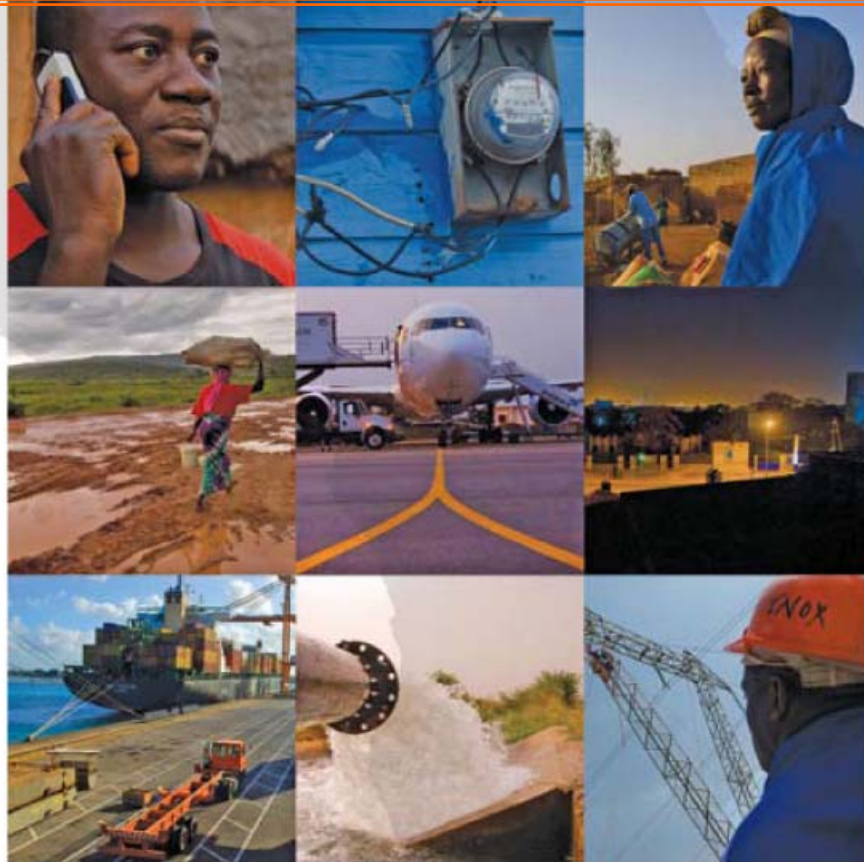


Africa's Infrastructure:

A Time for Transformation



Cecilia Briceño-Garmendia & Vivien Foster
World Bank

Africa Infrastructure Country Diagnostic: a multi-stakeholder effort



Key Message #1

**Infrastructure critical
to growth, but
continent hampered by
limited stocks and high
costs**

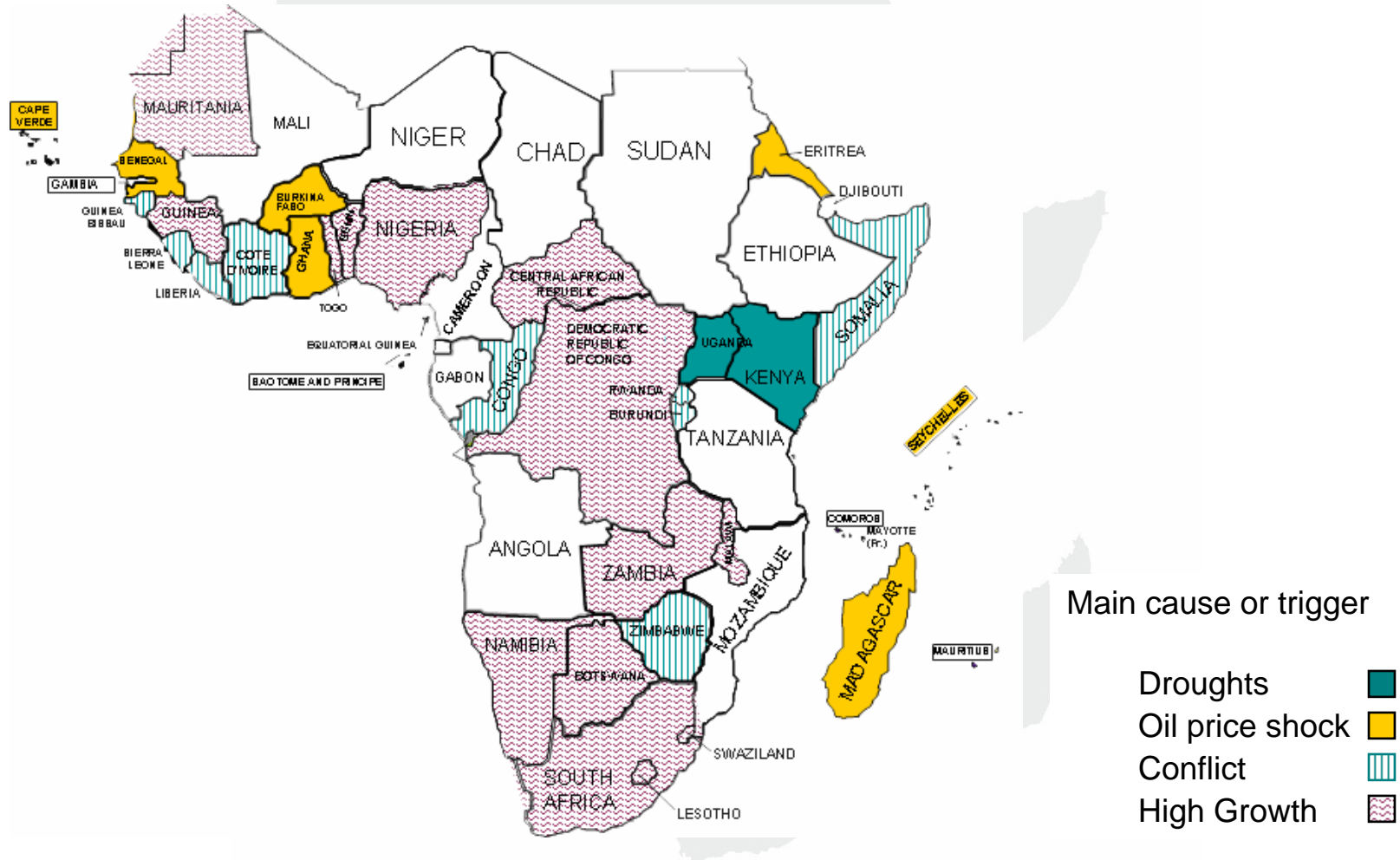
Infrastructure critical to Africa's past and future growth performance

- Of the increase in SSA's per capita growth rates between 1990s vs. 2000s
 - Infrastructure contributed 99 basis points
 - Structural policies contributed 68 basis points
- Infrastructure effect
 - Comes almost entirely from the ICT revolution
 - Inadequate power supply is dragging growth
- Raising all countries to level of Mauritius could add 2.2 percentage points to per capita growth

Key Message #2

**Power is by far Africa's
greatest infrastructure
challenge**

More than 30 countries face power crisis triggered by various causes



Source: Preliminary results AICD 2008

Key Message #3

**Cost of catching-up high,
existing flows cover much
ground and much to gain
from efficiency**

22 bn to bridge the gap... if efficiencies captured & existing investment flows sustained

US\$bn pa	Cost of Catching-up	Spending	Relevant Financing Gaps	Resources captured by inefficiencies	Additional Funding Needed
Power	42.6	(13.8)	28.8		
WSS	10	(5.9)	4.1		
Transport	20.3	(17.7)	2.6		
ICT	1.9	(10.0)			
Irrigation	4.9		4.9		
Better allocation of public funds				8	
Operational Inefficiencies				3.4	
Under-pricing				4	
Under-execution				3.3	
Total	79.7	(47.4)	40.4	18.7	21.7

Some sensible targets for catching-up

	Economic target	Social target
ICT	Complete network of submarine cables, and fiber optic backbone linking capitals	Extend GSM voice signal and public access broadband to 100% of the rural population
Irrigation	Develop all financially viable opportunities for large and small scale irrigation	Na.
Power	Attain demand-supply balance in power production within a regional framework	Raise household electrification rate from current average level of 24% to 35%
Transport	Attain good quality road networks supporting regional and national connectivity goals	Raise the Rural Accessibility Index from current level of 34% to 75% Place entire urban population within 500 meters of a road supporting motorized access
WSS	Na.	Meet the Millenium Development Goals for water and sanitation

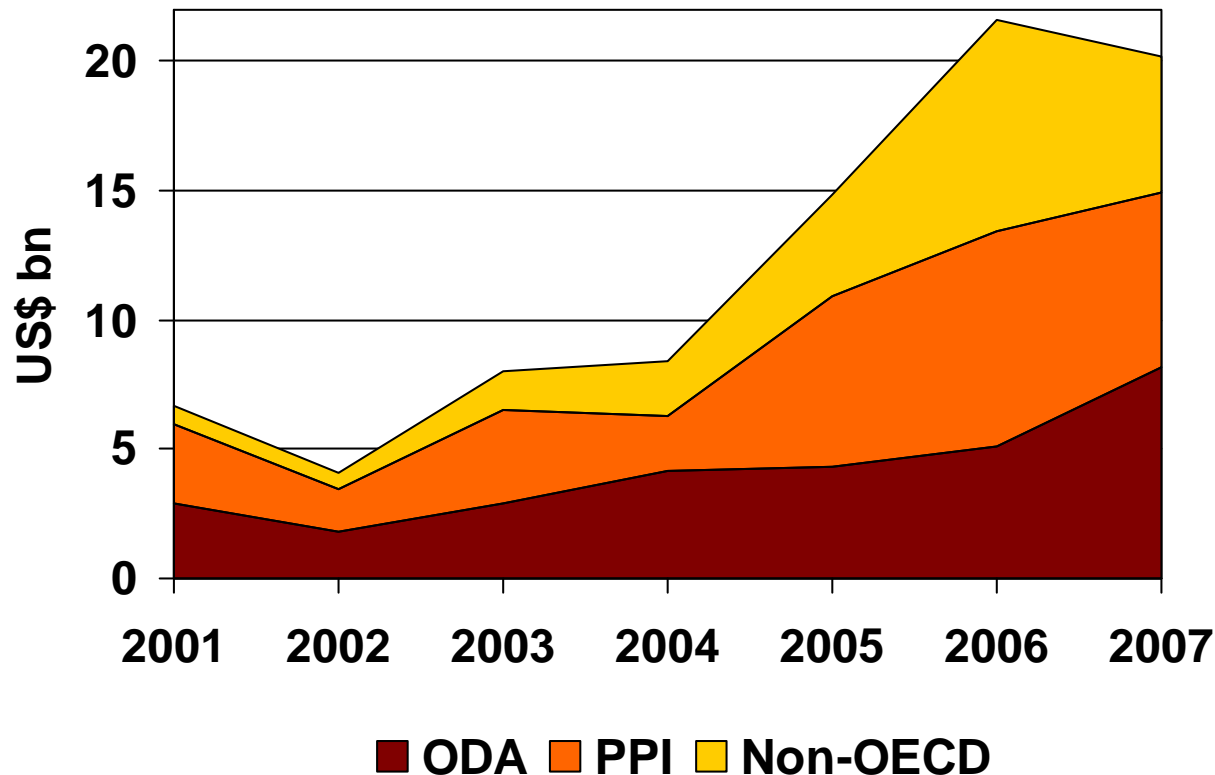


Overall price tag of sensible targets US\$80 bn, split evenly between investment & maintenance

