10 YEARS IN AFRICA

IIAG RESULTS & SPOTLIGHTS

2006

2007

2008

2009

2010

2011

2012

2013

2014

2015

MO IBRAHIM FOUNDATION

The Demographic Landscape

Between 2006 & 2016, Africa's population has increased by 260.6 million, the largest population increase of any continent.

Both rural & urban populations in Africa have been growing since 2006.

In 2015 the youth population (aged 15-34) in Africa was more than double that of Europe, 401 million compared to 188 million.

Africa hosted only 3% of the world's middle class population in 2015.

Rule of Law

Rule of Law has registered the 2nd highest IIAG sub-category deterioration since 2006.

25 of the 31 attempted coups d'état in Africa since 2006 failed.

Accountability

Between 2000 & 2008, Africa was losing in excess of $50 billion annually due to Illicit Financial Flows.

Personal Safety

Personal Safety has registered the largest IIAG sub-category deterioration since 2006.

National Security

From 2006 to 2014, the number of 'Persons of Concern' on the African continent almost doubled from around 9.7 million to approximately 17.8 million.

In 2013, the estimated yearly value of cocaine transiting through West Africa alone was $1.25 billion.

Participation

Only 18 of the 53 Heads of State in power in 2006 are still there in 2016.

Of the 35 Heads of State that have left power, 8 died in office & 10 stepped down as the result of a coup d'état, arrest or uprising.

Since 2006, there have been a total of 97 elections on the African continent: 69 presidential, 28 general.

Rights

According to CIVICUS, in 2014 significant violations of civic space took place in 37 African countries.

Contents

NOTE: The Mo Ibrahim Foundation celebrates its 10th year in 2016. This document provides an overview of results in the Ibrahim Index of African Governance (IIAG) and presents facts & figures relating to the topics covered by the framework of the IIAG since 2006, the birth year of the Foundation. Data presented in the document aims to cover events and information between 2006 and 2016 however because the availability of data for each topic varies, this document uses the latest available data. Some data go beyond our stated time-period when this is appropriate or is needed for context or comparisons.

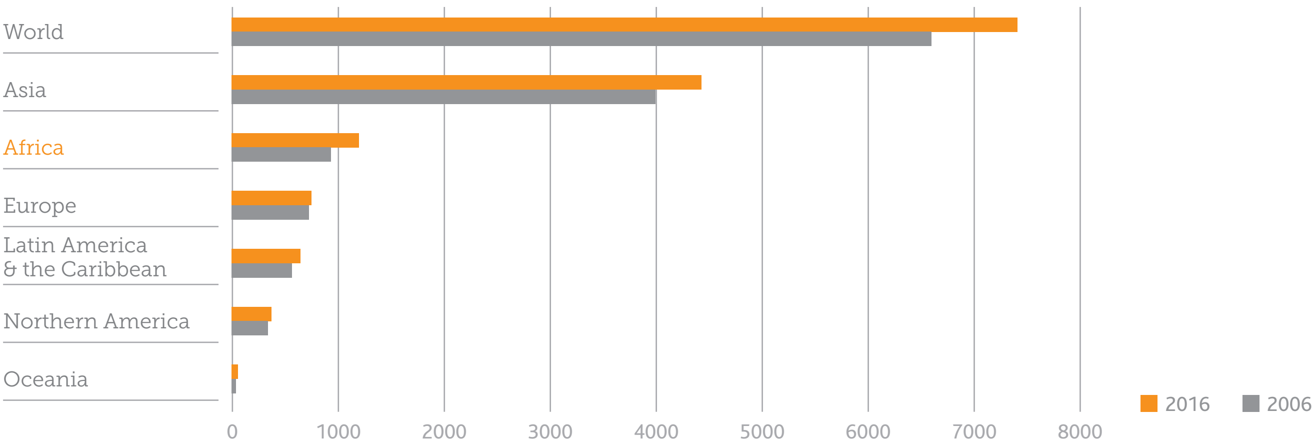
The Demographic Landscape

POPULATION GROWTH

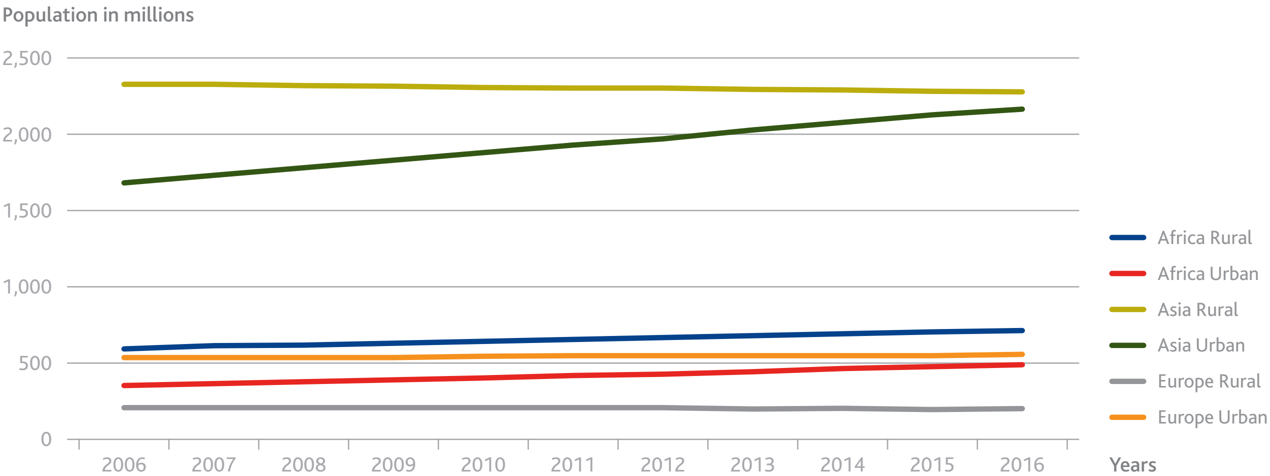
- Since 2006, Africa's population has increased by 28% from 934 million to 1.2 billion, the largest population increase in any major region over that time period.

Population Increase: 2006-2016		
Major Region	Percent (%)	Volume (millions)
Africa	28	260.6
Oceania	17	5.7
World	12	811.7
Latin America & the Caribbean	12	67.2
Asia	11	9.0
Northern America	9	30.4
Europe	1	9.0

Total population for major regions: 2006 and 2016 (millions)



Rural and urban population trend for major regions: 2006-2016



- Since 2006, both rural and urban populations in Africa have been growing. This is a unique pattern in this time-period. These populations in Europe show limited or no growth and in Asia show diverging trends, with urban growing and rural shrinking.

UNDESA, 2014

YOUTH

- Since 2005 Africa has had the highest percentage of people under the age of 14 and under the age of 34 (0-34).[1]
- In 2015 the youth population (aged 15-34) in Africa was more than double that of Europe; 401 million compared to 188 million.

Share of youth population (% of total population)			Total youth population (millions)	
	2005	2015	2005	2015
Africa	34	34	314	401
Asia	35	33	1,375	1,448
Europe	28	25	206	188
Latin America & the Caribbean	35	33	196	211
Northern America	28	27	92	98

Shaded= highest & lowest

- Africa's proportion of youth (aged 15-34) living in urban areas is the highest in the world.

UNDESA, 2014

AFRICA'S MIDDLE CLASS

Diverse definitions

- Calculations of the size of the African middle class use income or consumption-related criteria, and definitions vary.
- *World Bank:* "households who face a low probability of falling into poverty".
- *AfDB:* "those with a daily consumption of $2-$20 (in 2005 purchasing power parity US dollars)".
- *Standard Bank:* "those with a consumption of more than $15 per day ($5,500 per year)".
  - According to Standard Bank, almost 6 million middle class households were added to only 11 African countries between 2000 and 2014: Angola, Ethiopia, Ghana, Kenya, Mozambique, Nigeria, South Sudan, Sudan, Tanzania, Uganda and Zambia.
  - This number is expected to triple to 14 million households between 2014 and 2030.
- *Pew Research Center:* $10-$20 per day.
  - This means only 6% of Africans qualify as middle class.
- *Credit Suisse:* measures middle class membership based on assets and wealth accumulation.
  - It estimates Africa's middle class may be 17 times smaller than previously thought.
- Africa hosted only 3% of the world's middle class population in 2015.
- The middle-class is not spread evenly across Africa.
  - ¼ live in South Africa.
  - Some 922,000 live in Nigeria, 0.5% of the total population.

Definitions of African middle class

EIU: Upper middle=$20-$50 a day

Standard Bank: Living Standards Measure 5 and above=$15 a day/$5,500 per year

AfDB & Pew Research Centre: Upper middle class=$10-$20 a day

AfDB: Lower middle class=$4-$10 a day

AfDB: Floating class=$2-$4 a day

% of middle class population according to different middle class measures

Major Region	Headcount of people living on $ income per day (%)			
	$2-$4	$4-$10	$10-$20	$20-$50
East Asia & Pacific	25	42	19	6
Europe & Central Asia	7	28	36	23
Latin America & the Caribbean	12	35	27	15
South Asia	49	25	3	1
Sub-Saharan Africa	32	18	3	1

AfDB, 2011; Maritz, J. 2014; Pew Research Center 2015; Rosen, A. 2015; World Bank 2013; World Bank, 2015

[1] URPAS Data available from 1980 to 2015, for every 5 year period.

Safety & Rule of Law

RULE OF LAW

IIAG RESULTS SINCE 2006

Since 2006, the African average for *Rule of Law* has decreased by -2.4 score points from 53.2 to 50.8. This is 1 of 6 (of 14) sub-category deteriorations over this time-period. Of the 6 deteriorated sub-categories, *Rule of Law* is the 2nd largest deterioration after *Personal Safety*. 29 countries have deteriorated over this period (South Sudan included, showing deterioration since 2011), and 25 improved (Sudan included, showing improvement since 2011).

MIF, 2015

LARGEST IMPROVEMENT
Sierra Leone: +20.5. From 34.5 to 55.0.

LARGEST DETERIORATION
Eritrea: -21.9. From 30.1 to 8.2.

-2.4 score points decrease

29 countries have deteriorated

50.8 African average

SPOTLIGHTS

THE INTERNATIONAL CRIMINAL COURT (ICC)

- In recent years, the International Criminal Court (ICC) has promoted Africans to senior positions in the court:
  - Judge Joyce Aluoch (Kenya) became the 1st Vice-President of the ICC for a 3 year term in March 2015.
  - Fatou Bensouda (Gambia) replaced Luis Moreno-Ocampo (Argentina) in June 2012 for a 9 year term as Prosecutor of the ICC.
- Since coming into force in July 2002, 24 cases in 10 situations have been brought under investigation at the ICC. All but 1 of these have been situations in Africa.

Situation	Referral dates	Cases	Developments*
Central African Republic (I)	2005-2013	5 individuals indicted.	1 individual (Jean-Pierre Bemba) in ICC custody, trial ongoing. Trial of 4 others also ongoing.
Central African Republic (II)	2014		Investigation initiated.
Côte d'Ivoire	2011-2015	3 individuals indicted.	2 in ICC custody (including former President Laurent Gbagbo), trial ongoing. 1 in custody of Ivorian authorities.
Democratic Republic of Congo	2006-2012	6 individuals indicted.	2 individuals convicted and sentenced for 14 and 12 years. 1 in ICC custody. 1 acquitted. 1 released. 1 fugitive.
Kenya	2011-2015	9 individuals indicted.	2 trials ongoing. 4 proceedings finished with charges dismissed including those of incumbent President Uhuru Kenyatta. 1 fugitive and 2 arrested.
Libya	2011	3 individuals indicted.	1 deceased (former President Muammar Gaddafi), 1 in custody of Libyan authorities (Saif al-Islam Gaddafi), 1 case held inadmissible.
Mali	2015	1 individual indicted.	1 in ICC custody.

Situation	Referral dates	Cases	Developments*
Sudan (Darfur)	2007-2010	7 individuals indicted.	5 fugitives including current President Omar Al-Bashir. 2 proceedings finished (1 deceased and 1 charges dismissed).
Uganda	2005	5 warrants of arrest issued against members of the Lord's Resistance Army.	2 individuals deceased. Charges heard against 1 individual on 21 January 2016. 2 individuals, including Joseph Kony, remain at large.

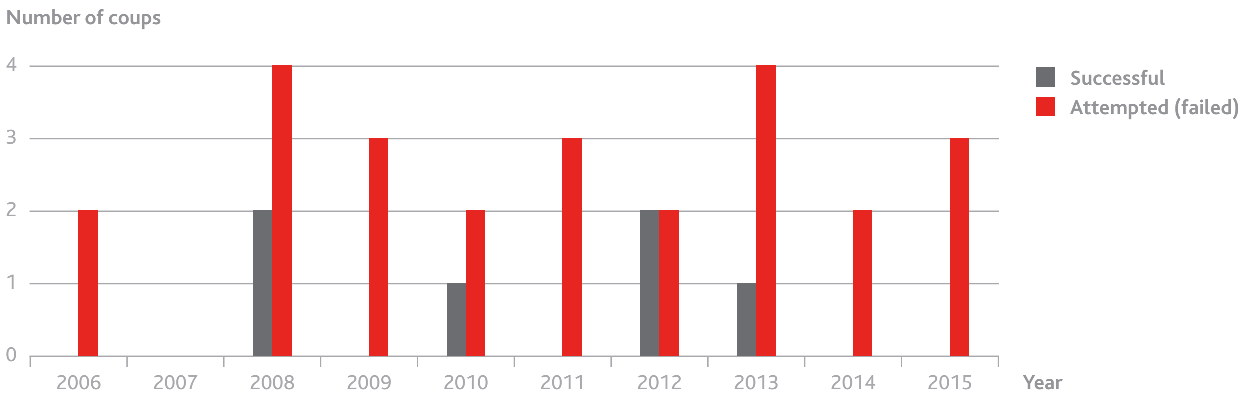
* All charges brought relate to crimes against humanity and war crimes, except in the case of Omar Al-Bashir, who is also charged with 3 counts of genocide.

International Criminal Court, 2015

COUPS D'ÉTAT

- 31 attempted coups d'état since 2006 on the continent, compared to 28 in the previous 10 years.
- 25 failed, compared to 16 in the previous 10 years.

Coups d'état in Africa, 2006-2015



Center for Systemic Peace, 2015; The Guardian, 2015, 2015b

Safety & Rule of Law

ACCOUNTABILITY

IIAG RESULTS SINCE 2006

Since 2006, the African average for *Accountability* has decreased by -0.9 score points from 36.4 to 35.5, 1 of 6 (of 14) sub-category deteriorations over this time-period. 28 countries (out of 54) have deteriorated over this period (South Sudan and Sudan included, showing deterioration since 2011), and 26 improved.

MIF, 2015

LARGEST IMPROVEMENT
Côte d'Ivoire: +14.8. From 18.5 to 33.3.

LARGEST DETERIORATION
Eritrea: -12.5. From 28.8 to 16.2.

