources, which are referenced below. Every effort has been made to cite the most recent figures, even though occasionally preference has been given to older but more reliable data. As with every report, the reader should be aware of the inherent limitations of the available data and projections as well as the considerable controversies around the prevailing methods of measuring progress.

Readers are encouraged to quote and reproduce material from this report for educational, non-for-profit purposes providing that they acknowledge the Africa Progress Panel 2010 Annual Report as the source.

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