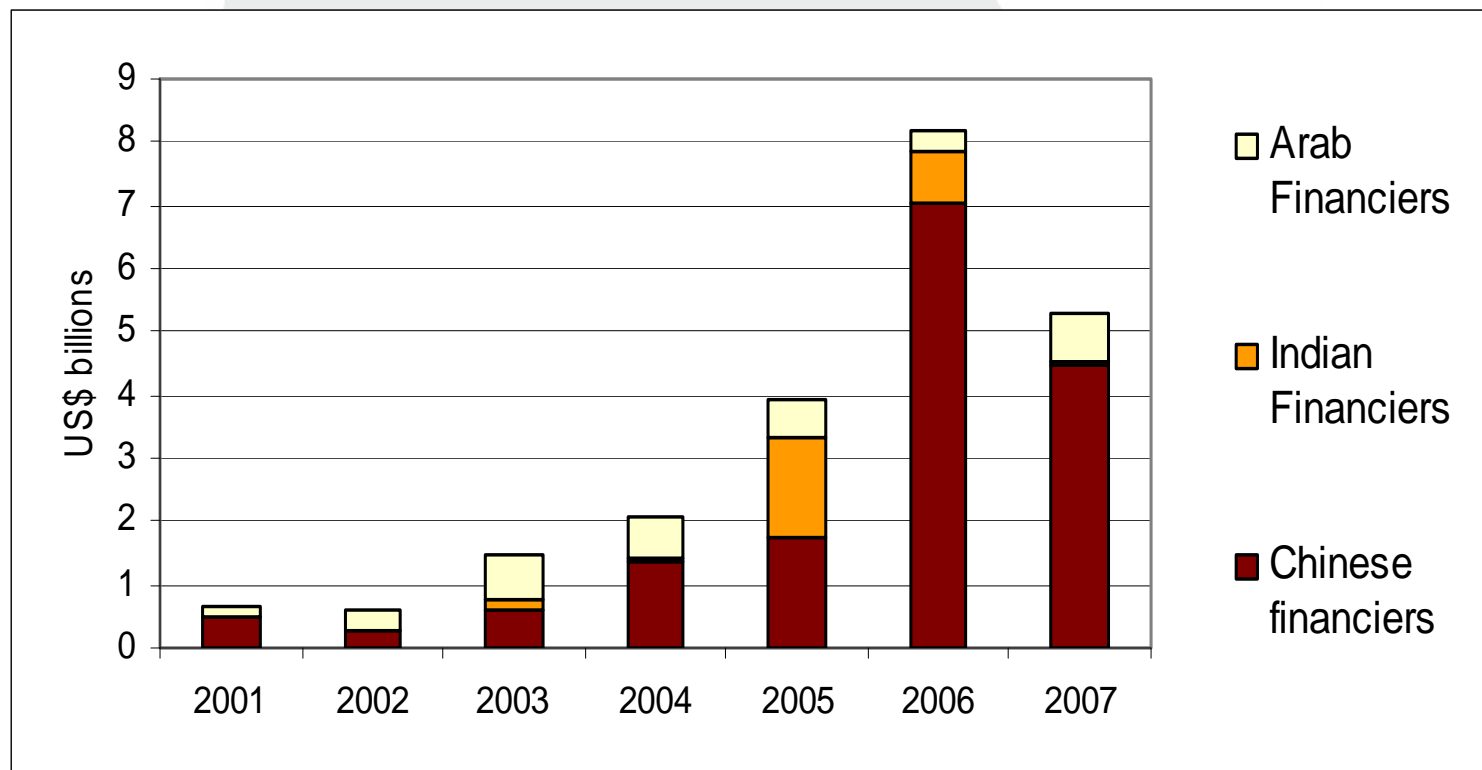
US\$bn. pa over 10 years	Capital expenditure	Operating expenditure	Total
ICT	0.8	1.1	1.9
Irrigation	4.1	0.8	4.9
Power	23.2	19.4	42.6
Transport	10.7	9.6	20.3
WSS	2.7	7.3	10.0
Total	41.5	38.2	79.7

Source: Preliminary results AICD 2008

External Finance for African Infrastructure Grows from \$5b to \$20b



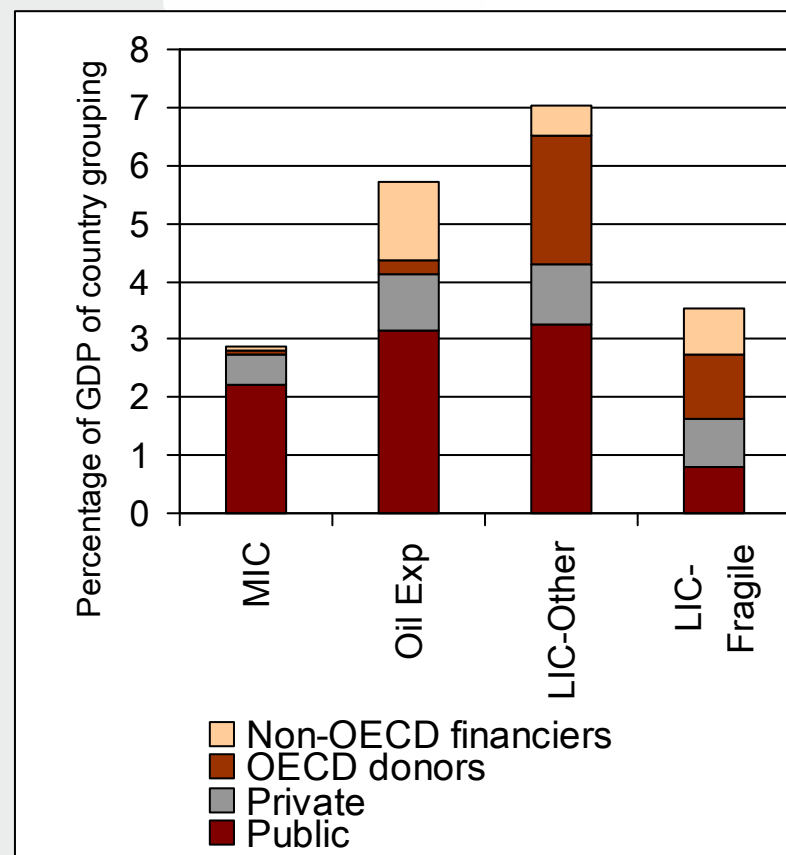
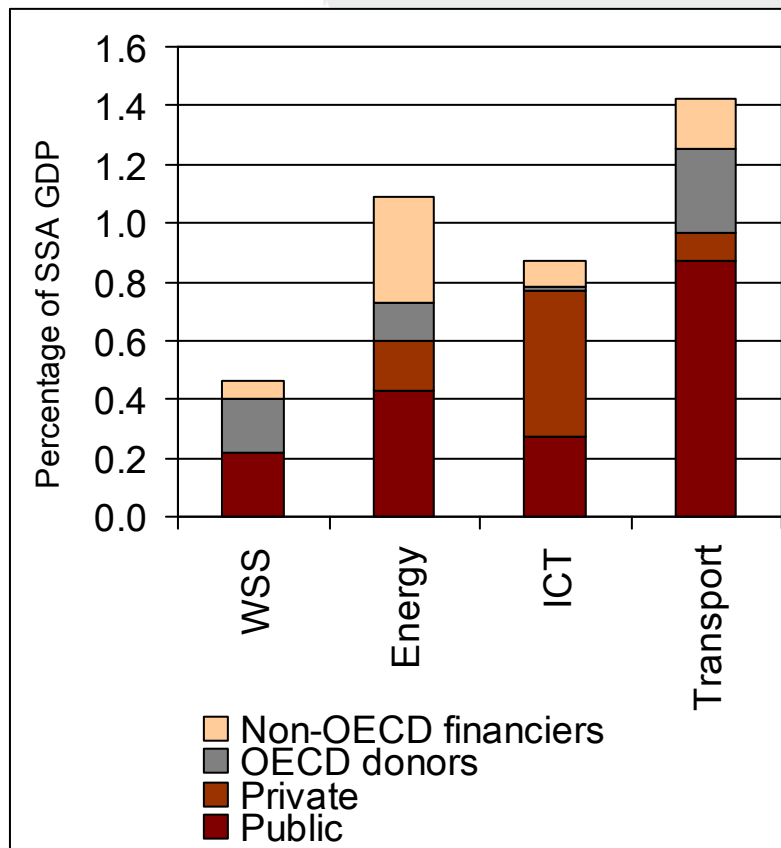
Non-OECD funding peaks at \$8billion in 2006



Source: *Building Bridges*, 2008



Evident patterns of concentration according to source of investment finance



Source: Preliminary results AICD 2008

Key Message #4

**Despite high spending
large financing gap
remains, mainly in power**

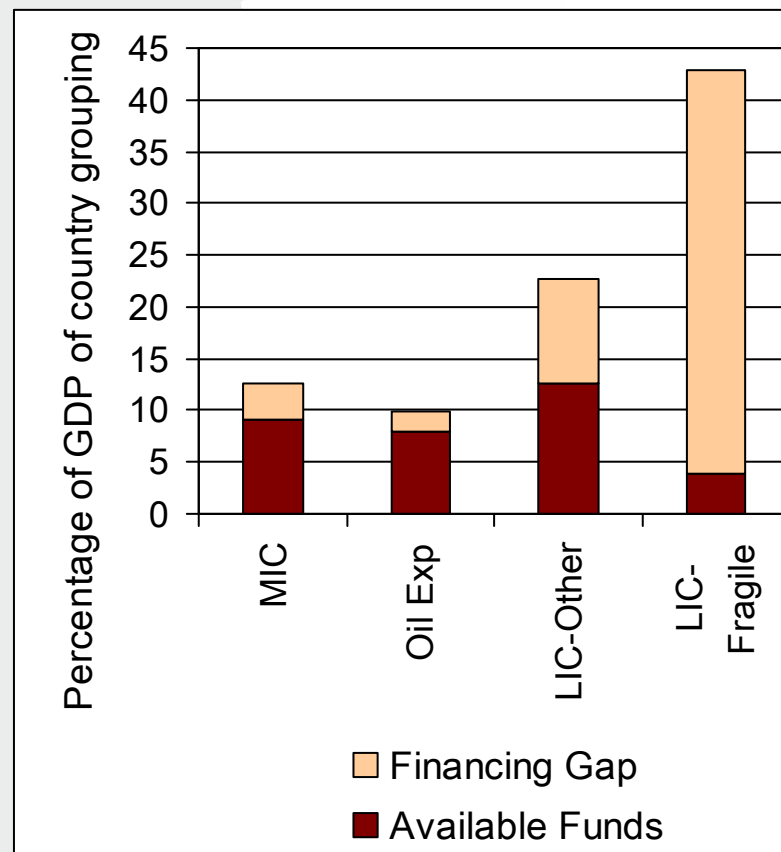
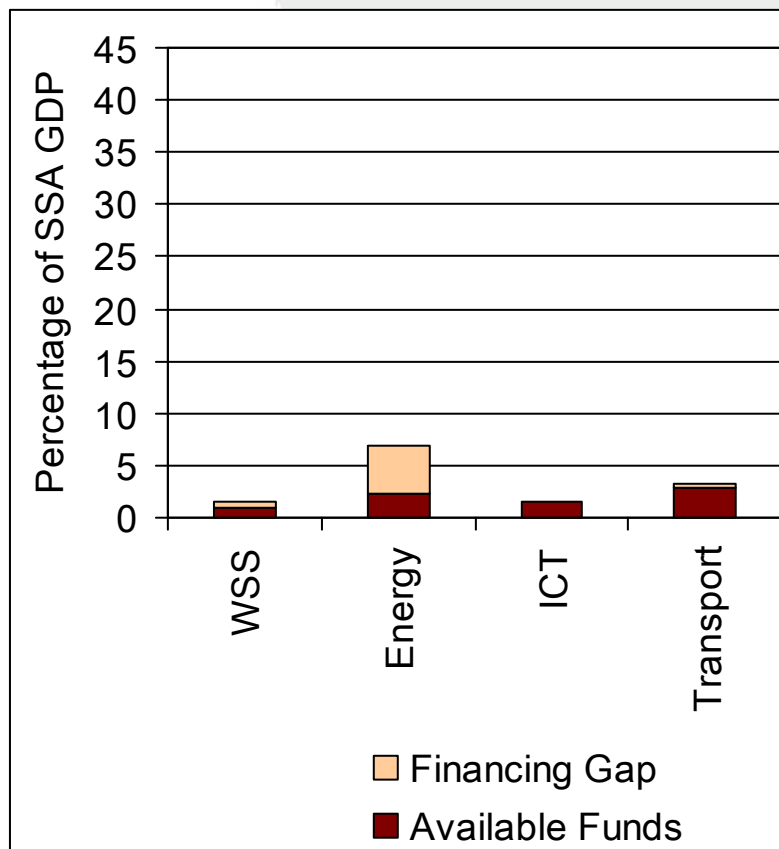
Overall financing gap of US\$40 billion per year concentrated largely in power

US\$bn pa	Needs	Spending	Cost of targets minus On-going spending	Relevant Financing Gaps
Power	42.6	13.8	28.8	28.8
WSS	10	5.9	4.1	4.1
Transport	20.3	17.7	2.6	2.6
ICT	1.9	10	-8.1	0.10
Irrigation	4.9	0	4.9	4.9
Total	79.7			40.4

Key Message #5

**Fragile states face
biggest infrastructure
challenge vis-a-vis
their economies**

Fragile states face largest gaps relative to GDP, particularly in transport and energy