-0.9 score points decrease

28 countries have deteriorated

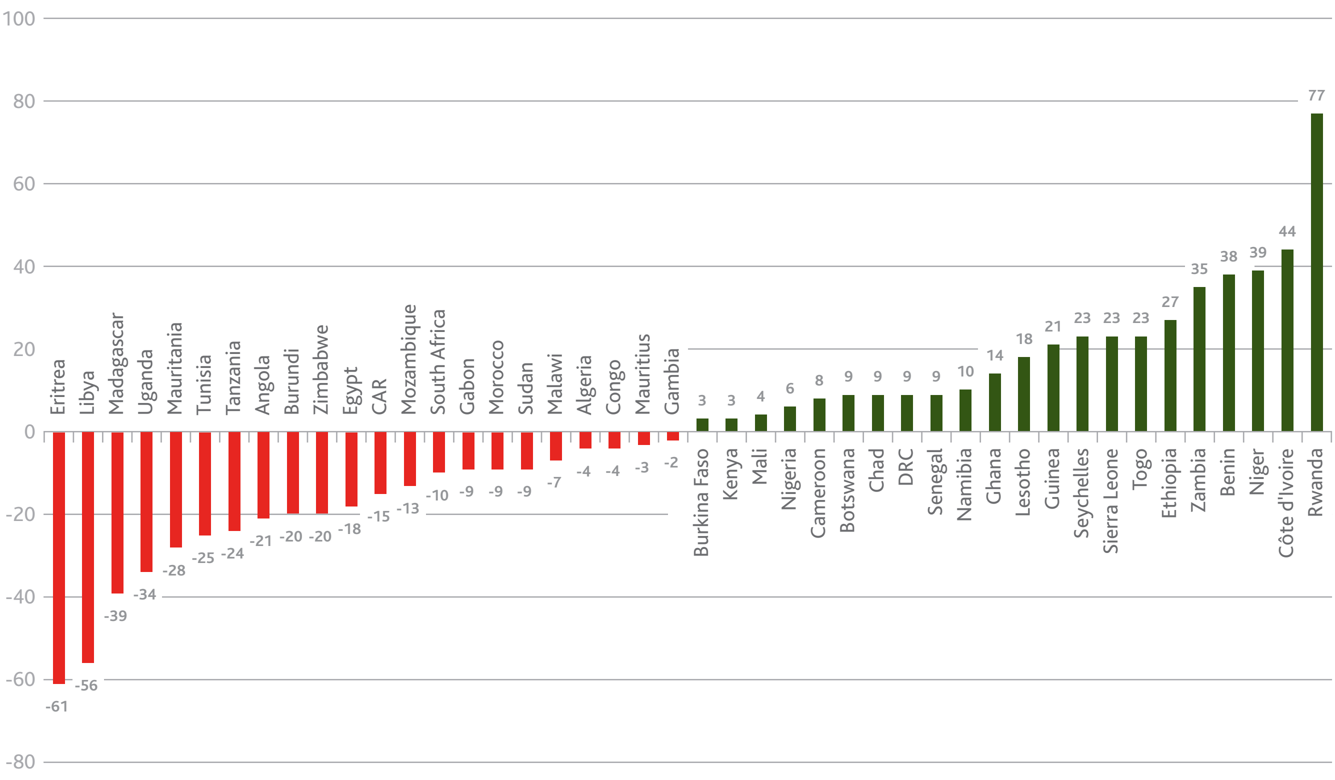
35.5 African average

SPOTLIGHTS

CORRUPTION

- The continent's performance relative to the rest of the world in Transparency International's Corruption Perceptions Index (CPI) shows a mix of results when comparing rank performance in 2006 and 2014.
- Whilst it is important to note that a countries rank can change because new countries can enter the CPI and others drop out in different years, some African countries nevertheless show alarming declines in world rank whilst others show impressive gains. Of the 44 comparable countries included in the CPI in 2006 and 2015, exactly ½ (22) have gone down in the global rankings and the other ½ up in the rankings[1].

CPI: difference in world rank 2006-2015

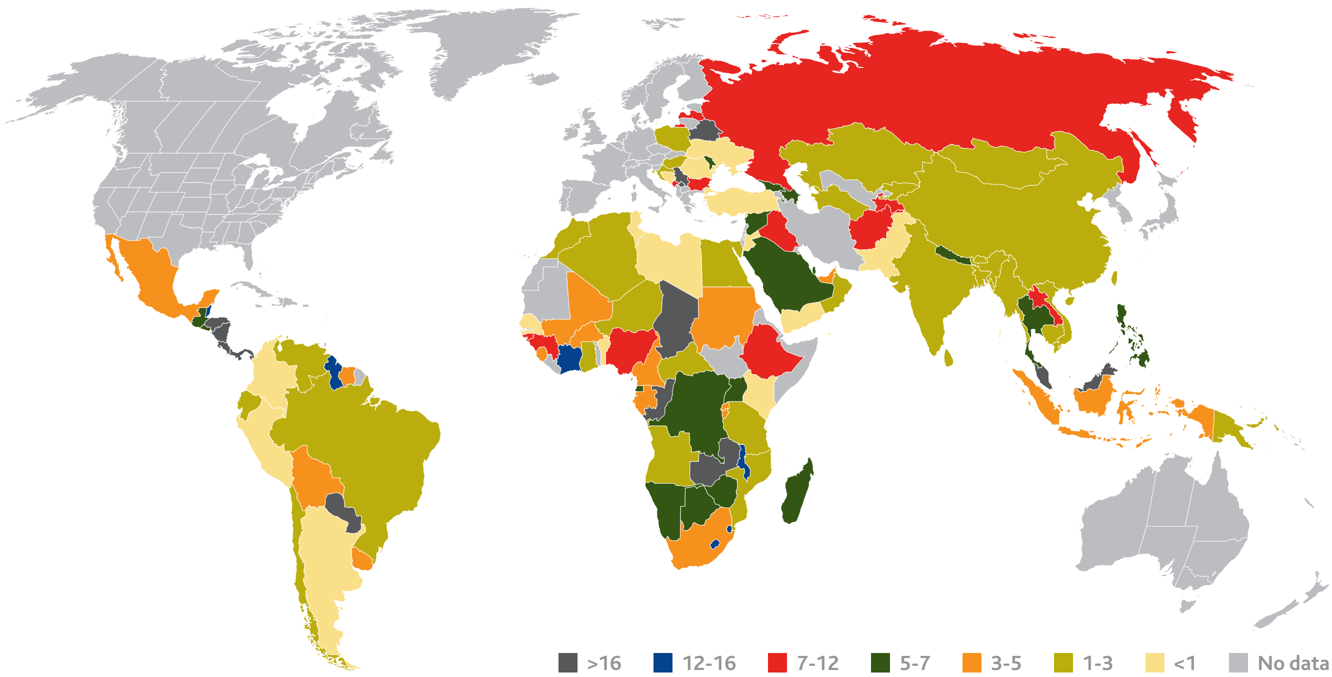


Transparency International, 2006, 2015

ILLICIT FINANCIAL FLOWS (IFFs)

- Illicit Financial Flows (IFFs) are a global challenge, but their negative impact on the African continent is huge. According to the latest figures, between 2000 and 2008 Africa lost in excess of $50 billion annually.

Heat map of IFFs from countries as a % of GDP



IFFs from Africa in numbers

Africa is losing
>$50 billion annually

Africa is estimated to have lost **>$1 trillion** over the last 50 years.

This is roughly equivalent to:

All Official Development Assistance (ODA) received by Africa.

UNECA, 2015

Kenya's tax loss from trade misinvoicing could be as high as 8.3% of government revenue, resulting in billions of lost tax revenue.

[1] Rank comparison is used here rather than scores as in 2012 the CPI adopted an updated methodology to better capture changes in perceptions of corruption in a country over time. CPI scores prior to 2012 are not comparable.

Safety & Rule of Law

PERSONAL SAFETY

IIAG RESULTS SINCE 2006

Since 2006, the African average score for *Personal Safety* has decreased by -7.1 score points from 51.1 to 44.0. This is by far the largest of the 6 (of 14) sub-category deteriorations across the entire IIAG over this time-period. 36 countries (out of 54) have deteriorated over this period (South Sudan and Sudan included, showing deterioration since 2011), with only 18 improving. 5 countries (Libya, CAR, Somalia, Tunisia, and Burkina Faso) have deteriorated by over -20.0 score points and a further 12 countries have deteriorated between -10.0 and -20.0 points since 2006.

MIF, 2015

LARGEST IMPROVEMENT
Côte d'Ivoire: +17.2. From 33.5 to 50.7.

LARGEST DETERIORATION
Libya: -36.8. From 57.3 to 20.5.

-7.1 score points decrease

36 countries have deteriorated

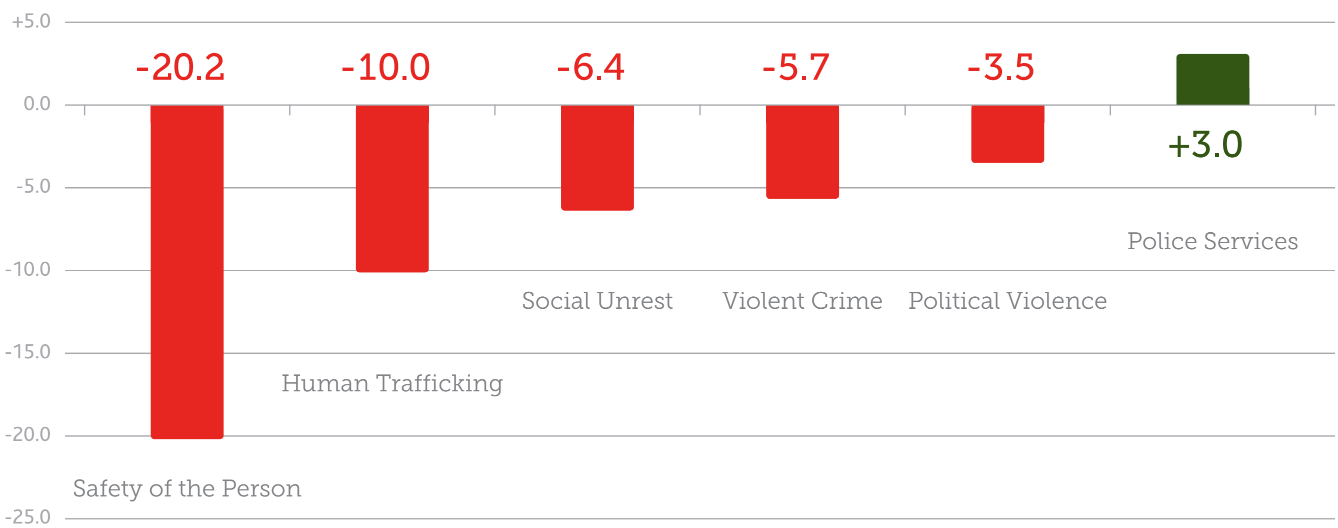
44.0 African average

SPOTLIGHTS

PERSONAL SAFETY

- Several aspects of citizens' personal safety have deteriorated since 2006. Indicators collected for the 2015 IIAG show that all but 1 of the 6 indicators that make up the *Personal Safety* sub-category have deteriorated.
- The most noticeable of these is *Safety of the Person*, which measures perceived levels of criminality in a country. This indicator has, on average, deteriorated by -20.2 score points.

IIAG score change, *Personal Safety* indicators, 2006-2014

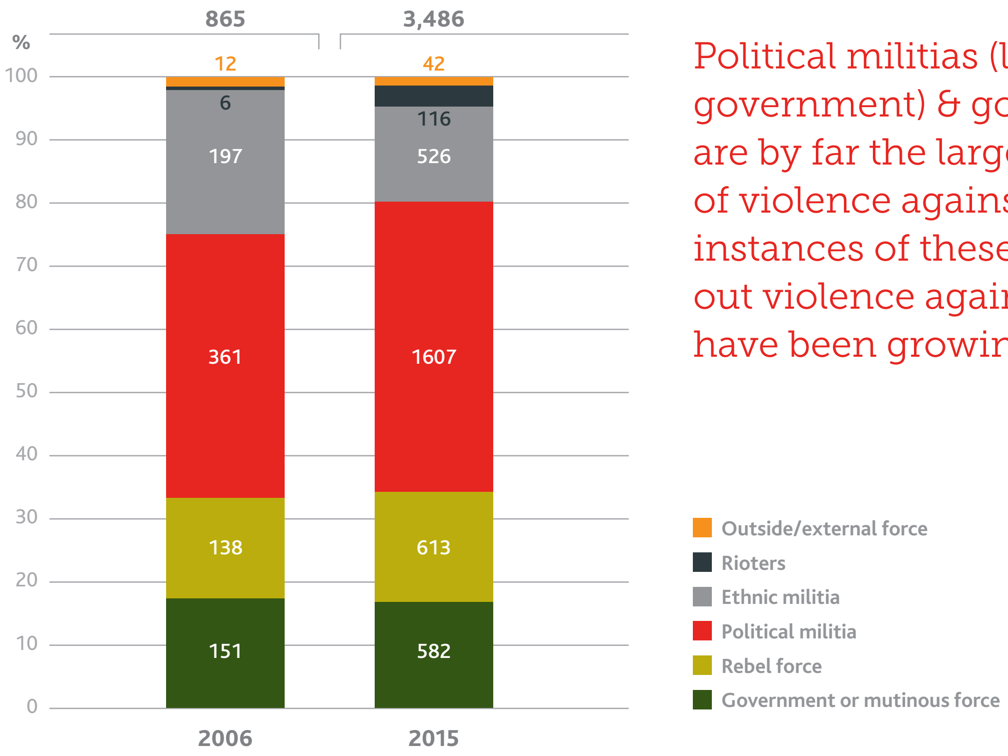


MIF, 2015

VIOLENCE AGAINST CIVILIANS

- Recorded violence against civilians[1] has escalated since 2006. In 2006 there were 865 recorded instances of violence against civilians and by 2015 this had grown to 3,486.

Instances of violence against civilians, 2006 and 2015



ACLED, 2015

Political militias (linked to government) & governments are by far the largest perpetrators of violence against civilians & instances of these actors carrying out violence against civilians have been growing since 2006.

Across Africa, violence against civilians averages at 30% of total political violence. In Zimbabwe, it accounts for 75%.

[1] Violence against civilians occurs when any armed/violent group attacks civilians. By definition, civilians are unarmed and not engaged in political violence.

Safety & Rule of Law

NATIONAL SECURITY

IIAG RESULTS SINCE 2006

Since 2006, the African average for *National Security* has decreased by -1.2 score points from 76.0 to 74.8. This is 1 of 6 (of 14) sub-category deteriorations over this time-period. 27 (out of 54) countries have deteriorated over this period (South Sudan included, showing deterioration since 2011), and 27 improved (Sudan included, showing improvement since 2011).

MIF, 2015

LARGEST IMPROVEMENT
Liberia: +35.4. From 47.4 to 82.8.

LARGEST DETERIORATION
Libya: -49.4. From 84.9 to 35.5.