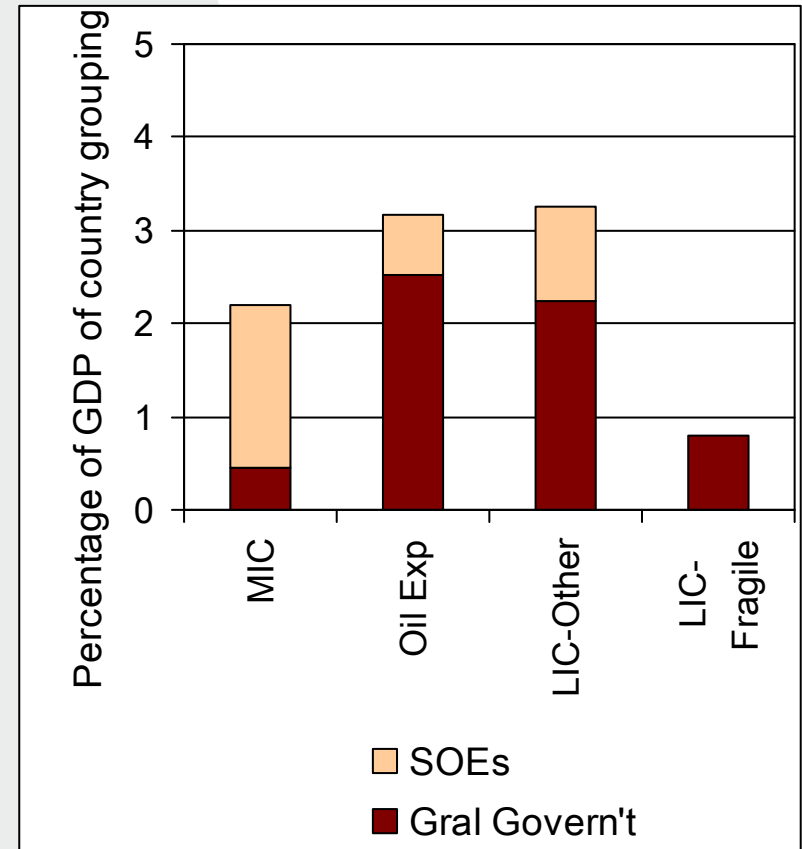
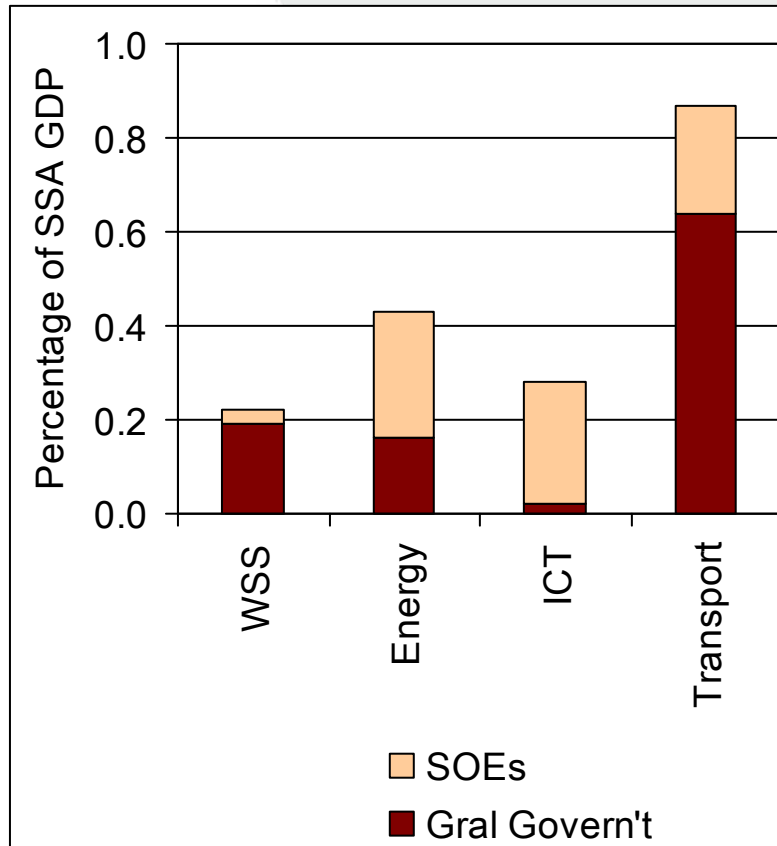


Source: Preliminary results AICD 2008

Key Message #6

**Public investment channeled
through central government
and subject to major flaws**

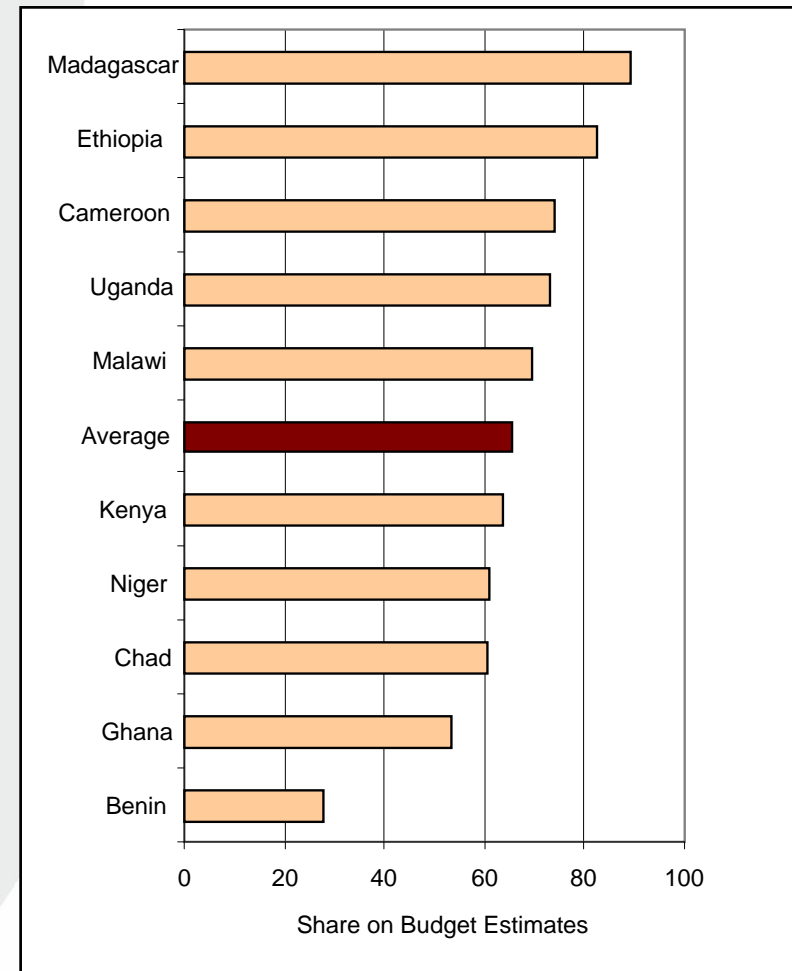
About 3-4% of GDP is public investment primarily executed by central government



Source: Preliminary results AICD 2008

Around a third of budgeted capital allocation for infrastructure goes unspent

- Potential gain of US\$3.3 bn pa from raising capital budget execution ratios
- Key problems are poor planning, project selection, tardy project preparation, inefficient procurement, annual budgeting

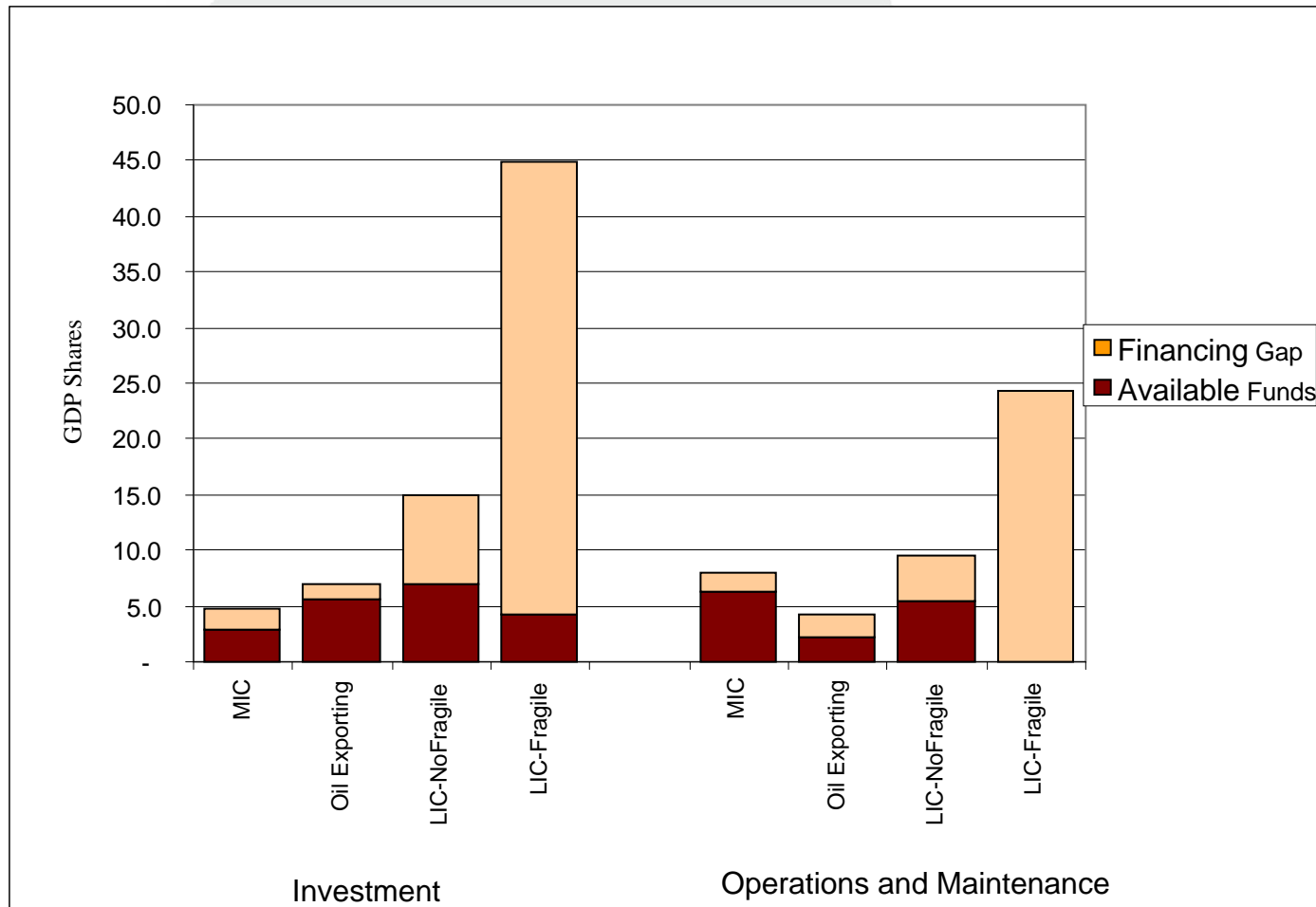


Source: Preliminary results AICD 2008

Key Message #7

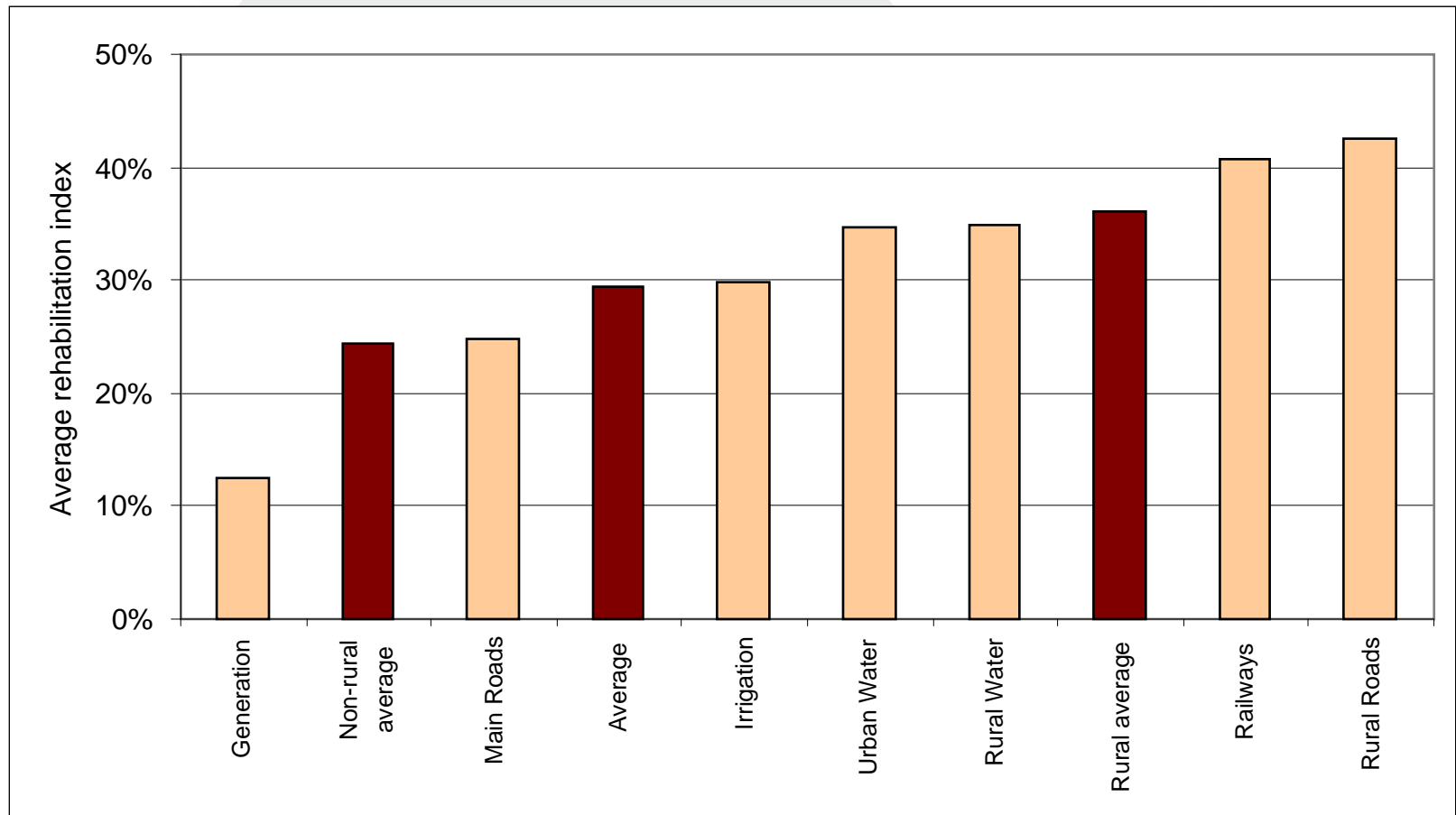
**Maintenance spending
is vital, but remains
seriously under-funded**

Financing gaps are not only about investment, but also maintenance



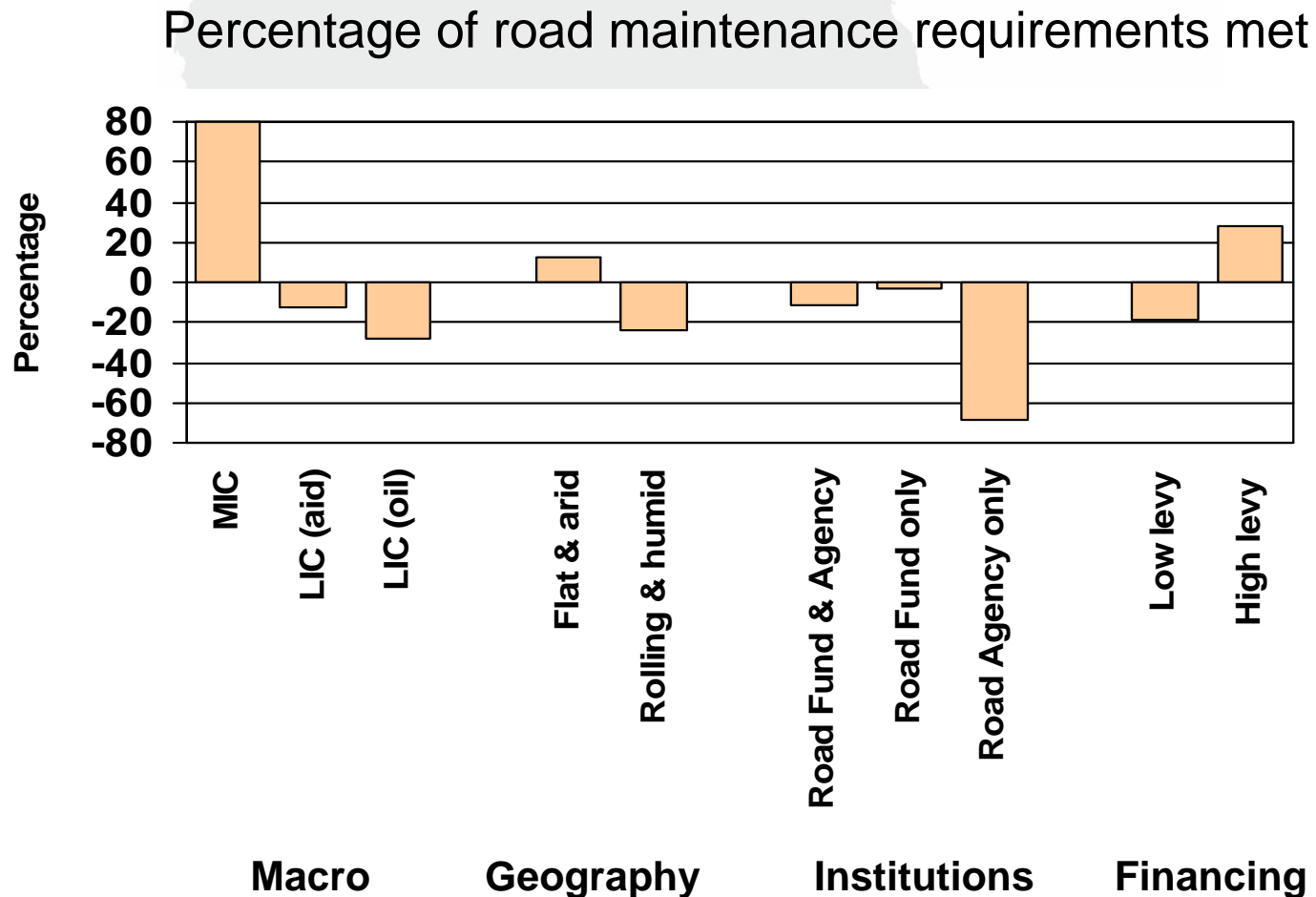
Source: Preliminary results AICD 2008

Large rehabilitation needs are testimony to problem of under-maintenance



Source: Preliminary results AICD 2008

Countries with road funds and high fuel levies do better at funding road maintenance



Source: Preliminary results AICD 2008

Key Message #8

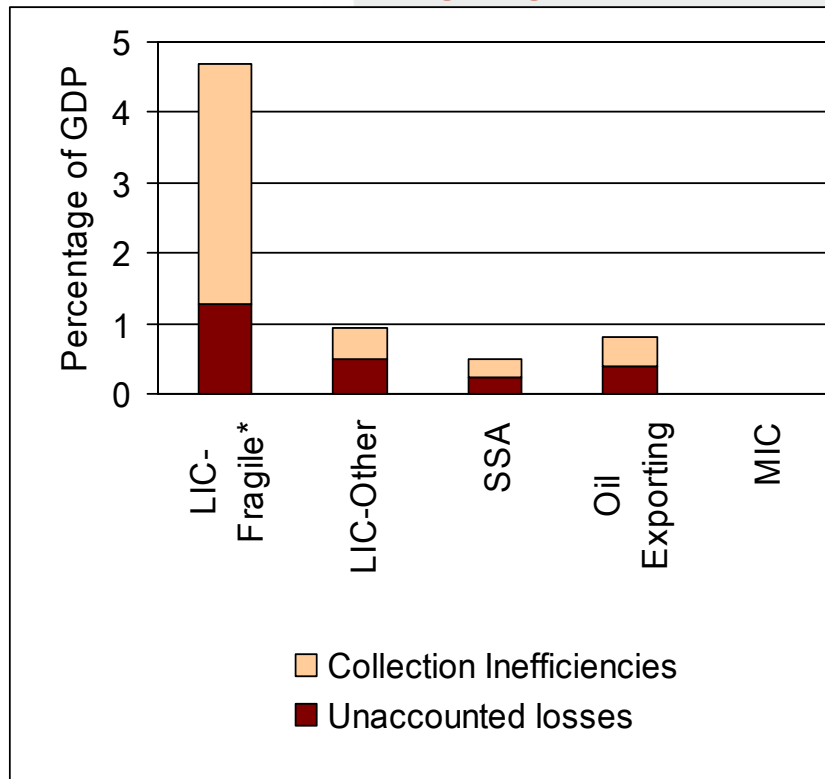
**Utility inefficiency is
wasting US\$3.4 billion
per annum**

African Utilities cost +\$3b per year in Inefficiencies

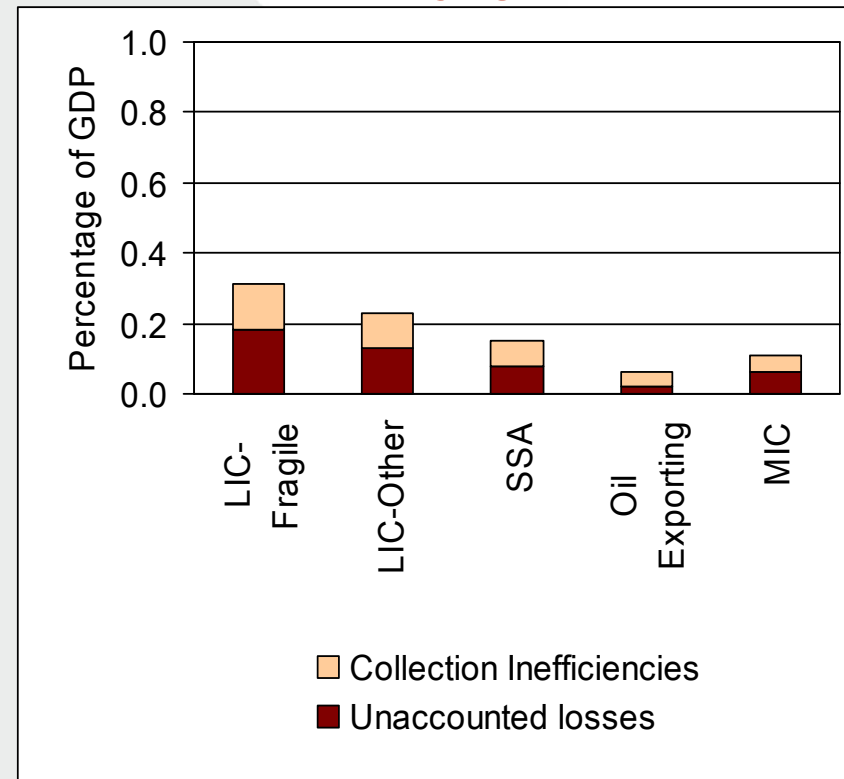
US\$bn	Cost of distribution losses	Cost of uncollected revenues	Total
WSS	0.5	0.4	0.9
Power	1.2	1.3	2.5
Total	1.7	1.7	3.4

In the case of power utilities, the cost averages 0.4% of GDP, but is lower for water

Power

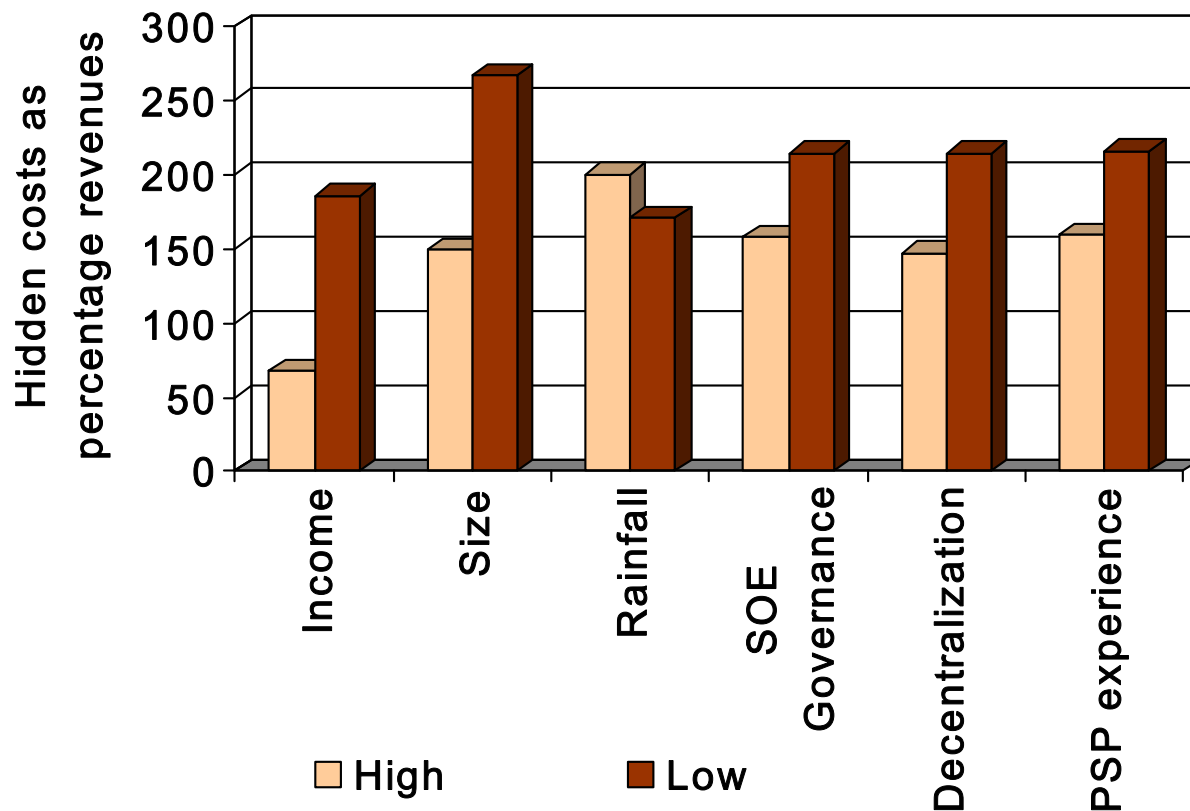


Water



Source: Preliminary results AICD 2008

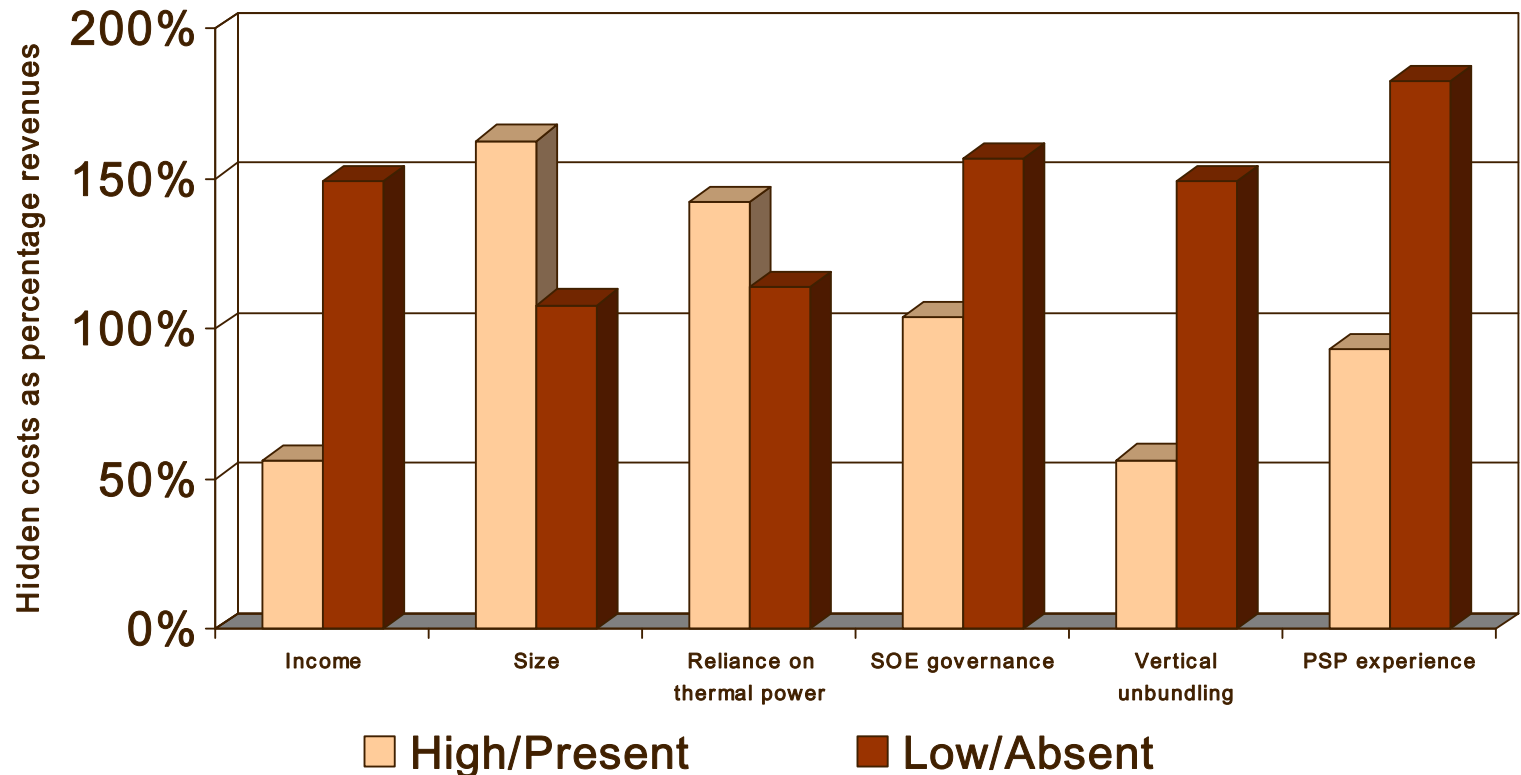
Good institutional frameworks pay-off in terms of lower levels of inefficiency