-1.2 score points decrease

27 countries have deteriorated

74.8 African average

SPOTLIGHTS

ARMED CONFLICTS

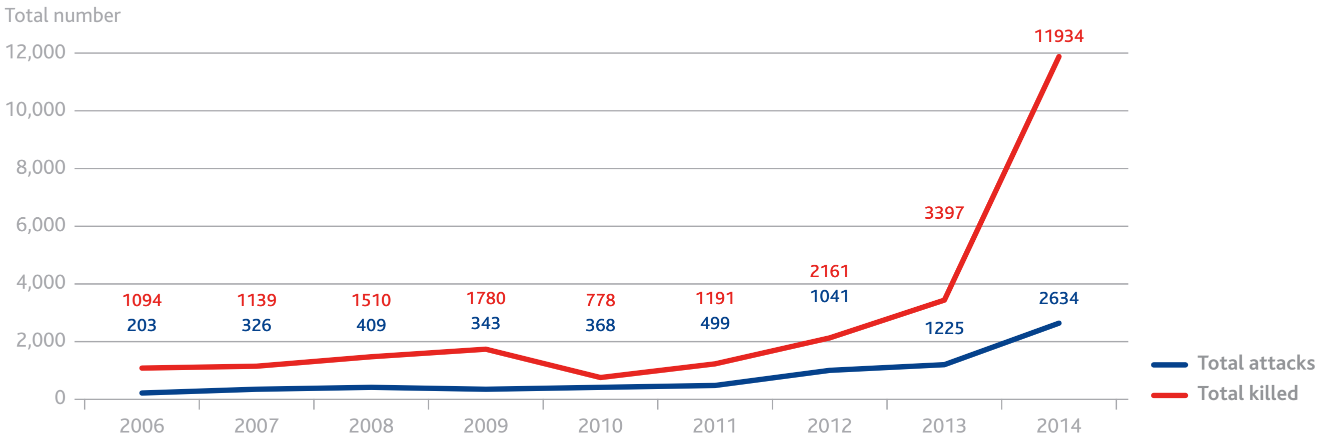
- Since 2006, there has been a decrease in armed conflict[1] on the African continent compared to the previous 10 year period. From 1996 to 2005 there were 136 armed conflicts, whilst this decreased to 111 from 2006 to 2014.
- Recent years have also seen a decrease in the proportion of conflicts that are interstate. Domestic (internal) conflicts are the most dominant type of armed conflict. Since 2006, there has been a rise in the proportion of conflicts that occur between the government of a state and 1 (or more) internal opposition group(s), with intervention from other states on 1 or both sides (internationalised internal conflict).

Uppsala University, 2015

THE TERRORIST THREAT

- Terrorist attacks have noticeably changed target, from institutions and foreign embassies to private citizens, including nationals. Over the past 10 years, the 3 most targeted 'target types' have been, in order of magnitude, private citizens and property, police and government.
- There were a total of 7,048 terrorist attacks[2] on the African continent between 2006 and 2014, claiming 24,983 lives.
- Terrorism levels have increased markedly since 2006. 2014 saw an 89% increase in both terrorist attacks and casualties compared to 2006.

Total number of terrorist attacks and related deaths on the African continent, 2006-2014



START, 2015

PERSONS OF CONCERN

- From 2006 to 2014, the number of 'Persons of Concern' (PoC)[3] on the African continent almost doubled from around 9.7 million to approximately 17.8 million.
- The vast majority of these are Africans. The number of foreign PoC in Africa has also grown, from 393,000 in 2006 to 751,000 in 2014.
- The number of African PoC outside of the continent has grown, from 715,000 in 2006 to 961,000 in 2014.
- Many PoC are hosted by countries that have experienced or are experiencing conflict, or that have such neighbours, primarily due to the large numbers of internally displaced people within these countries.

	Top 5 host countries 2006	Persons of Concern (millions): 2006	Top 5 host countries 2014	Persons of Concern (millions): 2014
1	Uganda	2.2	DRC	3.7
2	DRC	1.8	Sudan	2.5
3	Sudan	1.6	South Sudan	2.1
4	Côte d'Ivoire	0.8	Nigeria	1.2
5	Tanzania	0.6	Somalia	1.2

- Opening doors: In 2014, Ethiopia was host to the largest amount of refugees on the African continent. In 2006, the country hosted 97,000 refugees and this had grown to 660,000 in 2014.

	Top 5 host countries 2006	Total number of refugees: 2006	Top 5 host countries 2014	Total number of refugees: 2014	% increase of refugees hosted (2006 and 2014), 2014 top 5 hosts
1	Tanzania	485,000	Ethiopia	660,000	580%
2	Chad	287,000	Kenya	551,000	102%
3	Kenya	273,000	Chad	453,000	58%
4	Uganda	272,000	Uganda	385,000	42%
5	DRC	208,000	Sudan	278,000	42%

UNHCR, 2015

DRUGS

- Growing trafficking, production and consumption of drugs on the continent is undermining the governance landscape. The estimated yearly value of cocaine transiting through West Africa alone, at $1.25 billion, is significantly more than the annual national budgets of several countries in the region.
- In 2010, 18 of 172 tonnes of pure cocaine trafficked to Europe passed through West African transit hubs.
- Criminal networks operate in poor regions affected by political instability, unemployment and corruption.

Value of cocaine passing annualy through West Africa ($, billion).

West Africa Commission on Drugs, 2014

Roughly=

The total combined remittance flows of Cameroon, Côte d'Ivoire, Niger, Sierra Leone and Togo in 2013 ($1.2 billion).

and

The equivalent of the total combined annual inward Foreign Direct Investment (FDI) flows of Benin, Burkina Faso, Cabo Verde, Guinea-Bissau and Senegal in 2014 ($1.2 billion).

[1] The Uppsala Conflict & Data Project defines conflict as: 'a contested incompatibility that concerns government and/or territory where the use of armed force between two parties, of which at least one is the government of a state, results in at least 25 battle-related deaths.'

[2] Data from the Global Terrorism Database (GTD).

[3] 'Persons of Concern' is a general term used by UNHCR to describe all people whose protection and assistance needs are of interest to UNHCR. Some of the other Persons of Concern include: Asylum-Seekers, Stateless Persons, Internally Displaced People, Returnees.

Participation & Human Rights

PARTICIPATION

IIAG RESULTS SINCE 2006

Since 2006, the African average for *Participation* has increased from 44.4 to 45.9. This is 1 of 8 (of 14) sub-category improvements over this time-period (+1.5 points). 26 out of 54 countries have improved over this time-period, 27 deteriorated (one country, Swaziland, has remained static at a low score of 9.5).

MIF, 2015

LARGEST IMPROVEMENT
Tunisia: +50.3. From 19.3 to 69.6.

LARGEST DETERIORATION
Guinea-Bissau: -47.2. From 70.2 to 23.0.

+1.5 score points increase

27 countries have deteriorated

45.9 African average

SPOTLIGHTS

ELECTIONS

- There have been a total of 97 elections since 2006: 69 presidential, 28 general.
- 3 countries have not had an election since 2006: Eritrea, Libya and Somalia.[1]
- Zambia has had the most elections since 2006: 4.

Psephos Adam Carr Election Archive, 2015; National Democratic Institute, 2015

- The election landscape in Africa has seen several changes of Heads of State since 2006.

Only 18 of the 53 Heads of State in power in 2006 are still in office in 2016. With elections planned for this year, this number could drop further.

Of the 35 Heads of State that have left power, 8 died in office & 10 stepped down as the result of a coup, arrest or uprising.

[1] Elections for the Head of State. This does not include Lesotho, Morocco and Swaziland, which are ruled by monarchs.

End of Presidential Mandates: 2006-2015

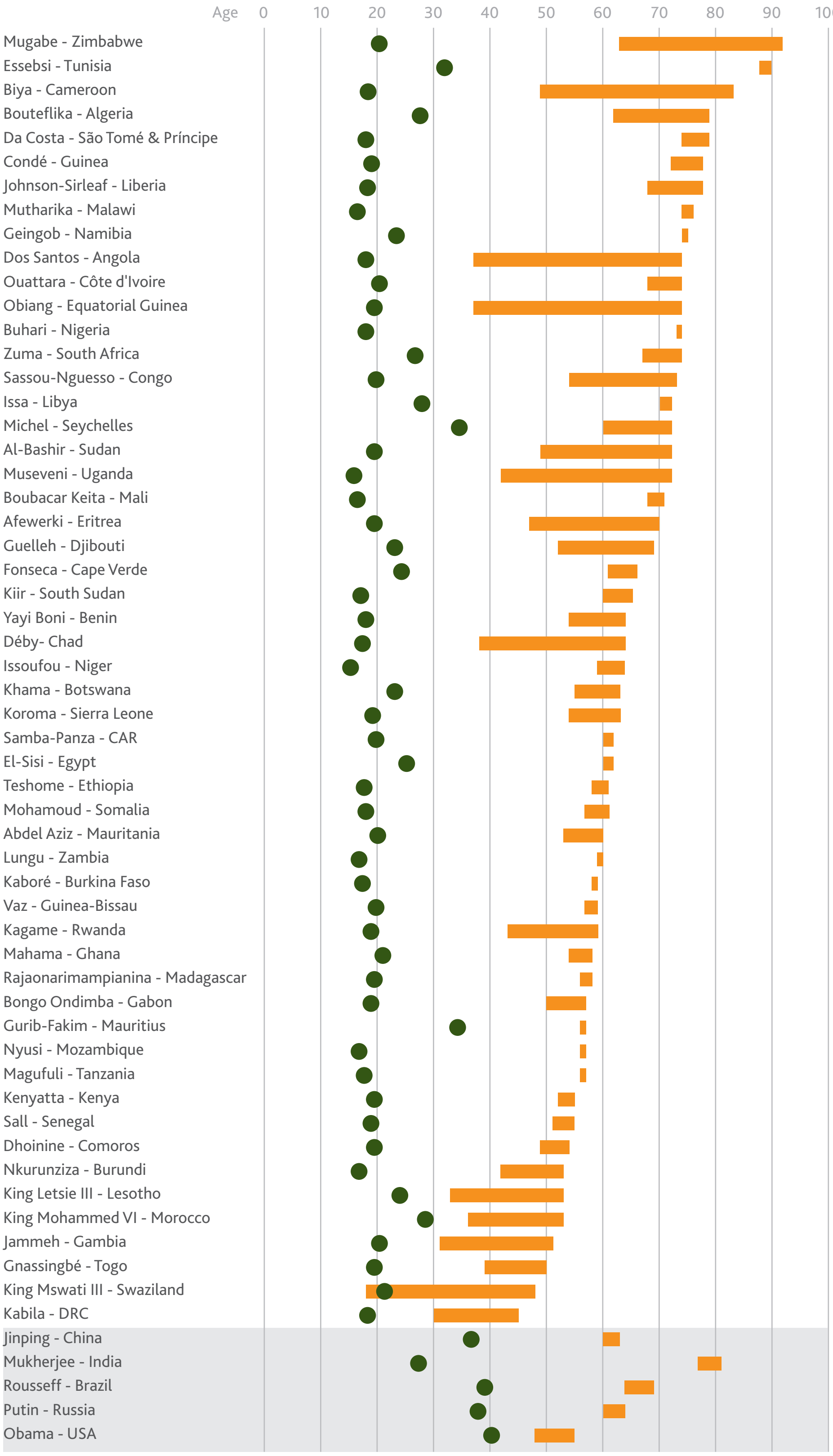
🟠 Head of State who stepped down, or was deposed, as a result of a coup, arrest or uprising

🟢 Died in office

Country	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Algeria										
Angola										
Benin	●									
Botswana			●							
Burkina Faso									🟠	
Burundi										
Cabo Verde						●				
Cameroon										
CAR								●	●	
Chad										
Comoros	●					●				
Congo										
Côte d'Ivoire						🟠				
DRC										
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 & Príncipe						●				
Senegal							●			
Seychelles										
Sierra Leone		●								
Somalia				🟠			●			
South Africa			●	●						
South Sudan										
Sudan										
Swaziland										
Tanzania										●
Togo										
Tunisia						🟠			●	
Uganda										
Zambia			🟢			●			🟢	
Zimbabwe										

Participation & Human Rights

Age and tenure of African leaders and prominent global leaders in 2016



Africa's 10 longest serving Presidents

Teodoro Obiang Nguema Mbasogo
Equatorial Guinea
37 years

José Eduardo dos Santos
Angola
37 years

Paul Biya
Cameroon
34 years

Yoweri Museveni
Uganda
30 years

Robert Mugabe
Zimbabwe
29 years

Idriss Déby
Chad
26 years

Omar al-Bashir
Sudan
23 years

Isaias Afwerki
Eritrea
23 years

Yahya Jammeh
Gambia
20 years

Denis S. Nguesso
Congo
19 years

Tenure to 2016
Median age of population

BBC, 2015; CIA, 2015

PRESIDENT 'FOR LIFE'

The changing constitutions

Clinging on

President/Country	Key event and date	
Yoweri Museveni, Uganda	2005	At the age of 72, now serving a 5th term after changing the constitution in 2005 to serve a 3rd.
Paul Biya, Cameroon	2008	Revised constitution in 2008 to eliminate presidential term limits.
Pierre Nkurunziza, Burundi	2015	Contravening the Arusha Agreement ran for and won a 3rd term in 2015. In the ensuing violence, 300,000 people fled to neighbouring Rwanda and Tanzania.
Denis Sassou N'Guesso, Congo	2015	Organised a national referendum for 25 October 2015, which saw him win approval for a 3rd term by a landslide.

Departing within the rules

President/Country	Key event and date	
Abdoulaye Wade, Senegal	2012	85-year-old President Abdoulaye Wade proposed constitutional changes that would have ensured his success in the next elections by reducing the number of votes needed to win an election. Eventually backed down under pressure and withdrew the amendment. Though he ran for a 3rd term, he conceded defeat in the election.
Armando Guebuza, Mozambique	2014	Stepped down after 2 terms in power. His party, Frelimo, had ruled Mozambique since independence from Portugal in 1975.
Goodluck Jonathan, Nigeria	2015	The concession of defeat by the Nigerian President, Goodluck Jonathan, after elections in March marked the 1st time in the nation's history that an incumbent leader has been ousted at the ballot box.

To watch

President/Country	Key event and date	
Joseph Kabila, DRC	2016	Won a 2nd 5-year mandate in disputed elections in 2011, and is constitutionally barred from seeking a 3rd term in 2016. In January 2015 tentative attempts to overturn the term limit were met with riots.
Idriss Déby, Chad	2016	Came to power in 1990 and removed term limits in 2005. Announced that he will run again for the Presidency in February 2016.
Paul Kagame, Rwanda	2016	President Paul Kagame has effectively ruled Rwanda since the genocide of 1994, but became president in 2000. The 57 year-old will run for a 3rd 7 year term in 2017 after parliament voted to support a change in the constitution in 2015, allowing him to run again.

The Telegraph, 2015

Participation & Human Rights

RIGHTS

IIAG RESULTS SINCE 2006

Since 2006, the African average for *Rights* has dropped marginally by -0.8 score points from 48.1 to 47.3. This is 1 of 6 (of 14) sub-category deteriorations over this time-period (-0.8 points). 28 countries (out of 54) have deteriorated over this time-period (South Sudan and Sudan included, showing deterioration since 2011), 26 improved.

MIF, 2015

LARGEST IMPROVEMENT
Tunisia: +25.4. From 40.0 to 65.3.

LARGEST DETERIORATION
Mali: -18.6. From 75.0 to 56.5.

-0.8 score points decrease

28 countries have deteriorated

47.3 African average

SPOTLIGHTS

FREEDOM

- According to the IIAG, on average the extent to which citizens and organisations can express opinion freely on the continent has not changed much since 2006. At the country level however, the IIAG indicator *Freedom of Expression* shows improvement and deterioration across countries:

***Freedom of Expression*, most improved countries 2006-2014**	
Tunisia	+31.6
Lesotho	+17.3
Côte d'Ivoire	+14.9
Libya	+13.9
Liberia	+13.5

***Freedom of Expression*, most deteriorated countries 2006-2014**	
Madagascar	-22.7
Equatorial Guinea	-17.8
Mali	-17.0
Seychelles	-13.5
Benin	-13.3

74% of journalists killed in Africa since 2006 were political journalists (73 of a total 99 killed).

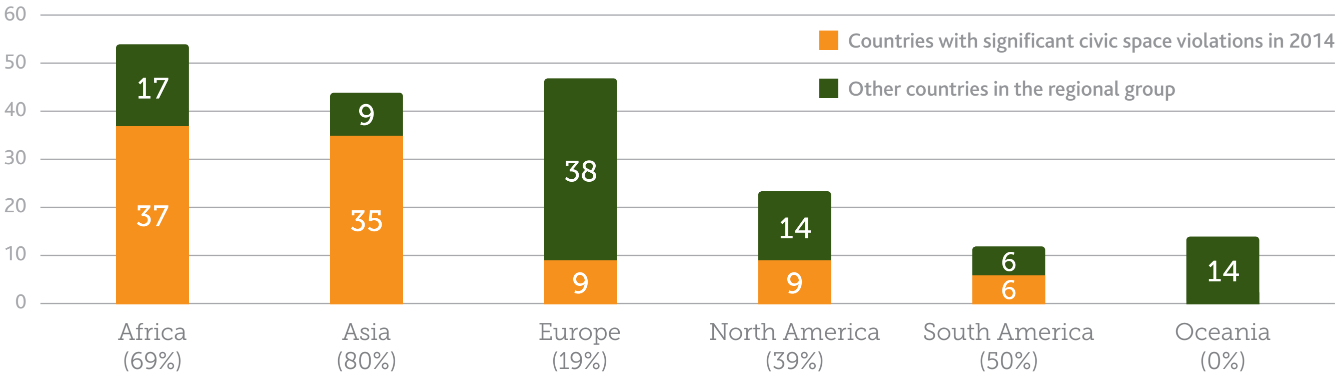
The number of African countries classified as "not free" by Freedom House has increased from 18 in 2006 to 24 in 2015.

Committee to Protect Journalists, 2016; Freedom House, 2015; MIF, 2015

CIVIL SOCIETY

- In 2014, significant violations of civic space[1] took place in 37 African countries.

Serious violations of civic space by continent



CIVICUS, 2015

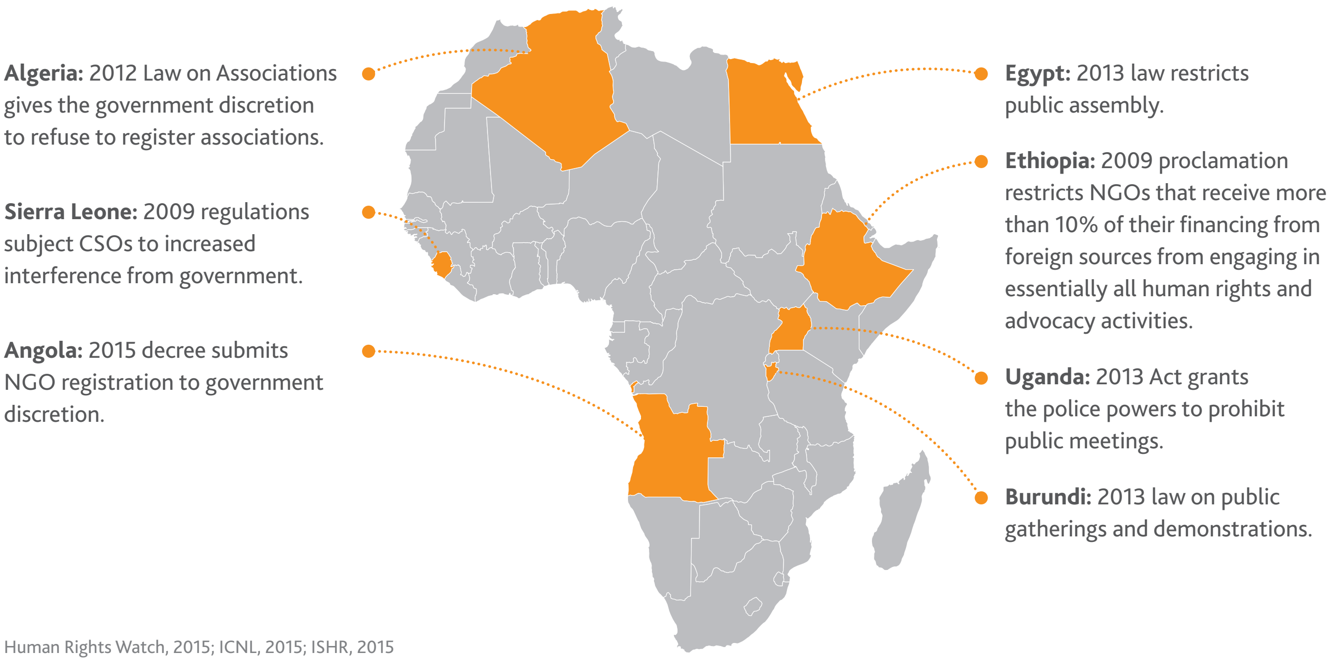
- 24 countries have seen a restriction of associational and organisational rights since 2006. Only 10 countries have shown improvement.

Freedom House, 2006, 2015

- *Freedom of Association & Assembly*, which measures the extent to which citizens can associate freely in public and participate in civic and political organisations, and workers can organise into trade unions, is one of the 10 most deteriorated indicators in the IIAG since 2006.

MIF, 2015

Legislation introduced since 2006 restricting freedom of assembly, selected countries



Human Rights Watch, 2015; ICNL, 2015; ISHR, 2015

[1] Violations of core civil society freedoms of expression, association and peaceful assembly.

Participation & Human Rights

GENDER

IIAG RESULTS SINCE 2006

Since 2006, the African average for *Gender* has increased by +2.9 score points from 52.0 to 54.8. This is 1 of 8 (of 14) sub-category improvements over this time-period. 38 countries (out of 54) have improved their score in *Gender* since 2006 (including Sudan, showing improvement since 2011), and 15 deteriorated. One country (South Sudan since 2011) has remained static.

MIF, 2015

LARGEST IMPROVEMENT
Burundi: +23.3. From 53.3 to 76.6.

LARGEST DETERIORATION
Gambia: -10.2. From 66.0 to 55.8.

+2.9 score points increase

38 countries have improved

54.8 African average

SPOTLIGHTS

WOMEN IN POLITICS

Strides forward in female representation in parliament

- The number of women in parliament in sub-Saharan Africa has increased from 17% in 2006 to 23% in 2015.
- Over the past 10 years, Rwanda has consistently been the highest ranked country in the world for the percentage of women in parliament. In 2015, it was 1 of only 2 countries where over ½ of the seats in the lower or single house are taken by women.
- Of the 38 lower houses of parliament in the world that have reached the 30% threshold considered necessary for women to have an impact on decision-making, 16 are African. 10 years ago, only 5 had reached this point.

Inter-Parliamentary Union, 2015

IIAG indicator *Women in Parliament*: progress but some countries show negative trends

2014 Score

Top 5	
Rwanda	100.0
Seychelles	68.7
Senegal	66.9
South Africa	65.0
Namibia	64.7

Bottom 5	
Congo	11.6
Nigeria	10.5
Swaziland	9.7
Comoros	4.7
Egypt	3.1

Change since 2016

Most improved	
Algeria	+39.8
Senegal	+36.8
Cameroon	+34.8
Angola	+34.2
Lesotho	+23.5

Most deteriorated	
Mauritius	-8.6
Swaziland	-7.2
Gambia	-6.0
Sierra Leone	-3.3
Zambia	-3.0

MIF, 2015

Less progress for women in ministerial positions

- The average percentage of women in ministerial positions in Africa rose by less than 5% between 2005 and 2015, from 15% to 19%.
- Cabo Verde has shown the largest increase of women in ministerial positions during this period, from 19% to 53%, making it the only country in Africa where ½ of the cabinet is female.

Inter-Parliamentary Union, 2015

Female heads of state

- In 2005, President Ellen Johnson Sirleaf became the 1st elected female president in Africa.
- In 2015, 3 of the 18 female Heads of State in the world were in Africa: President Catherine Samba-Panza (CAR), President Ellen Johnson Sirleaf (Liberia) and President Ameenah Gurib-Fakim (Mauritius).

World Economic Forum, 2015

WOMEN IN EMPLOYMENT

- In 2014, 61% of the female population in Africa aged 15 and over was economically active. This is one of the highest labour force participation rates in the world.
- The IIAG indicator *Women's Participation in the Labour Force* has shown only a slight improvement of +0.5 points over the past 10 years.
- In 2014, female labour force participation ranged from nearly 90% in Tanzania, to 16% in Algeria.
- However, on average, only 13% of women in Africa reported having received any money from an employer in the form of a salary or wages in 2014.

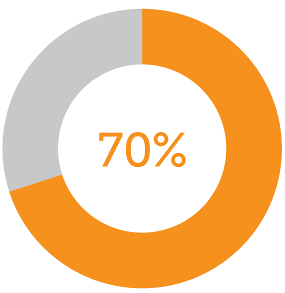
FAO, 2012; MIF, 2015; World Bank, 2015

GENDER VIOLENCE

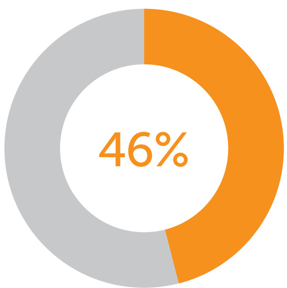
- The reported prevalence of physical violence is highest in Africa, with almost all countries reporting lifetime prevalence of over 40%.

UN, 2015

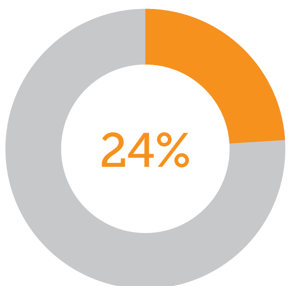
- In 2015, less than ½ of African countries had legislation on domestic violence.



Countries where legislation specifically addresses sexual harassment



Countries where legislation exists on domestic violence



Countries where legislation explicitly criminalises marital rape

World Bank, 2015

Sustainable Economic Opportunity

PUBLIC MANAGEMENT

IIAG RESULTS SINCE 2006

Since 2006, the African average for *Public Management* has increased slightly by +0.4 score points from 45.6 to 46.0. This is 1 of 8 (of 14) sub-categories to register improvement during this time-period. 29 countries (out of 54) have improved since 2006 (including Sudan, showing improvement since 2011), while 25 countries have shown deterioration (including South Sudan, showing deterioration since 2011).

MIF, 2015

LARGEST IMPROVEMENT
São Tomé & Príncipe: +13.8. From 30.2 to 44.1.

LARGEST DETERIORATION
Libya: -26.3. From 43.5 to. 17.2.

+0.4 score points increase

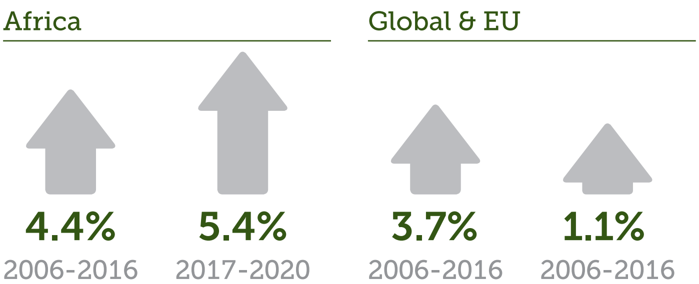
29 countries have improved

46.0 African average

SPOTLIGHTS

ECONOMIC GROWTH

GDP growth, 2006-2016 and 2017-2020



In 2014, Kenya, Nigeria, Tanzania, Uganda & Zambia all completed rebasing exercises, which led to significant revaluations of GDP. Nigeria's GDP nearly doubled.

Brookings, 2015

- Since 2006, Africa has experienced an average 4.4% growth. Over the next 4 years (2017-2020), economic growth in Africa is expected to be 5.4%.
  - Growth is expected to be lower in the next 4 years in 17 countries[1].
  - Angola will see the greatest slowdown. Having an average 8.2% growth over the past 10 years, it will slow to 4.5% in the next 4 years.

IMF, 2015

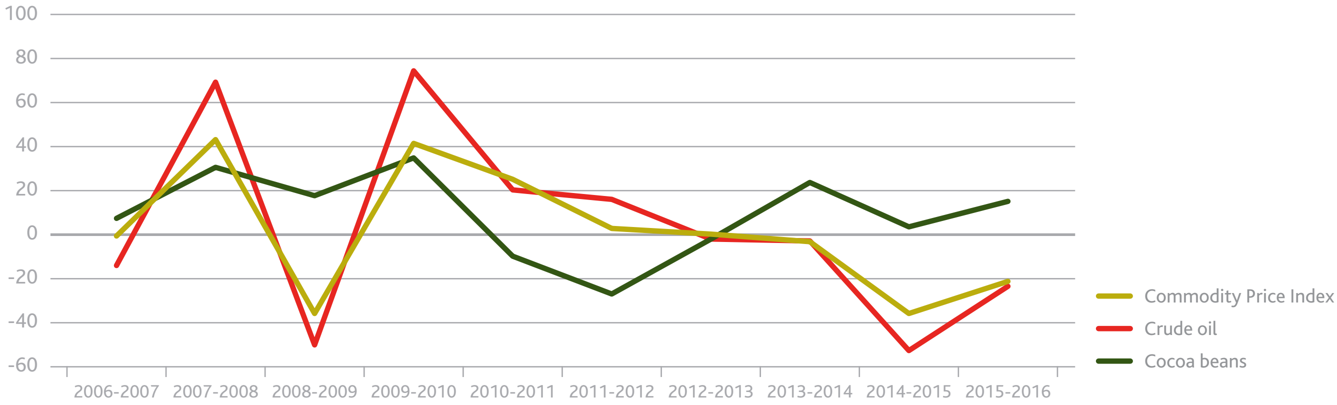
The potential impact of commodity price trends

- Commodity prices have fallen by over ¼ since 2006, with crude oil falling by -52%.
  - Growth in resource-rich countries is expected to slow as governments face fiscal retrenchment. Oil exporters account for just over ½ of continental GDP.
  - The 5 fastest growing African countries are not all resource-rich – Ethiopia and Rwanda may signal new 'poles of growth'.
  - 10 of the 16 resource-rich countries in Africa rank in the bottom ½ of the IIAG sub-category *Public Management*. Only 5 resource-rich countries have registered improvement since 2006.
- On the contrary, cocoa has seen the largest increase in commodity price since 2006, increasing in value by almost 87%. Côte d'Ivoire and Ghana are the world's largest and 2nd largest exporters of cocoa.