Water Utilities

Source: Preliminary results AICD 2008

Good institutional frameworks pay-off in terms of lower levels of inefficiency



Power Utilities

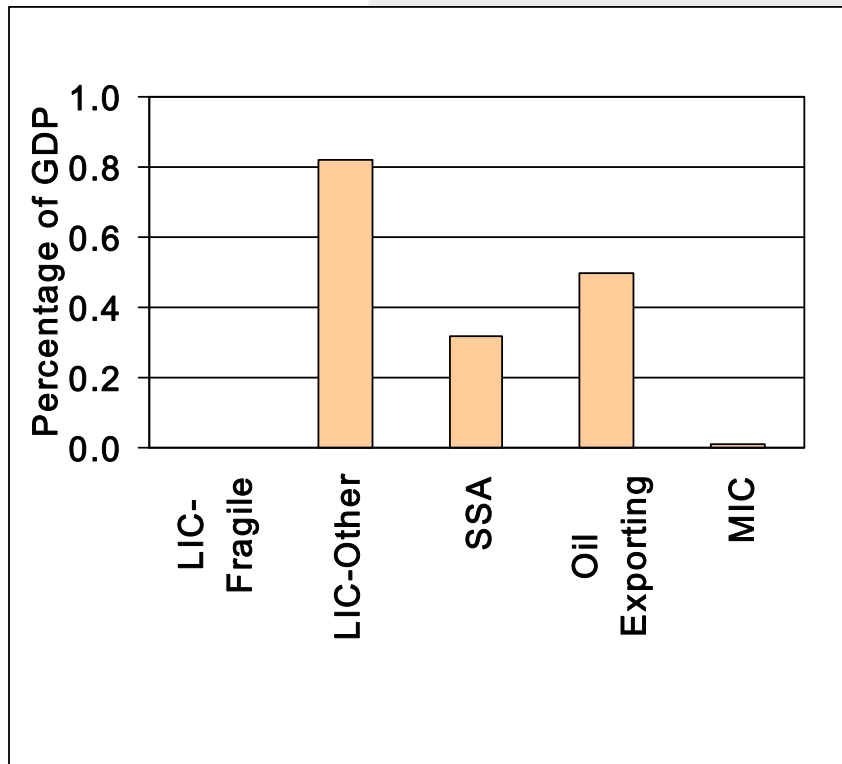
Source: Preliminary results AICD 2008

Key Message #9

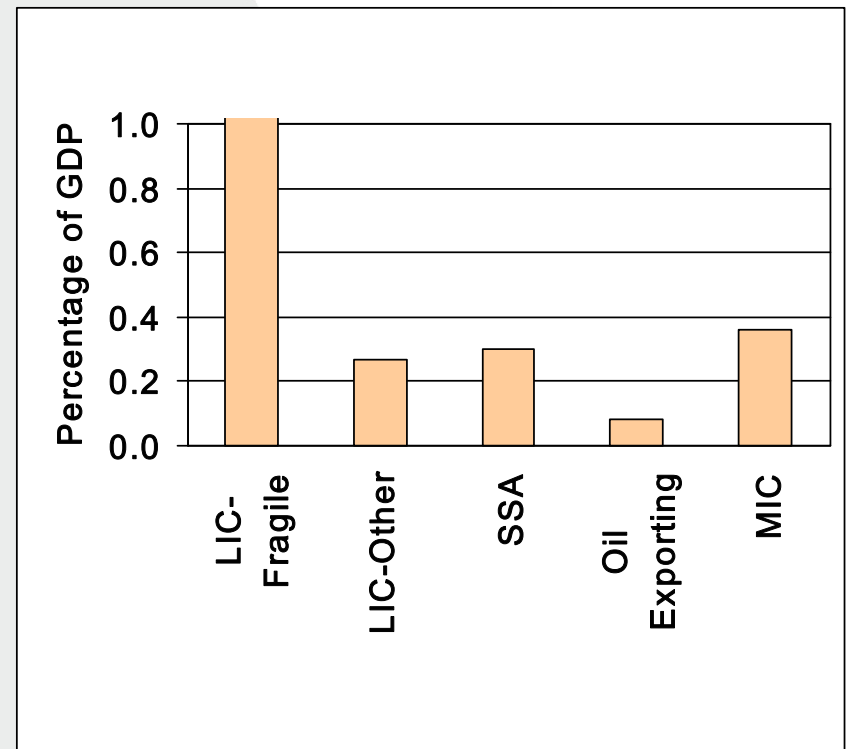
**Under-pricing of services
below cost recovery levels
results in financial losses
US\$4bn per year**

Under-pricing represents 0.3% of GDP on average for power and for water

Power

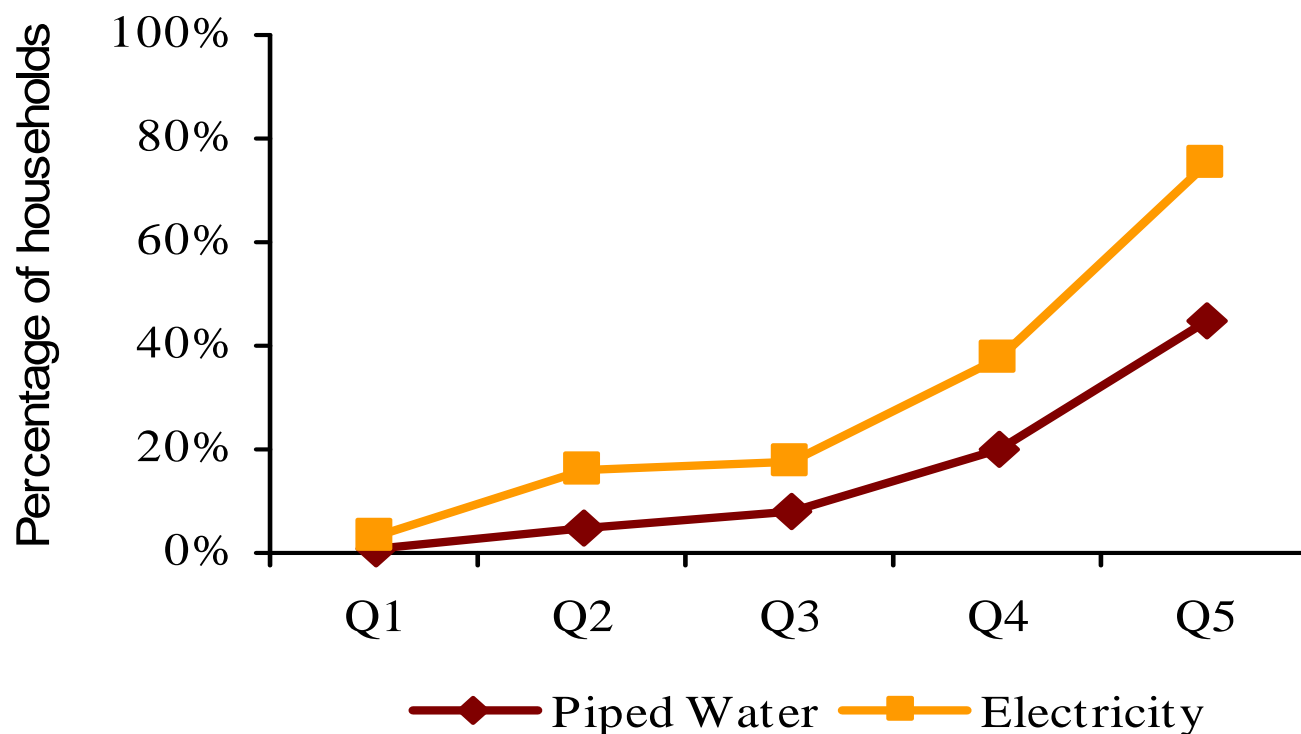


Water



Source: Preliminary results AICD 2008

Around 90% of those with access to piped water or electricity belong to richest 60%



Total monthly household budget (2002 US\$)	National	Rural	Urban	Q1	Q2	Q3	Q4	Q5
	177	130	241	59	97	128	169	340

Source: Preliminary results AICD 2008

Final Message

Improving efficiency is as important as increasing funding when bridging Africa's infrastructure financing gap

More than half of financing gap could (theoretically) be bridged via efficiency

- Large share of gap can be bridged by efficiency measures
- But substantial balance remains for further funding
- May be some scope for technological innovation

	US\$ bn pa
Cost of Catching-up	80
Existing Spending	-50
Financing Gap	+40
• Reallocating expenditures	-8
• Raising capital budget execution	-3
• Reducing SOE inefficiencies	-3
• Increasing cost recovery efforts	-4
Remaining Gap	=22

Source: Preliminary results AICD 2008



AICD Progress, Sustainability and Outstanding Issues

Agenda

- Status of AICD Phase I
- Outreach and dissemination
- Website development
- Status of AICD Phase II
- Long term sustainability



Status of AICD Phase I

Technical work complete and endorsed by TAP and SC

- Full set of AICD Phase I materials completed
 - 17 Background Papers and 16 Working Papers (4 additional WP pending final review)
 - French language summaries available
- Favorable Technical Advisory Panel review
 - TAP met in Tunis in July 2008
 - Co-chaired by CE AfDB (Kasekende) & WB (Devarajan)
 - Written comments received broadly supportive
 - TAP representatives traveled to brief SC
- Endorsement by AICD Steering Committee
 - SC met in Addis in July 2008
 - Two day presentation of main results
 - Broad endorsement of findings
 - Mandate to commence outreach activities

Background papers (1)

General

- 1 Financing Public Infrastructure in Sub-Saharan Africa: Patterns and Issues
- 2 Access, Affordability, and Alternatives: Modern Infrastructure Services in Africa
- 3 Unit Costs of Infrastructure Projects in Sub-Saharan Africa

Investment needs studies

- 4 Costing the Needs for Investment in ICT Infrastructure in Africa
- 5 Irrigation Investment Needs in Sub-Saharan Africa: A Matter of Scale
- 6 Powering Up: Costing Power Infrastructure Investment Needs in Southern and Eastern Africa
- 7 Improving Connectivity: Investing in Transport Infrastructure in Sub-Saharan Africa

Background papers (2)

State of the sector reviews

- 8 Air Transport: Challenges to Growth
- 9 Information and Communications Technology in Sub-Saharan Africa: A Sector Review
- 10 Watermarks: Indicators of Irrigation Sector Performance in Sub-Saharan Africa
- 11 Beyond the Bottlenecks: Ports in Sub-Saharan Africa
- 12 Underpowered: The State of the Power Sector in Sub-Saharan Africa
- 13 Taking Stock of Railway Companies in Sub-Saharan Africa
- 14 The Burden of Maintenance: Roads in Sub-Saharan Africa
- 15 Stuck in Traffic: Urban Transport in Africa
- 16 Ebbing Water, Surging Deficits: Urban Water Supply in Sub-Saharan Africa
- 17 Climbing the Ladder: The State of Sanitation in Sub-Saharan Africa

Working Papers (1)

WP1	Making Sense of Sub-Saharan Africa's Infrastructure Endowment: A Benchmarking Approach
WP2	Paying the Price for Unreliable Power Supplies: Own Generation of Electricity by Private Firms in Africa
WP3	Infrastructure and Growth in Africa
WP4	Electricity Reforms in Mali: A Micro-Macro Analysis of the Effects on Poverty and Distribution
WP5	Electricity Reforms in Senegal: A Micro-Macro Analysis of the Effects on Poverty and Distribution
WP6	Building Sector Concerns into Macro-Economic Financial Programming: Lessons from Senegal and Uganda
WP7	Cost Recovery, Equity, and Efficiency in Water Tariffs: Evidence from African Utilities
WP8	Potential for Local Private Finance of Infrastructure in Africa
WP9	Constraints on Firm Productivity in Africa Impact of Infrastructure
WP10	A Tale of Three Cities: Understanding Differences in Provision of Modern Services