IMF, 2015, 2015(b); MIF, 2015

[1] No data for Somalia.

Annual price change, selected commodities (%)

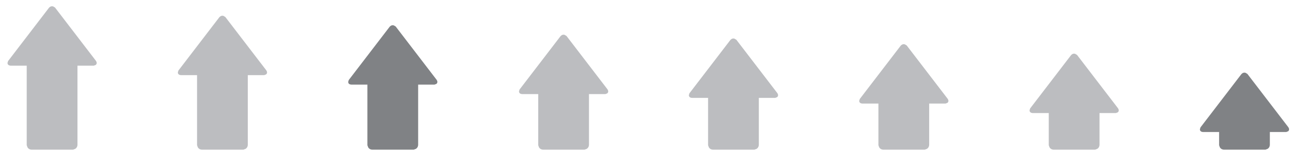


IMF, 2015(b)

Better than most, but still vulnerable

- 6 of the 20 fastest growing economies globally over the past 10 years are African – Ethiopia, Angola, Rwanda, Mozambique, Zambia and Ghana.

Average GDP growth (constant, $), fastest growing African economies and selected regions (2006-2016, average)



10.2%	8.2%	7.9%	7.4%	7.3%	7.0%	6.9%	3.0%
Ethiopia	Angola	Emerging & developing Asia	Rwanda	Mozambique	Zambia	Ghana	Latin America & the Caribbean

IMF, 2015

DOMESTIC RESOURCE MOBILISATION

- Africa has improved in mobilising domestic revenues, with the African average for the IIAG indicator *Taxation Capacity* up by +2.1 score points since 2006. Within the *Public Management* sub-category in the IIAG, *Revenue Mobilisation* shows the largest number of countries improving since 2006: 38 out of 54.

MIF, 2015

DIVERSIFICATION

- On average, Africa has not experienced 'structural change'; manufacturing value added still only contributes 10% of GDP since 2006.
- Since 2006, 24 countries have improved in the IIAG indicator *Diversification*, which measures the extent to which exports are diversified.
- 14 of the 16 resource-rich countries are in the bottom ½ of the rankings for the IIAG indicator *Diversification*.

MIF, 2015; World Bank, 2015

EMPLOYMENT TRENDS

Fast economic growth has not been a job creating one

- The majority of employment in 2015 remained agricultural (60%) in sub-Saharan Africa, a decrease of 4% since 2006. The 2nd highest source of employment is wholesale and retail trade (10%) – an increase of +0.1% since 2006.
- Despite high levels of economic growth, underemployment and informal employment are expected to remain high over the next 5 years.
- Vulnerable employment – the share of own-account work and family employment – stood at over 75% in 2013.

ILO, 2015

Sustainable Economic Opportunity

BUSINESS ENVIRONMENT

IIAG RESULTS SINCE 2006

Since 2006, the African average for *Business Environment* has decreased by -1.3 score points from 42.0 to 40.7. This is 1 of 6 (of 14) sub-categories to show deterioration over this time-period. 28 countries (out of 54) have shown improvement since 2006, while 26 (including South Sudan and Sudan, showing deterioration since 2011) have shown a decrease in score.

MIF, 2015

LARGEST IMPROVEMENT
Rwanda: +17.5. From: 59.0 to 76.5.

LARGEST DETERIORATION
South Sudan: -18.8 (since 2011). From 30.2 to 11.5.

-1.3 score points decrease

28 countries have improved

40.7 African average

SPOTLIGHTS

INVESTMENTS

- Since 2006, Foreign Direct Investment (FDI) to Africa has increased from $36 billion to $58 billion.
- 9 countries have seen an increase in FDI of over $1 billion since 2006, in order of largest inflow of investment: South Africa, Mozambique, Congo, Ghana, Angola, Tanzania, Equatorial Guinea, Morocco and Chad.
- The top 10 investment destinations have changed since 2006 with 5 new countries joining the ranks and 5 dropping out.

Top 10 FDI destinations in Africa, 2006 and 2014

	Largest 2006	Largest 2014
1	Egypt	**South Africa**
2	Nigeria	Congo
3	Tunisia	**Mozambique**
4	Morocco	Egypt
5	Libya	Nigeria
6	Sudan	Morocco
7	Algeria	Ghana
8	Congo	**Tanzania**
9	Uganda	**Equatorial Guinea**
10	Ghana	**Angola**

World Bank, 2015

New investment: Africa's trading partners are diversifying

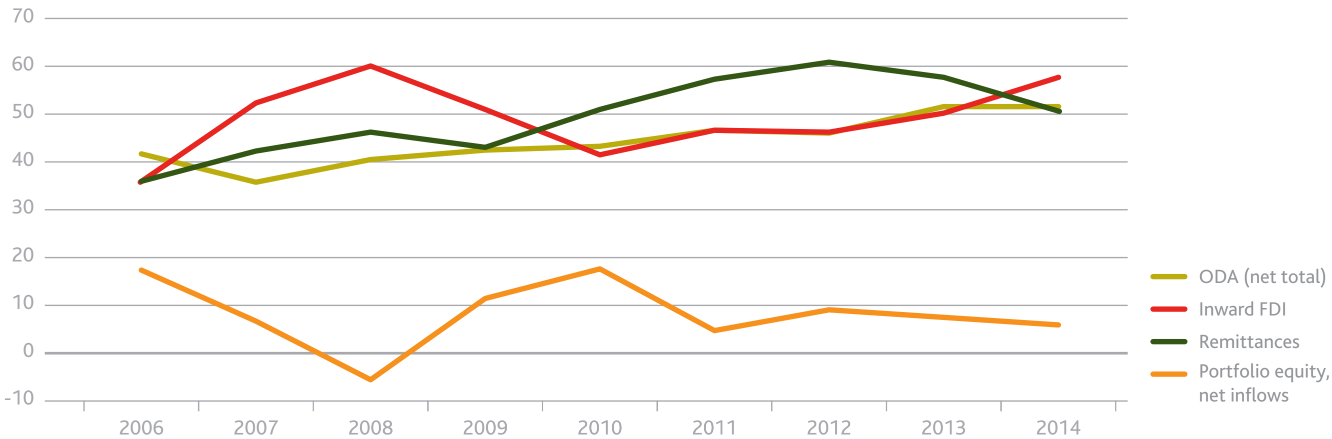
- Green field investments coming from China, India and African countries (primarily South Africa) have increased, from 17% (2003-2008) to just over a ¼ (2009-2014).
- FDI is diversifying away from mineral resources into consumer goods and services and is increasingly targeting urban centres.
- The EU remains an important trading partner for Africa, despite a decrease of 4% in the proportion of African exports bound for EU markets over the past decade.
- China now accounts for 13% of Africa's exports, up from 7% in 2006, but 70% of all exports are from 5 countries.
  - Angola, Congo, Equatorial Guinea, South Africa and Zambia.
  - Commodities and crude materials account for 85% of African exports to China.

AfDB, OECD, UNDP, 2014; UNCTAD, 2015

FINANCIAL FLOWS

- The financial landscape in Africa continues to shift. Private external flows and remittances are now driving growth in external financing.

External financial flows in Africa (current $, billion)



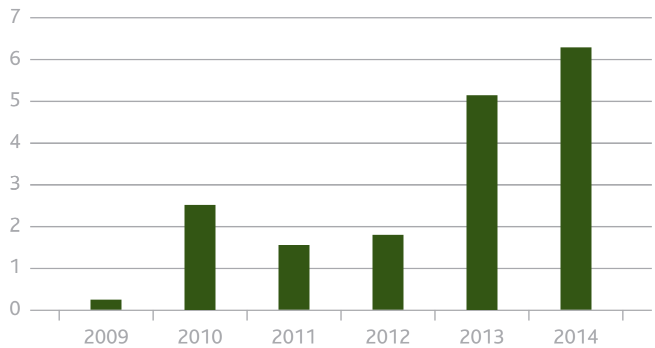
- Over the past 10 years, remittances have overtaken Official Development Assistance (ODA) as the largest source of external financial flows to Africa.

AfDB, OECD, UNDP, 2015; World Bank, 2015

- African sovereign borrowing has increased since 2009. Issuing countries include extractive commodity exporters such as Angola, Nigeria and Zambia, and larger, non-extractive commodity exporting countries such as Kenya and Ghana, and smaller countries such as Rwanda, Namibia and the Seychelles. Some countries have made multiple issues over the past 5 years, including Côte d'Ivoire, Ghana, Nigeria and Senegal.
- The stock of outstanding sovereign bonds in sub-Saharan Africa has grown from less than $1 billion in 2008 to over $18 billion by 2014.

ODI, 2015; UNDPI, 2015

Sub-Saharan Africa sovereign bond issues, $ billion



INTRA-AFRICAN TRADE

- The share of total intra-African trade has increased over the past decade, but still represents only 11% of Africa's trade with the world.
  - Intra-regional trade is most developed in the Southern Africa Development Community (SADC), with a 44% share of Africa's intra-regional trade in 2011.

UNCTAD, 2013, 2015

Stage	Progress	AMU 1989	CEN-SAD 1998	COMESA 1993	EAC 1999	ECCAS 1983	ECOWAS 1975	IGAD 1996	SADC 1992
2 2000-2007	Coordination and harmonisation of REC activities.								
	Gradual elimination of tariff and non-tariff barriers within RECs.	In progress	Not yet					In progress	
3 2008-2017	Regional FTAs.	Not yet	Not yet					Not yet	
	Regional customs unions.	Not yet	Not yet			Not yet	Not yet	Not yet	Not yet

MIF, 2014

Sustainable Economic Opportunity

INFRASTRUCTURE

IIAG RESULTS SINCE 2006

Since 2006, the African average for *Infrastructure* has increased by +5.3 score points from 31.2 to 36.5, the 2nd largest of 8 (of 14) sub-category improvements in the IIAG over this time-period. 46 countries (out of 54) have improved their score since 2006 (including South Sudan and Sudan, showing improvement since 2011), while 8 have shown deterioration.

MIF, 2015

LARGEST IMPROVEMENT
Kenya: +24.0. From 24.2 to 48.2.

LARGEST DETERIORATION
Libya: -15.0. From 48.3 to 33.3.

+5.3 score points increase

46 countries have improved

36.5 African average

SPOTLIGHTS

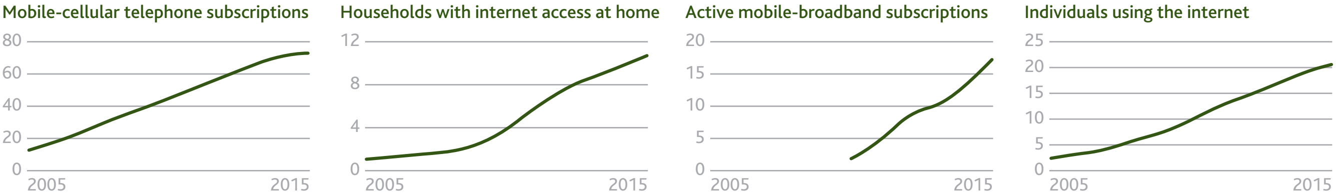
DIGITAL BOOM

- The most improved indicator across the IIAG since 2006 sits within the *Infrastructure* sub-category. *Digital Connectivity* shows an average improvement of +16.5 score points, with all countries on the continent improving.
- Internet access has grown substantially over the past decade, particularly in countries with large numbers of mobile phone subscribers.

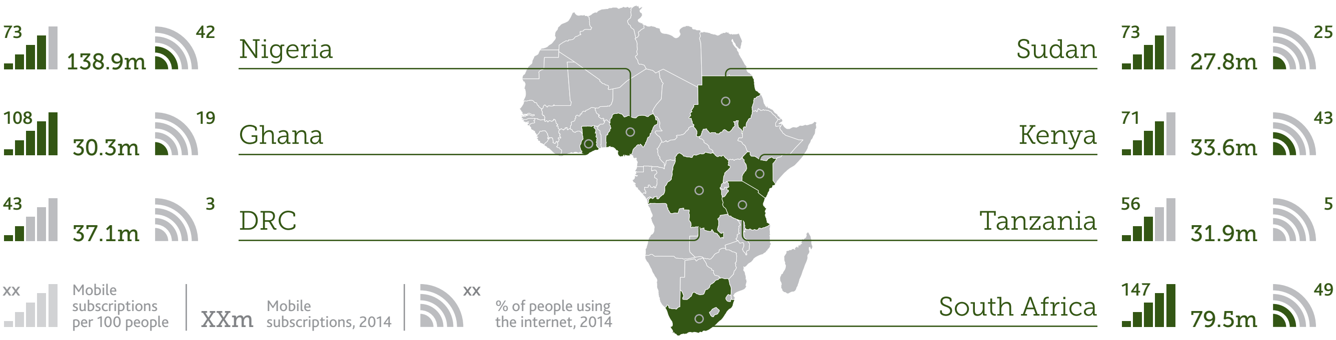
MIF, 2015

Internet access has grown substantially over the past decade...

Internet penetration in Africa 2005-16 (per 100 people)



...particularly in states with large numbers of mobile phone subscribers



Oxford Analytica, 2015

- Over the past 10 years, Africa has gone from having total bandwidth availability comparable to that of Norway to having almost 100 million internet users and 700 million mobile users.

EU, 2015

'Leap frogging'

- Between 2006 and 2013, the proportion of Kenyan adults having access to financial services more than doubled from 26.4% to 66.7%.

Active mobile money customers
12.5M

Mobile money transactions in volume
73.9M

Mobile money transactions in value
192.6BN

Muthiora, B. 2015

- In 2015, Tanzania launched a system which allows birth registration by mobile to a central database and a birth certificate free of charge.

Reuters, 2015

- Cyber security has become an issue in Africa with cyber crimes costing Kenya more than $22.6 million in 2013.

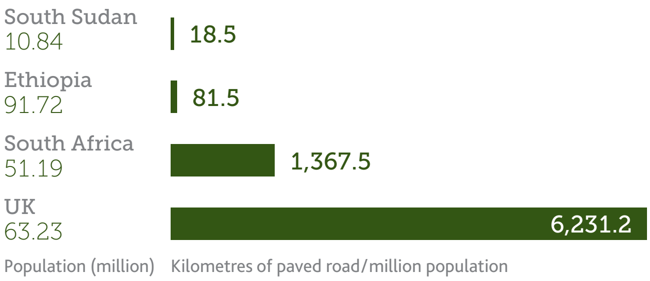
Gagliardone, I. & Sambuli, N. 2015

PHYSICAL INFRASTRUCTURE

Road

- Whilst 31 countries show improvement in the IIAG indicator *Road Network* since 2006, the existing road network in most African countries is sparse in relation to size and population.

State of Africa's streets



MIF, 2015; New Scientist, 2015

Rail

- Only 4 countries have shown improvement in the IIAG indicator *Rail Network* since 2006: Morocco, Cameroon, Kenya and Mali.
- Addis Ababa's 17km light rail opened in September 2015, carrying 60,000 passengers per day. When completed, the railway should carry 100,000 passengers per day.

MIF, 2014, 2015

Air

- Sub-Saharan Africa lags behind every other region in the world in terms of air freight volume, hosting only 1.5% of the global industry, whereas the East Asia & Pacific region hosts 35.7%.
- The volume of air passengers increased by over ¾ (77%) in the past 10 years, higher than the EU (25%) but lower than Latin America & the Caribbean (118%) and East Asia & Pacific (99%).

MIF, 2015

Electricity & energy

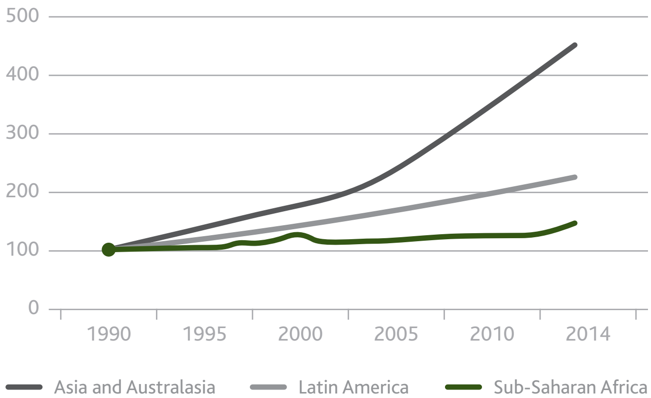
Electrification remains the key issue

- The electrification rate in Africa is 43%.
  - In sub-Saharan Africa it is just 32%.
- Access to modern energy is the lowest in the world: 622 million Africans do not have access to electricity.
- Per capita energy consumption for an average African citizen is only 560 kWh per capita, compared to 14,980 kWh per capita for an average US citizen.
- The whole of Africa generated only 629 TWh of energy in 2010 – roughly equal to the generation capacity of Canada or Germany.

Brookings, 2015; Ecobank, 2014; IEA, 2014; World Bank, 2015

Just emerging

Maximum electricity generating capacity (MW)



Sustainable Economic Opportunity

RURAL SECTOR

IIAG RESULTS SINCE 2006

Since 2006, the African average for *Rural Sector* has increased from 49.3 to 50.5 (+1.2). This is 1 of 8 (of 14) sub-categories to show improvement over this time period. 30 countries (out of 53, there is no data for Somalia) have shown an improvement since 2006, while 23 have deteriorated (including South Sudan and Sudan, showing deterioration since 2011).

MIF, 2015

LARGEST IMPROVEMENT
Sierra Leone: +24.2. From 30.3 to 54.4.

LARGEST DETERIORATION
Libya: -34.1. From 47.3 to 13.2.

+1.2 score points increase

30 countries have improved

50.5 African average

SPOTLIGHTS

AGRICULTURAL PRODUCTION

- 36 countries (out of 39 measured) have increased their agricultural production value since 2006.
- Algeria, the 3rd largest agricultural producer in Africa, has seen the largest increase in value by $14 million.
- 9 out of the top 10 agricultural producers in Africa have increased their agricultural production value.
- However, Nigeria, Africa's largest agricultural producer, has seen the largest decrease in value by $7 million.
- The top 10 agricultural producers in Africa have remained the same over the past 10 years.

Top 10 African agricultural producers (Gross Production Value, current million $)

Country	Agricultural production value (2013)
Nigeria	66,567
Egypt	30,732
Algeria	23,458
South Africa	20,886
Sudan	14,320
Morocco	14,242
Ethiopia	12,594
Kenya	10,963
Ghana	10,958
Côte d'Ivoire	9,195

FAO, 2015

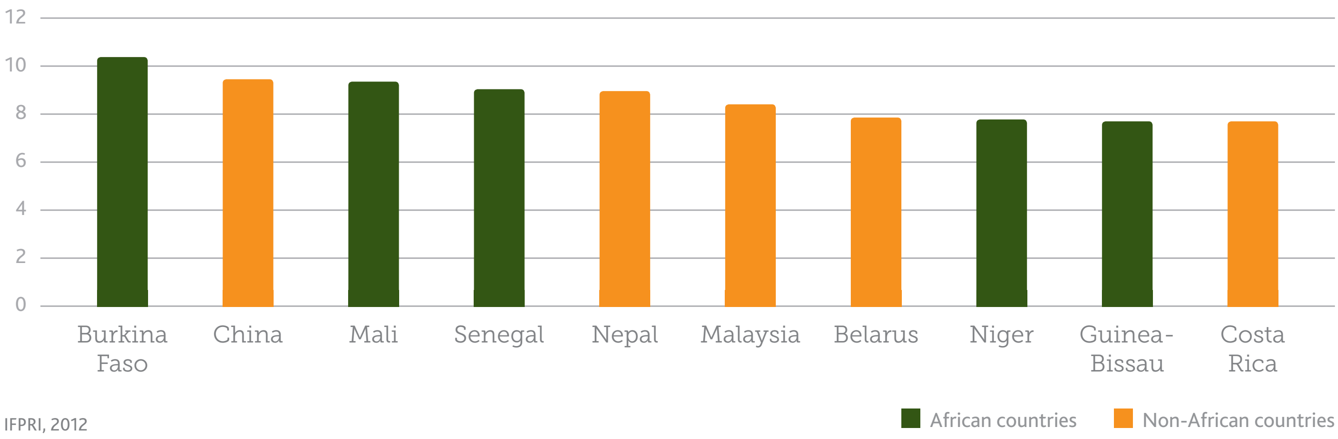
FOOD IMPORTS

- Over ⅔ of African countries remain net importers of agricultural products.
- This includes Africa's top 3 agricultural producers, Nigeria, Egypt, and Algeria.
- Only 15 countries are net exporters: Côte d'Ivoire, South Africa, Ethiopia, Kenya, Zambia, Malawi, Uganda, Ghana, Tanzania, Mali, Burkina Faso, Swaziland, Zimbabwe, Guinea-Bissau and Rwanda.

PUBLIC EXPENDITURE ON AGRICULTURE

- The proportion of public expenditure allocated to agriculture in Africa accounted for 4.8% on average in 2012 – below the 10% stated by the Maputo Declaration in 2003.
- The largest increases in agricultural expenditure since 2006 are in Togo, Kenya and Côte d'Ivoire.
- Niger has reduced its share of public expenditure on agriculture by 8.3%, the largest amount of any African country.
- 5 of the top 10 countries which spend the highest proportion of public expenditure on agriculture are African.
- Burkina Faso spends the highest proportion of public expenditure on agriculture globally – 10.4%.

Proportion of total public expenditure in agriculture – top 10 countries (%)



IFPRI, 2012

Access for rural populations to land and water is increasing

- *Land & Water for Low-income Rural Populations* is one of the IIAG indicators in *Rural Sector* to see the largest number of countries improve with 38 countries improving their score.
  - 9 countries see an improvement greater than +20.0 score points: Swaziland, Angola, Cabo Verde, Ethiopia, Sierra Leone, Mauritius, Liberia, Morocco and Seychelles.

MIF, 2015

Human Development

WELFARE

IIAG RESULTS SINCE 2006

Since 2006, the African average score for *Welfare* has increased by +2.2 score points, from 48.7 to 50.9. This is 1 of 8 (of 14) sub-categories to have improved over this time-period. 38 (out of 54) countries have improved over this time-period (Sudan included, showing improvement since 2011), and 16 have deteriorated (South Sudan included, showing deterioration since 2011).

MIF, 2015

LARGEST IMPROVEMENT
Rwanda: +20.6. From 58.6 to 79.2.

LARGEST DETERIORATION
Libya: -23.6. From 61.9 to 38.3.

+2.2 score points increase

38 countries have improved

50.9 African average

SPOTLIGHTS

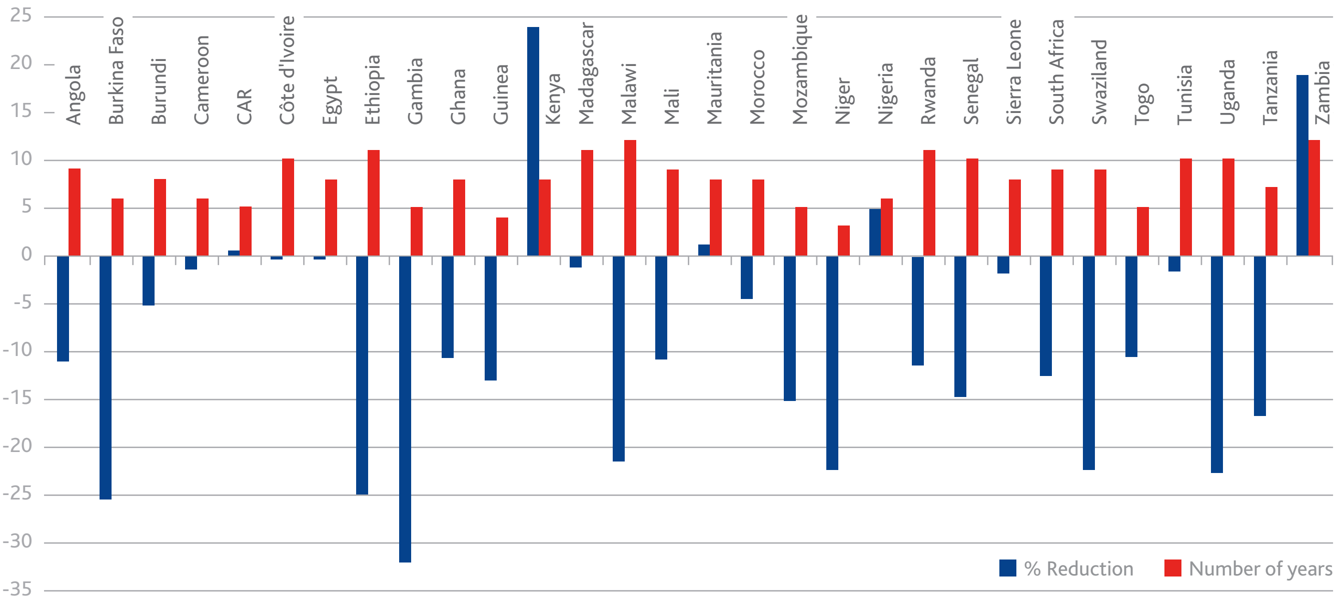
WELFARE RELATED MILLENIUM DEVELOPMENT GOALS (MDGs) RESULTS

- 2015 was a landmark year as the MDGs timeline came to a close. Goal 1 was to 'eradicate extreme poverty and hunger'.

'Reducing poverty':

- Poverty data challenges remain in Africa, and undermine efforts to measure the problem.
- However, organisations such as the AfDB continue to use the data that are available to monitor and assess poverty trends:
  - Africa, excluding North Africa, reduced poverty levels from 56.5% in 1990 to 48.4% in 2010, an 8% reduction, well below the 2015 MDG target of 28.25%.
  - The greatest reduction was in Gambia with a 32% reduction, followed by Burkina Faso, Niger, Swaziland, Ethiopia, Uganda and Malawi.
  - Poverty declined in 24 out of 30 African countries with available data, and increased in the remaining 6 countries.

Poverty reduction in 30 African countries, % reduction by number of years taken to achieve reduction



UNECA; AU; AfDB; UNDP, 2015

- By 2011, sub-Saharan Africa was the only developing region unable to meet the target of halving the proportion of people who live in extreme poverty.
- Sub-Saharan Africa's poverty rate did not fall below its 1990 level until after 2002.
- Even though the decline of poverty has accelerated in the past decade, the region continues to lag behind. More than 40% of the population in sub-Saharan Africa still lived in extreme poverty in 2015.

UN, 2015

'Creating employment':

- Africa's GDP growth has not been inclusive enough to provide decent job opportunities for the majority of the labour force. The employment to population ratio has declined on average from 57.7% in 2005 to 44.4% in 2012.
- Unemployment rates are in the double digits in some sub-regions but these are sometimes masked by high levels of informality.
    - Southern Africa had the highest unemployment rates in 2013 (21.6%), followed by North Africa (13.2%), Central Africa (8.5%), and East Africa (7.9%).
    - Youth and female unemployment are persistently higher than male unemployment rates in all regions. A lack of decent jobs leaves most in vulnerable employment in the informal sector.

UNECA; AU; AfDB; UNDP, 2015

Unemployment developments, 2007-2016 (%)

Country/ region	2007	2013	2014	2015	2016
European Union	7.2	10.9	10.2	9.9	9.7
Central & South-Eastern Europe & CIS	8.2	7.8	7.7	7.8	7.8
East Asia	3.8	4.5	4.6	4.8	4.9
South-East Asia & the Pacific	5.5	4.3	4.3	4.3	4.2
South Asia	4.0	3.9	3.9	3.9	4.0
Latin America & the Caribbean	6.9	6.3	6.6	6.8	6.9
Middle East	10.2	10.9	11.0	11.0	10.9
North Africa	11.4	12.4	12.5	12.5	12.5
Sub-Saharan Africa	7.8	7.7	7.7	7.7	7.7

ILO, 2015

'Combatting hunger':

- The overall net change in the proportion of persons whose food intake falls below the minimum level of dietary requirements in Africa between 2012 and 2013 was 0.
- Africa remains the most food-deficient of all regions in the world, with 25% of its population having faced hunger and malnutrition during 2011 to 2013.
- Persistent conflicts in Central Africa, health emergencies such as Ebola, and climate related events such as droughts and flooding in the Sahel, the Horn of Africa and Southern Africa continue to exert pressure on food security and nutrition.

UNECA; AU; AfDB; UNDP, 2015

Human Development

EDUCATION

IIAG RESULTS SINCE 2006

Since 2006, the African average for *Education* has increased by +6.1 score points, from 42.6 to 48.8. This is 1 of 8 (of 14) sub-category improvements over this time-period. 48 out of 54 countries have improved over this time-period (including Sudan, which has improved since 2011), whilst only 5 have deteriorated (including South Sudan, which has deteriorated between 2011 and 2013, the only years for which there are data). One country, Somalia, has remained static at the lowest possible score of 0.0.

MIF, 2015

LARGEST IMPROVEMENT
Ghana: +15.0. From 50.1 to 65.2.