Working Papers (2)

-
- | | |
|------|------------------------------------------------------------------------|
| WP11 | Electricity Tariffs and the Poor: Case Studies from Sub-Saharan Africa |
|------|------------------------------------------------------------------------|
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|------|------------------------------------------------------------------|
| WP12 | Water Tariffs and the Poor: Case Studies from Sub-Saharan Africa |
|------|------------------------------------------------------------------|
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|------|-------------------------------------------------------------------------------------------------------|
| WP13 | Provision of Water to the Poor in Africa: Informal Water Markets and Experience with Water Standposts |
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| WP14 | Transport Prices and Costs in Africa: A Review of the Main International Corridors, |
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| WP15 | The Impact of Infrastructure Spending in Sub-Saharan Africa: A CGE Modeling Approach |
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| WP16 | Water Reforms in Senegal: A Micro-Macro Analysis of the Effects on Poverty and Distribution |
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| WP17 | Fiscal Costs of Infrastructure Provision: A Practitioner's Guide |
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| WP18 | Lifecycle Costs of Roads Under Alternative Maintenance Scenarios |
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| WP19 | Crop Production and Road Connectivity in Sub-Saharan Africa: A Spatial Analysis, |
|------|----------------------------------------------------------------------------------|
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|------|-------------------------------------------------------------------------|
| WP20 | Are Electricity Distribution Companies Efficient?: Evidence from Africa |
|------|-------------------------------------------------------------------------|
-
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Country Reports (1)



CR4	<i>Infrastructure in Cape Verde</i>
CR6	<i>Infrastructure in Democratic Republic of Congo</i>
CR8	Infrastructure in Ethiopia
CR9	<i>Infrastructure in Ghana</i>
CR10	Infrastructure in Kenya
CR14	<i>Infrastructure in Mozambique</i>
CR22	<i>Infrastructure in Tanzania</i>
CR23	<i>Infrastructure in Uganda</i>

TAP Membership

■ TAP membership

- Prof. Adeola Adenikinju (Nigeria)
- Prof. Emmanuelle Auriol (France)
- Prof. Tony Gomez-Ibanez (US)
- Prof. Xinzhu Zhang (China)
- Mr. Cheikh Kane (Senegal)
- Dr. Louis Kasekende (AfDB, Chief Economist)
- Dr. Shanta Devarajan (AFRVP, Chief Economist)

Status of 'Flagship Report'

- First draft of Flagship Report circulated at SC Meeting
- Internal Reading Groups conducted to enhance quality of each chapter
- Second draft of Flagship Report close to completion
- Internal Decision Meeting scheduled for early April 2009
- Final manuscript to be submitted to WB EXTOP by end May 2009
- Physical publication and launch planned for November 2009

Contents of 'Flagship Report'

0. The Africa Infrastructure Country Diagnostic

A. Cross-cutting Challenges

1. Meeting Africa's infrastructure needs

2. Closing the Financing Gap

3. Dealing with Poverty and Inequality

4. Addressing Institutional Deficiencies

5. Spanning Urban and Rural Spaces

6. Integrating Across National Borders

Contents of 'Flagship Report'

B.	Sector by Sector Challenges
7.	ICT
8.	Power
9.	Transport
10.	Roads
11.	Railways
12.	Ports
13.	Air Transport
14.	Water Resources
15.	Irrigation
16.	Water Supply
17.	Sanitation
C.	The Way Forward
18.	Towards a Policy Agenda for Infrastructure

Budget Statement for Phase I

US\$m	Grant	Disbursed	Committed	Uncommitted
WB Supervision	1.11			
AFD	0.26			
DFID	1.82			
EC	0.36			
TOTAL MDTF	2.44	2.36	0.08	0.00
PPIAF	1.00	0.71	0.25	0.17
Total FT	3.44	3.07	0.33	0.17



Outreach and Dissemination

Outreach Activities to Date

- WB-IMF Annual Meetings (October 2008)
- Gates Foundation (September 2008)
- ICA Water Financing Conference (November 2009)
- AU Summit (February 2009)
- European Road Show (September 2008)
 - AFD, DFID, EC, EIB
- African Road Show (on-going)
 - DRC (July 2008)
 - Cape Verde (August 2008)
 - Ethiopia (January 2009)
 - Kenya (February 2009)
- US-Africa Partnership Forum (February 2009)
- Water Week (February 2009)

Example: Kenya AICD Country Workshop

- Preparatory work sketching main country results and benchmarking
- Technical consultation with local sector experts to validate/update findings
- Two level outreach
 - Closed doors Ministerial level workshop
 - Public event (private sector, NGOs, media)
- Systematic press engagement
 - Circulation of key briefing materials
 - Publication of country specific results through op-ed
- Country report drafted and shared with local counterparts

Example: Kenya Media Coverage

The Standard February 6, 2009

By John Oyuke

The Government will need to the next decade, in order to m

This would bring the total an Kenya compares well with lo where it aims to be by 2030.

The allocation of the funds v sector.

In its new study, "Africa Infra has left much of the existing ir

World Bank Lead Economist raise the extra funds needed,

"Burden of spending needs country is already spending Technology and power.Foste Infrastructure Country Diagno Zutt in Nairobi yesterday.

More Studies Needed

The financier on behalf of a regional economic communit donors is implementing the AI

Focusing initially on 24 countries, the AICD seeks to

WB urges Kenya to focus on infrastructure development

6 février 2009

(c) 2009 Xinhua News Agency

NAIROBI, Feb. 6 (Xinhua) -- The **World Bank** has called on the K annual infrastructure budget by at least 10 billion shillings (about 12 next decade so that the country can achieve middle-income economi

The **World Bank** s released in Nairobi utilization.

"The burden of sper Country Diagnostic

According to the st from middle-incom

The allocation of th The bank said poor

World Bank Lead raise the extra funds

The study's release seeks to transform t of 10 percent by 20

But the study, whic public investment fi implementation.

It is worth noting th billion shillings in t

Focusing initially o Africa and provide measured.

The Daily Nation

By JUSTUS ONDARI Thursday, February 5 2009 at 17:37

Kenya must spend about Sh166 billion annually on infrastructure over the next 10 years if it is to attain a middle-income economic status.

According to a **World Bank** study which was conducted between 2004 and 2006 but whose initial findings were released in Nairobi on Thursday, the country can afford it with efficient resource allocation and utilisation.

Spending needs

"The burden of spending needs is manageable given **Kenya's** economy," notes the Africa Infrastructure Country Diagnostic study titled *Africa's Infrastructure: A Time for Transformation* .

Its release comes at a time when critics are questioning the implementation of Vision 2030 which seeks to transform the country into a middle-income economy with, among others, an annual growth rate of 10 per cent by 2030.

But the study, which will be released in full later in the year, says the funds could be raised by improving public investment framework, planning, project screening, procurement, budget execution and project implementation.

It is worth noting that development expenditure, much of which goes to infrastructure, declined from Sh202 billion in the 2006/07 Budget to Sh196 billion in the 2007/08 Budget.

The study, which covers 24 countries and focuses on four sectors, says the country already spends Sh150 billion on infrastructure. But much of it - about Sh1.2 billion - goes to the information and communication technology (ICT) and power sectors.

DAILY NATION

Friday February 13, 2009

Opinion

JOHANNES ZUTT: Infrastructure that Kenyans want

By JOHANNES ZUTTPosted Thursday, February 12 2009 at 18:10

re compares favourably th middle-income status.

frica's Infrastructure: A r partners, including the ement, Department for blic-Private Infrastructure

within range of a GSM

ower utility on a path to

rastructure bottlenecks

s domestic product (GDP)

ut 1,000 MW of additional tries, at a cost of about

leneck.

rm of critical road and rail strategic investor, as

Outreach activities planned

- Continue country level workshops
 - Larger countries (in-country workshops)
 - Smaller countries (via GDLN)
- Continue participation in sector conferences
 - Africa Roads 2009
 - Private Investors for Africa 2009
- Further coverage of European donors
 - Germany, Sweden
- AfDB Annual Meetings (May 2009)
- WB Annual Meetings (October 200)
- Official Launch Event (November 2009)

Train the trainers

- To reach out effectively and develop ownership of results more spokespersons are required
- Need to train potential spokespersons from all partner institutions
 - Pilot workshop with PPIAF staff (October 2008)
- Methodology is to go through presentation materials at slow speed
- Need to prepare guidance package with speaker notes and FAQ for spokespersons

Materials to support dissemination

- Outreach experience so far pointed to need for accessible material tailored to different audiences
- Regional Results
 - AICD Brochure (English, French)
 - AICD Technical Synopsis (English, French)
 - Summary Presentations focusing on main messages
 - AICD Multimedia Presentation (English, French coming)
- Country Reports
 - Focus on benchmarking indicators
 - Identifying key achievements and challenges
 - Presenting country level financing framework

Strategy for final publication

- Use of WB EXTOP channels to achieve mass outreach
- Advised to package Background Papers as companion sectoral books
 - ICT in Africa
 - Power in Africa
 - Transport in Africa
 - Water in Africa
- Working Papers to be published through existing WB Policy Research Paper series

WB EXTOP Dissemination of publications

■ Institutional Dissemination

- WB county offices
- public information centers
- libraries and archives
- 250 WB depository libraries

■ Steep discounts: 75% LIC, 35% MIC

■ Electronic Publishing

- E-library
- Content aggregators
- Google Book Program
- Free web access

■ Translation to French at low cost using international co-publishing partners

■ Licenses to reproduce and reprint



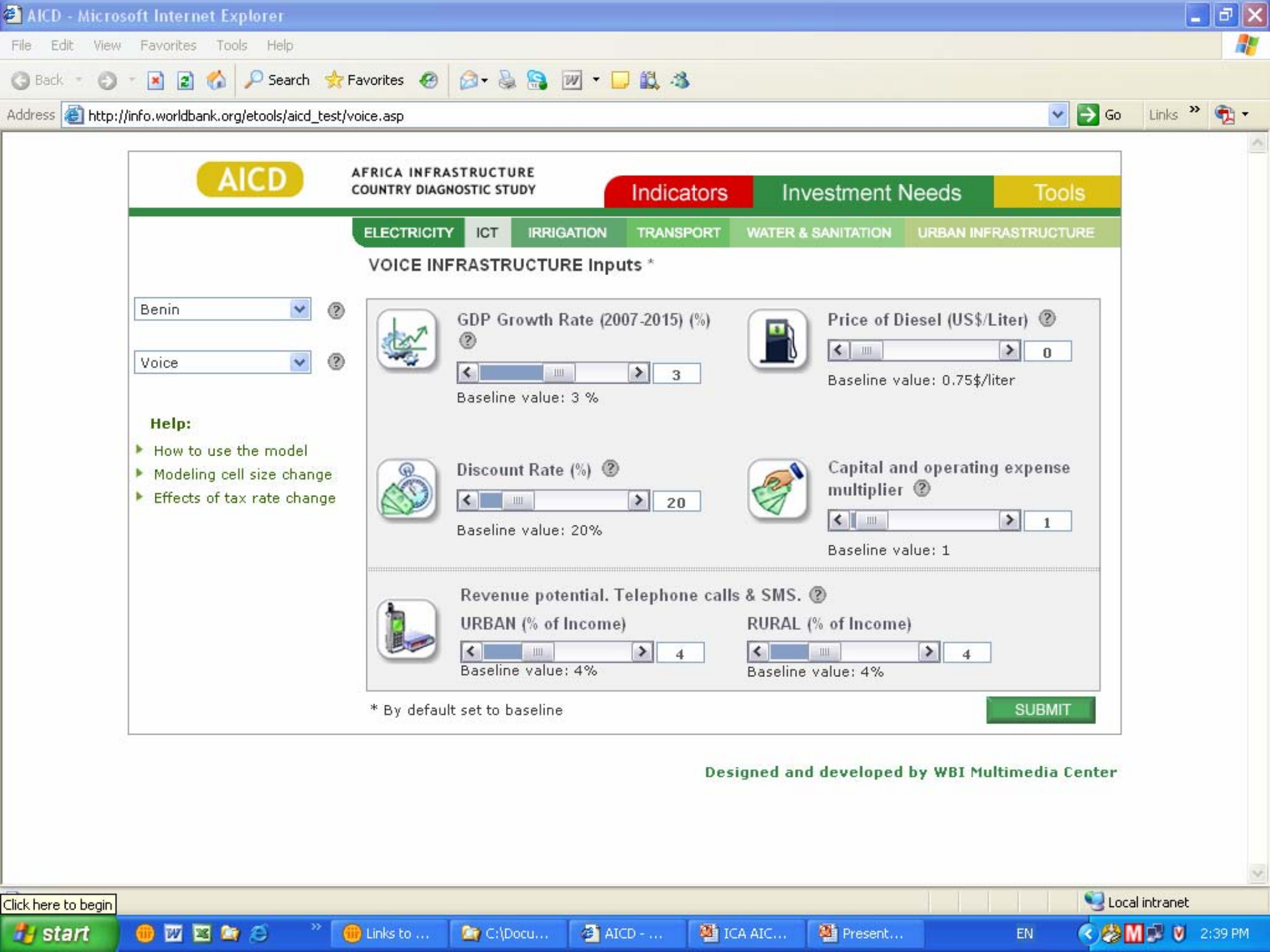
Website Development

New website

- New website under development with independent branding
- New website is major improvements going beyond document sharing
 - Summary of major results (messages and graphics)
 - Browseable by country, sector and themes
 - Interactive models for investment needs, finance and affordability
 - GIS tool to download and customize spatial data
 - Downloadable customizable databases
 - Library of documents
- Launch to be coordinated with Flagship report

Major website expansion

- Provisional website place holder and vehicle for sharing documents
- Final website to host major data tools
 - Interactive models for investment needs
 - GIS Interactive tool
 - Headline indicators for policy makers
 - DDP Excel data tool for technicians



AICD

AFRICA INFRASTRUCTURE
COUNTRY DIAGNOSTIC STUDY

Indicators

Investment Needs

Tools

ELECTRICITY

ICT

IRRIGATION

TRANSPORT

WATER & SANITATION

URBAN INFRASTRUCTURE

VOICE INFRASTRUCTURE Inputs *

Benin

Voice

Help:

- ▶ How to use the model
- ▶ Modeling cell size change
- ▶ Effects of tax rate change



GDP Growth Rate (2007-2015) (%)

3

Baseline value: 3 %



Price of Diesel (US\$/Liter)

0

Baseline value: 0.75\$/liter



Discount Rate (%)

20

Baseline value: 20%



Capital and operating expense multiplier

1

Baseline value: 1



Revenue potential. Telephone calls & SMS.

URBAN (% of Income)

4

Baseline value: 4%



RURAL (% of Income)

4

Baseline value: 4%

* By default set to baseline

SUBMIT

Designed and developed by WBI Multimedia Center

Click here to begin

Local intranet

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Links to ...

C:\Docu...

AICD - ...

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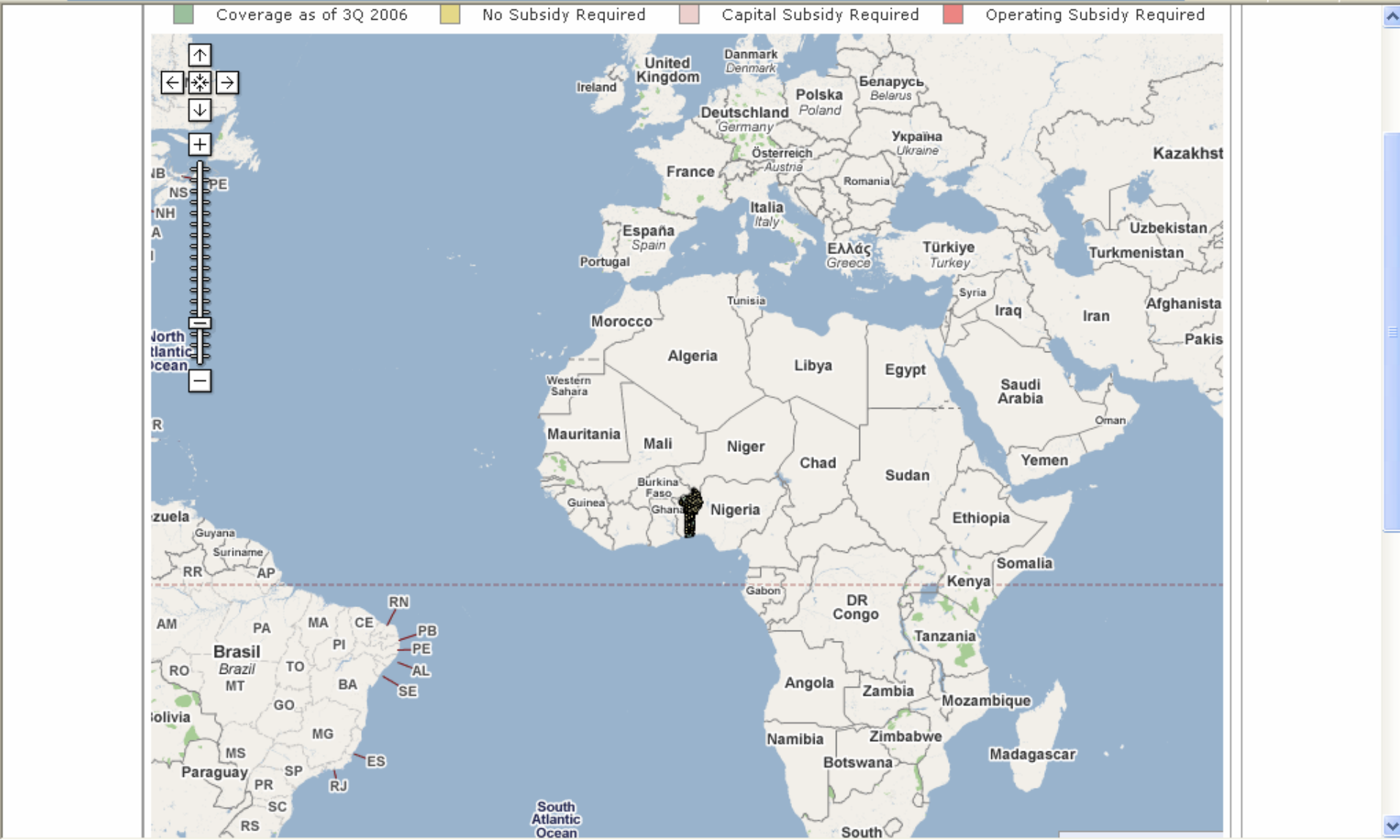
2:39 PM

AFRICA INFRASTRUCTURE
COUNTRY DIAGNOSTIC STUDY

Sensitivity Analysis: VOICE INFRASTRUCTURE. GSM (2G) Market & Access Gaps

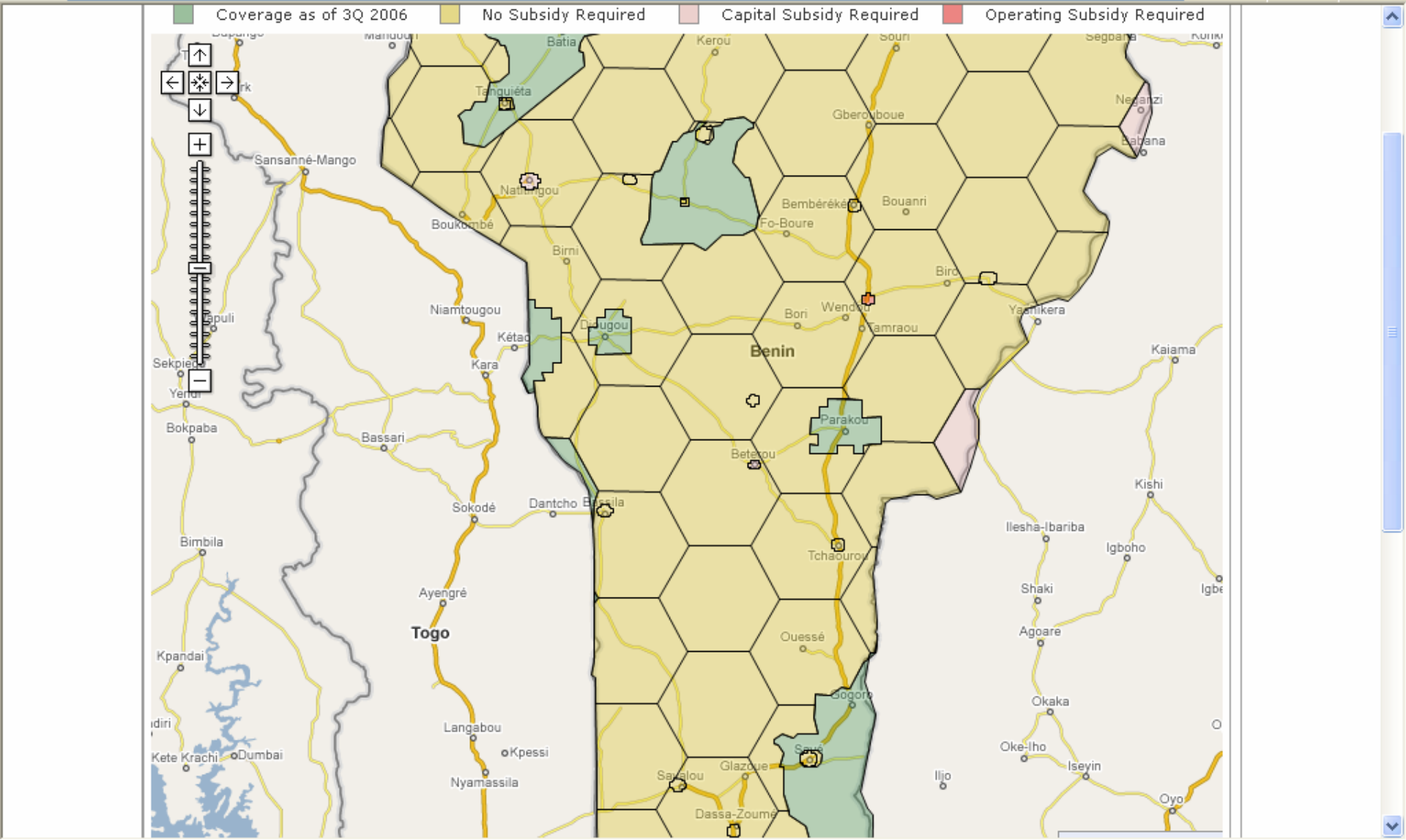
The map displays the country of Benin with a hexagonal grid overlay. The grid is composed of yellow hexagons, with some cells highlighted in green or pink. Major cities are marked with black dots and labeled, including Cotonou (the capital), Porto Novo, and Parakou. Neighboring countries are labeled: Nigeria to the north and east, Togo to the west, and Chad to the south. A legend in the top left corner provides symbols for various features: a star for the capital, a circle for other cities, a line for roads, and a shaded area for the grid. The map also shows major roads and rivers.



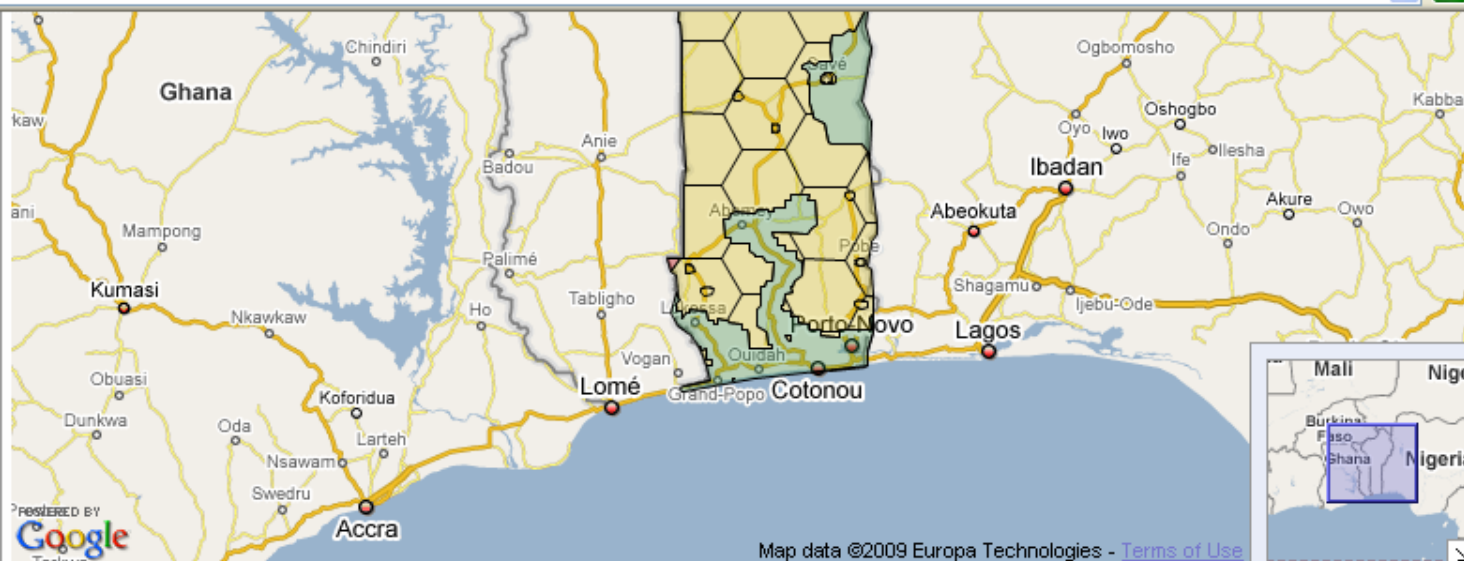












	Coverage as of 3Q 2006	No Subsidy Required	Coverage Gap	
			Capital Subsidy Required	Operating Subsidy Required
% of Population	42.60%	56.40%	0.80%	0.20%
Total Investment		\$125,689	\$12,876	\$4,905
Capex (US \$1000)		\$33,439	\$3,426	\$1,305
Opex (US \$1000, 2007-2015)		\$92,250	\$9,450	\$3,600

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AICD

AFRICA INFRASTRUCTURE
COUNTRY DIAGNOSTIC STUDY

Indicators

Investment Needs

Tools

ELECTRICITY

ICT

IRRIGATION

TRANSPORT

WATER & SANITATION

URBAN INFRASTRUCTURE

BROADBAND INFRASTRUCTURE Inputs *

Tanzania

Broadband



GDP Growth Rate (2006-2015) (%) ?