LARGEST DETERIORATION
South Sudan: -38.9. From 38.9 (2011) to 0.0 (2013).

+6.1 score points increase

48 countries have improved

48.8 African average

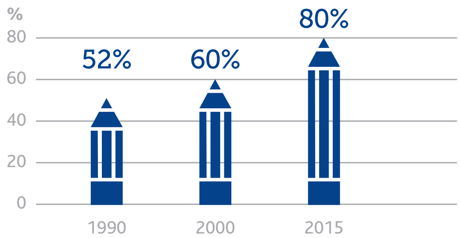
SPOTLIGHTS

EDUCATION RELATED MILLENIUM DEVELOPMENT GOALS (MDGs) RESULTS

- Goal 2: 'achieve universal primary school enrolment' (threshold 97%) is close to being reached in all regions except sub-Saharan Africa, where it is at 80%.
- However, sub-Saharan Africa has had the best record of improvement in primary school enrolment of any region since the MDGs were established. The region achieved a 20% increase in the net enrolment rate from 2000 to 2015.
  - Between 1990 and 2012, the number of children enrolled in primary school in sub-Saharan Africa more than doubled, from 62 to 149 million.

UN, 2015

Primary school net enrolment rate in sub-Saharan Africa



- The primary completion rate in Africa was 67% in 2015, with ⅓ of pupils who started grade 1 not being likely to reach the last grade of primary education.
- Increased enrolment has boosted literacy rates across the continent. In 2012, only Chad, Côte d'Ivoire and Niger recorded 15-24 literacy rates below 50%. Over 58.8% of African countries have achieved at least 75% youth literacy rates. Algeria, Botswana, Equatorial Guinea, Libya, South Africa, Swaziland and Tunisia have shown youth literacy rates above 95%.

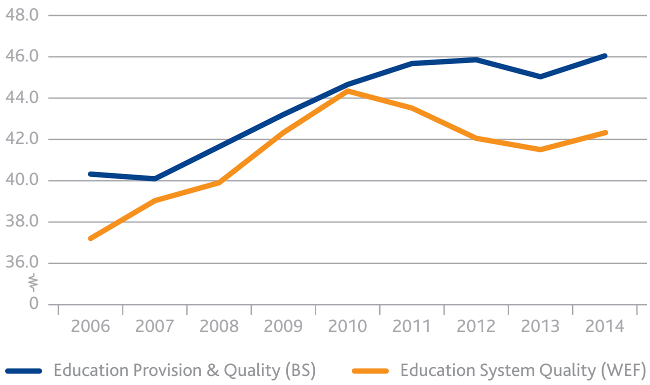
UNECA; AU; AfDB; UNDP, 2015

MATCHING EDUCATION & EMPLOYMENT PROSPECTS

- Although access to education in Africa is improving, the challenge is now to make that education applicable to the requirements of the economy.
  - Both IIAG indicators *Education Provision & Quality and Education System Quality* show improvement since 2006. However the latter indicator, which assesses how well the educational system meets the needs of a competitive economy, has shown deterioration since 2010.

MIF, 2015

2015 IIAG education quality indicators, 2006-2014



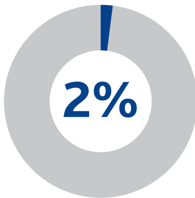
Skills do not meet the needs of the 21st century labour market

- The 'mismatch' of skills in Africa has been identified as crucially relevant.
- According to an African Economic Outlook (AEO) survey, the most difficult sectors for recruiters to find candidates are those that need specific technical qualifications, such as the extractive industries, logistics, the chemical and pharmaceutical industries, manufacturing in general and agri-business.
- With tertiary education focusing on public sector employment rather than private sector labour demands, universities do not educate for all African needs.

MIF, 2013, 2015

Agriculture contributes on average 25% of Africa's GDP, ranging from 2%-60% across different countries on the continent.

Less than



of youth in Africa are studying agriculture

Engineers have better employment opportunities & resource economies need skilled engineers.

Sub-Saharan Africa

has the lowest

share of engineering graduates in the world.

A GROWING SCHOOL AGE POPULATION

- Between 2015 and 2025, 62 million more school-age children are expected in sub-Saharan Africa.
- By 2025, the number of school-age children in sub-Saharan Africa will be almost 5 times larger than the number in North America and Western Europe combined.

UNDESA, 2015

- The pupil-teacher ratio ranges from 13.1 in Seychelles to 80.1 in Central African Republic.
- Over ⅓ of African countries have more than 40 pupils per teacher.

Pupil-teacher ratio in primary schools, 2014

Seychelles	13.1	South Africa	32.0	Tanzania	43.4
Tunisia	17.4	São Tomé & Príncipe	32.5	Benin	43.7
Mauritius	19.8	Lesotho	32.6	Cameroon	44.2
World	20.8	Djibouti	33.2	Guinea	44.2
Cabo Verde	22.9	Sierra Leone	34.8	Congo	44.4
Egypt	23.3	Mauritania	35.4	Burundi	44.8
Algeria	23.3	Zimbabwe	35.9	Uganda	45.6
Botswana	23.4	Gambia	36.1	Burkina Faso	46.1
Gabon	24.5	Niger	36.3	Zambia	47.9
Morocco	25.7	DRC	37.1	Guinea-Bissau	51.9
Equatorial Guinea	26.2	Nigeria	37.6	Ethiopia	53.7
Liberia	26.5	Madagascar	39.8	Mozambique	54.5
Comoros	27.8	Eritrea	40.3	Kenya	56.6
Swaziland	29.1	Côte d'Ivoire	41.0	Rwanda	59.8
Namibia	29.8	Mali	41.3	Chad	62.4
Ghana	30.1	Togo	41.3	Malawi	69.1
Senegal	31.6	Angola	42.5	CAR	80.1

UNESCO, 2015

Human Development

HEALTH

IIAG RESULTS SINCE 2006

Since 2006, the African average for *Health* has increased by +1.4 score points, from 68.5 to 69.9. This is 1 of 8 (out of 14) sub-category improvements over this time-period. 33 (out of 54) countries have improved over this time-period, whilst 21 have deteriorated (including South Sudan and Sudan, which have both deteriorated since 2011).

MIF, 2015

LARGEST IMPROVEMENT
Ethiopia: +19.6. From 50.5 to 70.1.

LARGEST DETERIORATION
Madagascar: -12.3. From 68.5 to 56.2.

+1.4 score points increase

33 countries have improved

69.9 African average

SPOTLIGHTS

HEALTH RELATED MILLENIUM DEVELOPMENT GOALS (MDGs) RESULTS

- Despite not meeting all targets, Africa has made substantial progress on Goal 4 (reduce child mortality), Goal 5 (improve maternal health) and Goal 6 (combat HIV/AIDS, malaria and other diseases).

Goal 4: Reduce child mortality

- In Africa the under-5 mortality rate reduced from 146 deaths per 1,000 live births in 1990 to 65 deaths in 2012, a 55% reduction against the target of a ⅔ reduction.
- In sub-Saharan Africa, the annual rate of reduction of under-5 mortality was over 5 times faster during 2005-2013 than it was during 1990-1995.
- The infant mortality rate fell from 90 deaths per 1,000 live births in 1990 to 54 deaths per 1,000 live births in 2014, an average decline of 40%.
- However, many African countries have demonstrated either slow progress or stagnating neonatal mortality rates. The situation is worse for the large rural populations that have less access to maternal health services.

UNECA; AU; AfDB; UNDP, 2015; UN, 2015

Goal 5: Improve maternal health

- Between 1990 and 2013, only 4 African countries reduced their maternal mortality rate by over 75.0%, thereby meeting a target to reduce rates by ¾: Equatorial Guinea, 81.9%; Eritrea, 77.6 %; Rwanda, 77.1% and Cabo Verde, 77.0%.
- By 2013, some countries had reduced their maternal mortality rate by over 60% and were on track to meet the target: Ethiopia, 70%; Angola, 67%; Mozambique, 63%; Egypt, 62.5%; and Morocco, 61.3%.
- Nevertheless, Africa still remains the region with the highest maternal mortality ratio compared to the rest of the world, registering 289 maternal deaths per 100,000 live births compared to the global average of 210 maternal deaths per 100,000 live births in 2013.
- Improvements are noticeable, despite these high numbers. In sub-Saharan Africa, the maternal mortality ratio declined by 49% between 1990 and 2013.

UNECA; AU; AfDB; UNDP, 2015; UN, 2015

Goal 6: Combat HIV/AIDS, malaria and other diseases

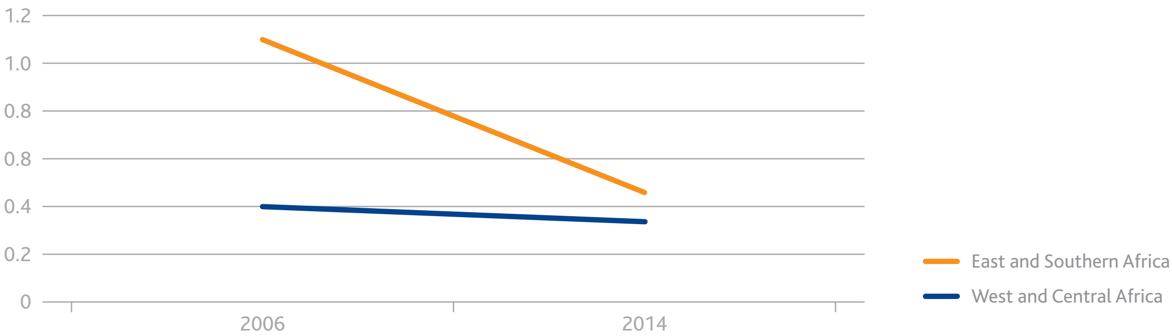
- Africa has made significant progress combatting diseases such as HIV/AIDS, malaria and tuberculosis, as well as providing immunisations for others such as measles and hepatitis B.
- Notwithstanding the progress being made, Africa accounts for more than ½ of all global cases and deaths of HIV/AIDS, malaria and tuberculosis.

UNECA; AU; AfDB; UNDP, 2015

HIV-AIDS: Africa shows the most progress of all regions of the world

- AIDS-related deaths have dropped in all sub-Saharan African regions.
- East and Southern Africa have seen a 58% drop in AIDS-related deaths, from 1.1 million in 2006 to 460,000 in 2014. This is the largest decrease of anywhere in the world over this time period. Eastern Europe and Central Asia actually show a 15% increase in AIDS-related deaths.

AIDS-related deaths, sub-Saharan African regions, 2006-2014 (millions)



UNAIDS, 2015

- Anti-Retroviral Treatment (ART) provision has increased dramatically since 2006. The 2015 IIAG indicator shows that the African average for *ART Provision* has risen by +18.4 score points since 2010 (where data are available).

MIF, 2015

Malaria: not every region shows progress

- Over 6.2 million malaria deaths were averted between 2000 and 2015, primarily in children under 5 years of age in sub-Saharan Africa.
- East and Southern Africa have improved their levels of malaria-related deaths by more than +15.0 score points each in the 2015 IIAG since 2006, while Central and West Africa have shown some slight deterioration.

MIF, 2015

EMERGING THREATS (Non-communicable diseases 'NCDs')

- Changing environmental factors – increased urbanisation, growing middle-class with changing lifestyles – are likely causes of the rise in lifestyle disorders, such as cardiovascular diseases, diabetes, hypertension, obesity, cancer and respiratory diseases.
- Projections indicate that by 2020, the largest increase in deaths from NCDs in the world will occur in Africa.
- In the next decade NCDs are projected to account for 46% of deaths in Africa.
- Deaths from NCDs are projected to exceed the combined deaths of communicable and nutritional diseases, and maternal and perinatal deaths, as the most common cause of death by 2030.
- By 2030 it is estimated that there will be 1.6 million new cancer cases in Africa per year.
- The number of diabetes patients is expected to rise from 12.1 million to 24.0 million by 2030.
- Mental and neurological conditions are a challenge, with about 80% of cases estimated to not receive any treatment. Alzheimer's and other forms of dementia are likely to increase as people live longer.
- A large proportion of donor funding has been focused on infectious diseases, to the detriment of NCDs.

MIF, 2013

In sub-Saharan Africa, only **38%** of pharmaceutical drugs are available in public facilities.

Most countries rely on imported medicines & the total size of Africa's pharmaceutical industry is less than 1% of global share.

ANNEX: Africa in 2016

POLITICAL LANDSCAPE

- **A "bumper year" for presidential elections**

Planned presidential and general elections, 2016			
Date	**Country**	**Type of election**	**Current Head of State**
14 February	CAR	Presidential	Interim President Catherine Samba-Panza
18 February	Uganda	Presidential	President Yoweri Museveni
21 February	Niger	Presidential	President Mohamadou Issoufou
21 February	Comoros	Presidential	President Ikililou Dhoinine
28 February	Benin	Presidential	President Boni Yayi
20/30 March	Congo	Presidential	President Denis Sassou-Nguesso
8 April	Djibouti	Presidential	President Ismail Omar Guelleh
10 April	Chad	Presidential	President Idriss Déby
1 July/ 1 August	São Tomé & Príncipe	Presidential	President Manuel Pinto da Costa
August	Gabon	Presidential	President Ali Bongo Ondimba
August	Cabo Verde	Presidential	President Jorge Carlos Fonseca
11 August	Zambia	Presidential	President Edgar Lungu
November	Equatorial Guinea	Presidential	President Obiang Nguema Mbasogo
7 November	Ghana	General/Presidential	President John Dramani Mahama
27 November	DRC	General/Presidential	President Joseph Kabila
December	Gambia	Presidential	President Yahya Jammeh

- **The "3rd term" debate will intensify.** (Africa Report/Africa Confidential/Africa Research Institute)
  - Concerns have been raised that President Joseph Kabila in **DRC** may attempt to extend his term or amend the constitution to allow him to run for a 3rd term. Last year, the government declared that elections could be delayed by up to 4 years due to the necessity of updating electoral rolls and changing provincial borders. (*Brookings Institution/Bloomberg /Jeune Afrique/ The Africa Report*)
  - The referendum in **Congo** last year has paved the way for President Denis Sassou Nguesso to extend his tenure via elections[1]. (*Africa Research Institute/Jeune Afrique/The Africa Report*)
  - **Gambia's** President Yahya Jammeh is likely to seek another 5-year term in December. (*BBC*)
- 2016 is likely to be a **"year of opposition and protests"** as new forms of media and civil society organisations will form a more robust opposition. (*Royal African Society*)
- At the continental level, **elections for the African Union Commissions' Chairperson** will take place to determine who will lead the AU's secretariat for the next 4 years. The incumbent Chairperson Nkosazana Dlamini-Zuma has yet to declare her intention to stand for the position again. (*Brookings Institution*)
- In **Benin**, President Boni Yayi has resolved to step down when he completes his 2nd term in February. (*Africa Research Institute/The Africa Report*)
- Elections in **Chad, Djibouti** and **Niger** are predicted to return the incumbent leaders. (*Africa Confidential/ The Africa Report /Royal African Society*)
- In **Ghana**, Nana Afuku-Addo will hope to present himself as an alternative to President John Mahama in elections at the end of the year. (*Africa Confidential/The Africa Report*)
- It will be a challenging year for **Nigeria**, as President Muhammadu Buhari will have to make good on his election promises by dealing with Boko Haram, bringing back the kidnapped Chibok girls, fighting corruption and boosting economic development despite falling commodity prices. (*ISS Africa/Daily Maverick*)

[1] The referendum in Rwanda last year also permitted President Paul Kagame to extend his term in office, with elections to be held in 2017.

- Elections by direct suffrage in **Somalia** will be unlikely to take place, given rising political tensions between regional powers and central government. (*Africa Confidential*)
- In **South Africa**, the ANC risks losing control of important metropolitan authorities in municipal elections, with the campaign to succeed President Jacob Zuma likely to dominate the political narrative. (*Africa Research Institute/The Economist/Africa Confidential/Royal African Society*)
- In February, **Uganda** held presidential and parliamentary elections, with the outcome either reinforcing incumbent President Yoweri Museveni's 30 year rule. (*Brookings Institution/Daily Maverick/Africa Research Institute/The Economist/The Africa Report*)
- In **Zambia**, President Edgar Lungu will face a tough election campaign due to the closure of copper mines and the resulting reduction in government revenue. (*The Africa Report*)
- **Zimbabwe** has the potential to become unstable, as citizens become increasingly unhappy with President Robert Mugabe and the ruling Zanu-PF. (*ISS Africa*)

ECONOMIC LANDSCAPE

GDP growth (% change)	2015	2016 projections
Sub-Saharan Africa	3.5	4.0
Middle East & North Africa	2.5	3.6
Euro Area	1.5	1.7

Source: IMF World Economic Outlook, 2016 Update

- **Gradual pickup in growth expected**
  - **Growth on the continent is projected to rebound** to reach 4.0% in 2016. (*IMF*)
  - In 2016, some African countries such as **Côte d'Ivoire**, **Ethiopia**, **Mozambique**, **Rwanda** and **Tanzania** will be among the fastest-growing economies in the world. (*Brookings Institution*)
  - Most countries in sub-Saharan Africa will see gradual growth, but to **rates that are lower than seen over the past decade**. This mainly reflects the continued adjustment to lower commodity prices and higher borrowing costs. (*IMF*)
  - Low-income countries may register relatively high growth, supported by large-scale infrastructure investment and resilient consumer spending. (*World Bank*)
  - In **North Africa**, growth is expected to increase to 4.1% in 2016, supported by the gradual recovery of export markets and improved security. (*UNDESA*)

- **Falling commodity prices should drive diversification in resource-rich countries**
  - Resource-rich economies such as **Angola**, **Nigeria**, **Ghana** and **Zambia** face a serious threat from falling commodity prices as the **commodity super-cycle comes to an end**. (*Africa Progress Panel/Brookings Institution*)
    - **Zambia** and **Ghana** are likely to either cut spending or take measures to dramatically improve domestic revenue collection. (*Africa Research Institute*)
    - The IMF may revert to supervising austerity measures, with **bailouts possible in Zambia and Kenya**. (*Africa Research Institute/Mail & Guardian Africa*)
  - Falling commodity prices may offer some African countries the opportunity to diversify their economies and **cut fuel subsidies** that have exacerbated inequality. (*Africa Progress Panel/Africa Research Institute*)
  - **Agriculture** may start to be seen as an "exciting business commodity". (*Africa Progress Panel*)

- **"Risks remain tilted to the downside"** (*World Bank*)
  - Internal risks include **political uncertainty** associated with upcoming elections and the Boko Haram insurgency. **Power shortages** could have an impact. (*World Bank*)
  - External risks include the possibilities of a **further drop in commodity prices**, a faster than expected **slowdown in China**, and a **decline in capital flows** as the USA monetises monetary policy. (*World Bank*)

- **Investment and financial outlook: foreign investment predicted to slow, while debt repayments cause concern**
  - Countries that in recent years issued **sovereign bonds** in the commercial debt markets, including **Kenya**, **Zambia**, **Côte d'Ivoire** and **Nigeria**, may struggle to service their debt repayments as a result of the fall in commodity prices. (*Africa Report/Mail & Guardian Africa*)
    - It has been predicted that a strengthened dollar could cost sub-Saharan Africa an extra $10 billion. (*The Africa Report*)
  - A shift in international focus will see **investors turning away from emerging markets** amid planned interest rate rises in the USA. (*The Africa Report*)
  - Africa will have to compete for its share of direct investment from China through infrastructure investment, improvements in the investment climate and the strengthening of human capital. (*Brookings Institution*)
  - Big finance will move to tap the potential of the 80% of citizens excluded from the financial system. **Mobile technology** will be pivotal, and local banks will begin to function more as "real" banks serving the demands of small and medium-sized enterprises. (*Africa Progress Panel*)
  - **Pension funds** will be increasingly seen as an essential means to provide long-term capital. (*Africa Progress Panel*)
  - **The New Development Bank**, established by the BRICS countries, is expected to provide its 1st loan in 2016. (*Brookings Institution*)

CROSS-CUTTING ISSUES

- **Security issues will continue across the continent**
  - Prospects for peace in **Burundi** in 2016 seem unlikely, as escalating violence in the country raises fears of a return to conflict after a decade of relative peace. (*International Crisis Group*)
    - The situation threatens to further destabilise the fragile **Great Lakes region**, with increasing numbers of refugees from Burundi predicted to flee to neighbouring countries. (*International Crisis Group*)
  - In **Nigeria**, despite an announcement in late 2015 that the government had technically won the war against Boko Haram, the threat remains. (*Africa Research Institute/International Crisis Group*)
    - The renegotiation of the Niger Delta amnesty and agitation by Biafran separatists illustrate the security challenges facing the government. (*Africa Confidential*)
  - "**Lawlessness will continue to take a heavy toll on Libya**", which risks becoming "the Syria of North Africa". (*International Crisis Group/Royal African Society/The Africa Report*)
  - **South Sudan** risks descending into full-blown civil war, with the peace agreement "on the brink of collapse" and independent armed groups proliferating. (*International Crisis Group*)
  - The UN, in partnership with France, "should hold the ring" in **Central African Republic**, where Muslim-Christian animosity will remain high. (*The Economist*)
  - Electoral competition in **Kenya** could escalate into ethnic violence at the end of the year, as the election date of August 2017 nears. This is a less important security threat than **cross-border attacks by al-Shabaab** and terrorist operations in the big cities. (*Africa Confidential*)
  - **China** is expected to expand its military reach into Africa; it has confirmed that it will set up a **military base in Djibouti** this year, and may attempt to do the same in **Namibia**. (*Mail & Guardian Africa*)

- **Moving forward on climate change commitments**
  - 2016 is predicted to see Africa making advances in **low-carbon energy** while defending its right to exploit fossil fuels. With the cost of solar energy falling rapidly, by over 10% each year, huge opportunities exist. (*Africa Progress Panel*)
  - "The private sector will emerge as a critical catalyst for achieving global climate targets", with 2016 seeing more CEOs demanding a carbon price. (*Africa Progress Panel*)

- **Unpredictable weather patterns will impact food security and migration**
  - The effects from **El Niño** are projected to continue through March 2016, supressing rainfall in Southern Africa and resulting in above-average rainfall in the Horn of Africa. (*Brookings Institution*)
    - UNICEF estimates that 11 million children in East and Southern Africa are at risk of hunger and disease due to El Niño.

- **Food insecurity** and the necessity for effective institutions for early intervention will be key issues as unpredictable weather patterns impact agricultural productivity in vulnerable regions. (*Chatham House*)
- **Drought is also likely to fuel migration** into Europe from the Sahel and Horn of Africa. (*Mail & Guardian Africa*)
- Some African leaders will begin to tackle the underlying forces driving migration. At the same time, the global dialogue related to the movement of people from Africa to Europe may "start to shift from being seen as a crisis to a potential advantage if managed more proactively". (*Africa Progress Panel*)

- **New infrastructure and energy projects**
  - **Urban transport**: the 1st light rail system in Lagos will be operational by December 2016, and Dar es Salaam's bus rapid transport (BRT) system is expected to launch in the 1st quarter of 2016. (*Africa Research Institute*)
  - **The world's first civilian cargo drone station** is set to open in Rwanda in 2016, helping to overcome infrastructure challenges. (*The Africa Report/Africa Research Institute*)
  - Greater global and regional political engagement on Africa's energy access is expected, with the **African Development Bank's New Deal on Energy for Africa** encouraging a broad coalition to achieve quick wins in the next 5 years. (*Africa Progress Panel*)

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CHATHAM HOUSE: 2016 AFRICA PROGRAMME

2016 has the potential to be **a year of major change** for sub-Saharan Africa. **National elections** are scheduled in Benin, Cabo Verde, Chad, the Comoros, the Republic of the Congo, the Democratic Republic of the Congo, Djibouti, Gabon, the Gambia, Ghana, Niger, São Tomé and Príncipe, Somalia, Uganda and Zambia, as well as pivotal local elections in South Africa.

Food insecurity and the necessity for effective institutions for early intervention will be key issues as unpredictable weather patterns impact agricultural productivity in vulnerable regions. Enduring low **commodity prices** will challenge many countries' recent impressive economic growth rates. As societies start to feel the effects of **currency devaluations and constrained budgets**, policy-makers will have tough choices ahead as multiple urgent demands and long-term planning pressures compete for attention and resources.

Yet the continent's long-term prospects remain strong. **Progress in governance, institution-building and democratic consolidation in many countries is moving them towards improved resilience. Technological innovation, local private sector-led initiatives and wider participation** present the potential for positive change.

West Africa

In 2016, Africa Programme activities include a project focused on governance for infrastructure development in Ghana and Côte d'Ivoire, with particular emphasis on local participation and perspectives. The Africa Programme will track developments in Guinea, Liberia and Sierra Leone as efforts towards recovery and development will seek to assess and address the consequences of the Ebola outbreak. Programme work will also consider prospects for security and stability in Mali and a forthcoming publication will assess the **regional roles of Chad and Niger** grounded in an analysis of their domestic dynamics. The Africa Programme's extensive coverage of Nigeria will continue. Expert analysis and a series of events in London and in Nigerian cities will examine **Nigeria's shifting political**, **security and socioeconomic prospects**, as it contends with low oil prices, pressure to devalue the naira, the violent insurgency in the north east and restiveness in the Niger Delta region. A new project will explore **policy options to strengthen the link between institutional anticorruption efforts and social and collective influences and activities**. The Africa Programme provides administrative and research support to the UK's All Party Parliamentary Group (APPG) on Nigeria.

Horn of Africa

Our Horn of Africa Project will analyse shifting regional relations through the interplay of conflict, diplomacy, integration and competition. A research project will explore the **emerging interests and relations between countries in the Horn of Africa and its neighbouring states in the Arab world**. In collaboration with the British Council's Horn of Africa Leadership and Learning for Action (HOLLA) Project, the Africa Programme will host events in Juba, Addis Ababa and London focused on **youth policy in the Horn of Africa** and addressing the importance of youth engagement in peace and reconciliation.

Research on reconciliation in South Sudan in 2016 will take place at a crucial time following the 2015 peace agreement. Our coverage of Somalia will continue with a series of events and analysis of the 2016 elections, federal institution building, and security and resources. Programme activities will also examine **national and regional policies on migration from the Horn of Africa and maritime crime.**

East Africa

Competing national priorities will impact on East African states' ambitions for **regional integration**, a key focus of our work on the region in 2016. Events and research will assess the **East African Community's role and capability in balancing economic interests with peace and security** concerns, as violence in Burundi continues. A forthcoming research paper will discuss **governance challenges ahead for Tanzania** and assess it prospects. Events and research on **Kenya** will evaluate the **progress of devolution**, outcomes of economic growth and security dynamics as the country approaches elections in 2017. An Africa Programme project on governance for infrastructure development will incorporate analysis of the involvement of Tanzanian businesses in the country's development

Central Africa and Great Lakes

The Africa Programme will assess key challenges for the **Democratic Republic of the Congo** (DRC) in 2016 as it approaches crucial elections, the build up to which is fraught with the practical challenges of the process, splits and suspicions in government and parties, and cognizance of the regional ramifications of events in the DRC. The Programme will examine **policy options on Burundi**, as the country's political crisis and related violence continues. Elections in Uganda and the country's prospects beyond, as well as the implications of President Paul Kagame running for a third term as Rwanda prepares for elections in 2017 will be important features of Africa Programme work in the coming months.

Southern Africa

Africa Programme research on southern Africa in 2016 will incorporate analysis of the **impact of and policy responses to energy and water crises in the region, the management of change within the region's political parties and the diversification of economic and political relationships of southern African states**.

Our project on infrastructure development will examine local perspectives on governance for infrastructure in Angola and Mozambique. In 2016, events focused on the municipal elections in South Africa will complement research on local government in southern Africa. The **Angola** project will assess **priorities and challenges ahead of presidential elections in 2017**, with a focus on the impact of the low commodity price cycle and the potential of diversification. Research on Angola will focus on bilateral trade and financial regulations, democratisation and civil society. Our annual Angola Forum conference will take place in the second half of 2016. The Africa Programme provides administrative and research support to the All Party parliamentary Group (APPG) on Angola.

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THE DEMOGRAPHIC LANDSCAPE

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RULE OF LAW

IIAG Results Since 2006

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Gender

In 2015, 3 of the 18 female Heads of State in the world were in Africa.

The reported prevalence of physical violence against women is highest in Africa, with almost all countries reporting lifetime prevalence of over 40%.

Public Management

Over the past 10 years, Africa has an average 4.4% economic growth.

Commodity prices have fallen by over ¼ since 2006, with crude oil falling by 52%.

Cocoa has seen the largest increase in commodity price since 2006, increasing in value by 87%.

Business Environment

Since 2006, Foreign Direct Investment (FDI) to Africa has increased from $36 billion to $58 billion.

The stock of outstanding sovereign bonds in sub-Saharan Africa grew from less than $1 billion in 2008 to over $18 billion by 2014.

Infrastructure

Infrastructure is the 2nd highest IIAG sub-category improvement since 2006.

Addis Ababa's 17 km light rail opened in September 2015, carrying 60,000 passengers per day.

622 million Africans do not have access to electricity.

Rural Sector

Over ⅔ of African countries remain net importers of agricultural products.

Welfare

More than 40% of the population in sub-Saharan Africa still lived in extreme poverty in 2015.

Africa remains the most food-deficient of all regions in the world, with 25% of its population having faced hunger & malnutrition during 2011 to 2013.

Education

By 2025, the number of school-age children in sub-Saharan Africa will be almost 5 times larger than the number in North America & Western Europe combined.

Health

The under-5 mortality rate on the continent was reduced by 45% between 1990 & 2012, from 146 to 65 deaths per 1,000 live births.

Africa accounts for more than ½ of all global cases & deaths of HIV/AIDS, malaria & tuberculosis.