3

Baseline value: 3 %



Cost of Capital (%) ?

20

Baseline value: 20%



Capex & Operating Expense Multiplier ?

1

Baseline value: 1



Consumer Willingness to Pay. Telephone calls & SMS. ?

URBAN (% of Income)

1

Baseline value: 6%

RURAL (% of Income)

1

Baseline value: 6%

* By default set to baseline

SUBMIT



Sensitivity Analysis: BROADBAND INFRASTRUCTURE - Market Frontier & Access Gaps



% of population

x

Democratic Republic of Congo

Efficient Market Gap ?

Coverage Gap ?

% of Population

93.7%

6.2%

Total Investment

\$246225.402

\$59989.844

Click here to begin

Local intranet

start

Links to ...

C:\Docu...

AICD - ...

ICA AIC...

Present...

EN

2:40 PM

% of population



Efficient Market Gap

Coverage Gap

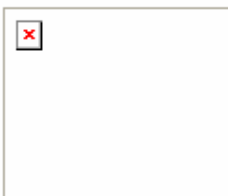
Democratic Republic of Congo**Efficient Market Gap ?****Coverage Gap ?**

% of Population	93.7%	6.2%
Total Investment	\$246225.402	\$59989.844
Capex (US \$1000)	\$135,025.402	\$22,789.844
Opex (US \$1000)	\$111,200.000	\$37,200.000
Cap Investment/Inhabitant (US\$)	\$770.302	\$3,349.443

Assumptions: (selected values)	GDP Growth rate (2006-2015)	3%	Consumer willingness to pay: urban	1%
	Cost of Capital	20%	Consumer willingness to pay: rural	1%
	Capex & Operating Expense Multiplier	1		

Baseline Scenario: BROADBAND INFRASTRUCTURE - Market Frontier & Access Gaps

% of population



Efficient Market Gap

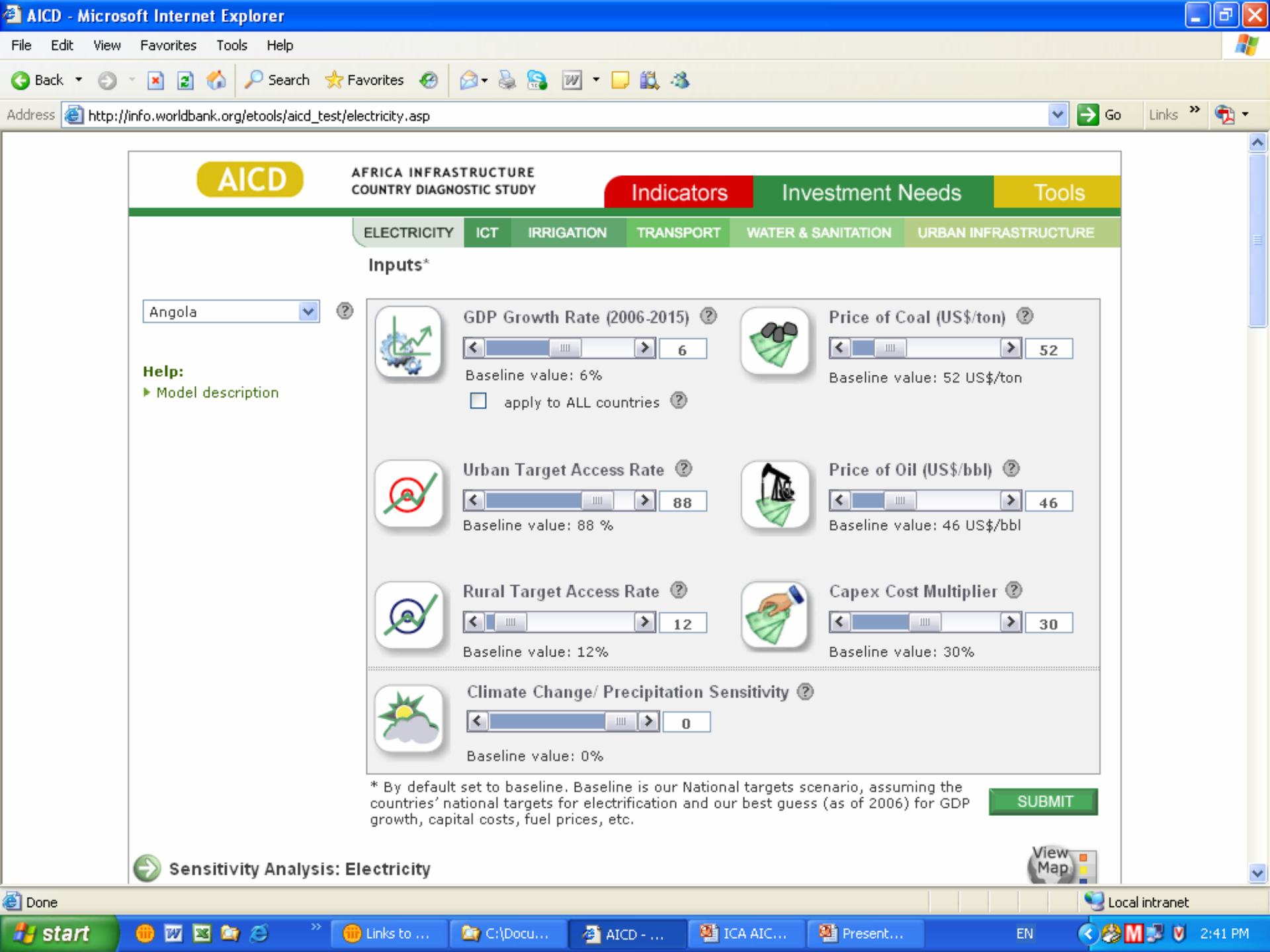
Coverage Gap

Democratic Republic of Congo**Efficient Market Gap ?****Coverage Gap ?**

% of Population	93.7%	6.2%
Total Investment	\$246225.402	\$59989.844
Capex (US \$1000)	\$135,025.402	\$22,789.844
Opex (US \$1000)	\$111,200.000	\$37,200.000
Cap Investment/Inhabitant (US\$)	\$770.302	\$3,349.443

Assumptions: (selected values)	GDP Growth rate (2006-2015)	3.0%	Consumer willingness to pay: urban	1%
	Cost of Capital	20.0%	Consumer willingness to pay: rural	1%
	Capex & Operating Expense Multiplier	1		

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Sensitivity Analysis: Electricity



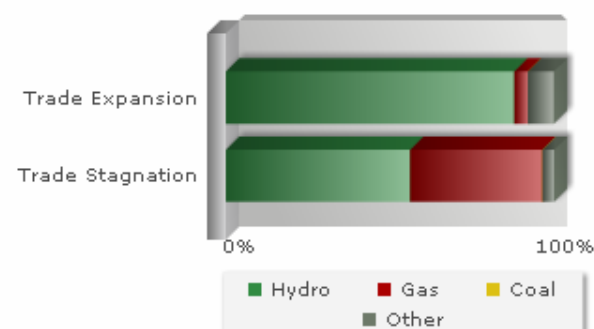
Existing capacity and investments before 2015 (MW) ?

Angola			SAPP Region ?	
	Trade Expansion	Trade Stagnation	Trade Expansion	Trade Stagnation
Generation capacity				
Installed in 2015	619.71	619.71	17135.96	17135.96
Refurbishment	199.78	302.38	28035.01	28136.71
New investments	4.43	911.3	27528.31	26688.72
Interconnector capacity				
Installed	0	0	18602	18602
New investments	2977.59	0	22845.87	0

Annualized costs (million US\$) ?

Angola			SAPP Region ?	
	Trade Expansion	Trade Stagnation	Trade Expansion	Trade Stagnation
Generation				
Investment cost	1.87	186.94	4747.25	5231.62
Refurbishment cost	10.6	12.09	1340.23	1341.67
Variable cost (Fuel, O&M)	0.02	239.15	4869.62	5712.35
New capacity	0.02	190.52	1413.25	2295.29
Existing capacity	0	48.63	3456.38	3417.06

Technology mix of generation capacity ?



Assumptions (selected values)	GDP Growth rate (2006-2015)	6%	+	Urban Target Access rate	88%	+	Rural Target Access rate	12%	+
	Price of Coal (US\$/ton)	52		Price of oil (US\$/bbl)	46		Capex & Opex Multiplier	30%	
	Climate Change Sensitivity	0%							

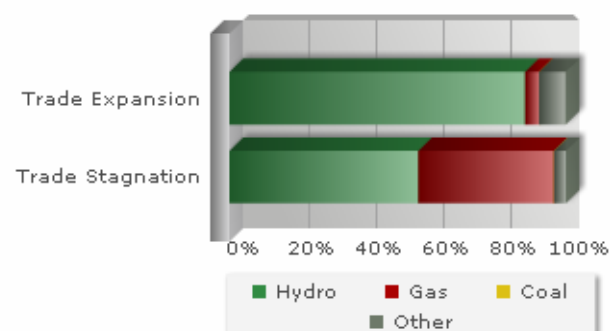
 **Baseline Scenario: Electricity**

Baseline Scenario: Electricity
Existing capacity and investments before 2015 (MW) ?

Angola			SAPP Region ?	
	Trade Expansion	Trade Stagnation	Trade Expansion	Trade Stagnation
Generation capacity				
Installed in 2015	619.71	619.71	17135.96	17135.96
Refurbishment	199.78	302.38	28035.01	28136.71
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Interconnector capacity				
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Annualized costs (million US\$) ?

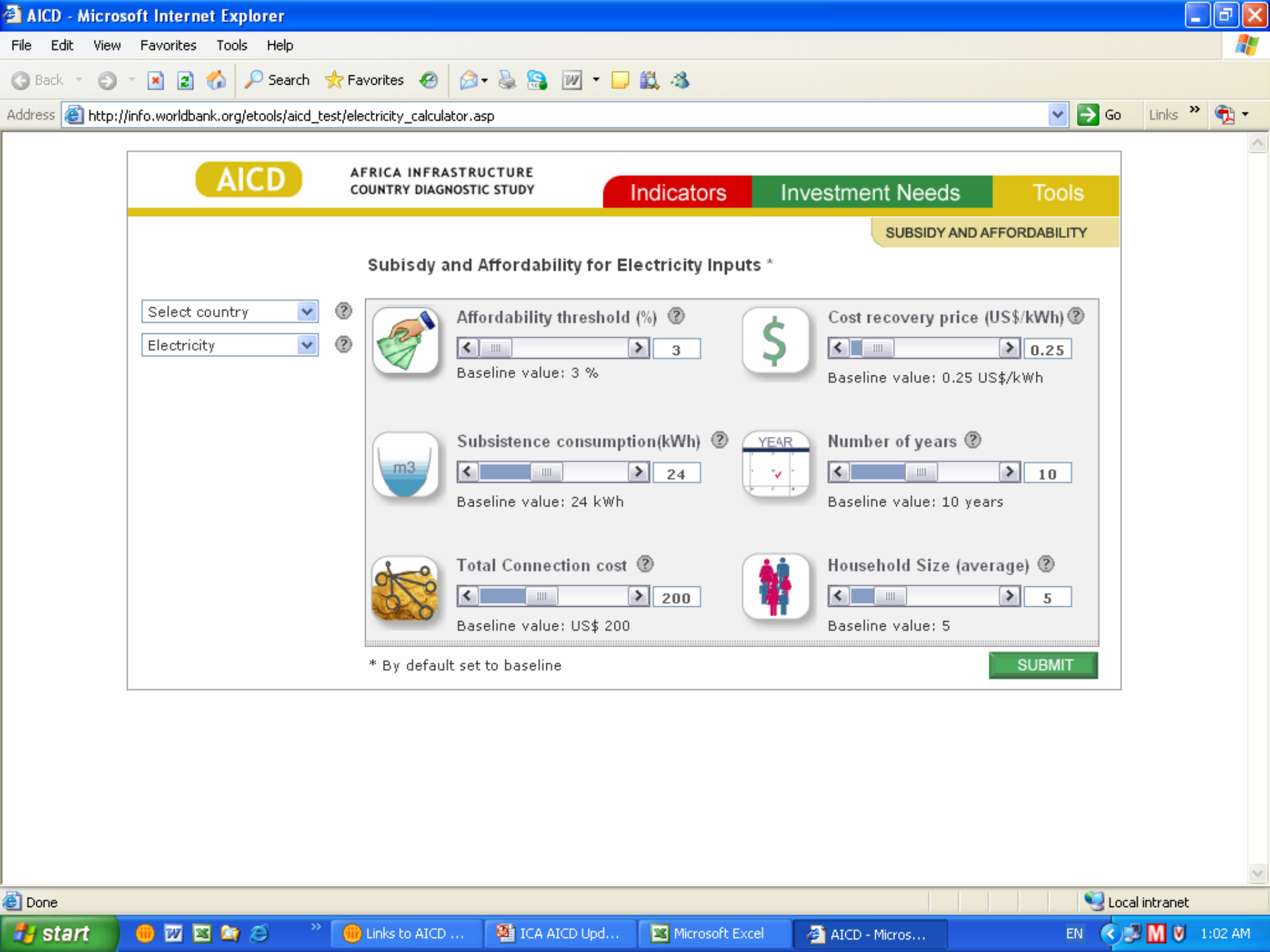
Angola			SAPP Region ?	
	Trade Expansion	Trade Stagnation	Trade Expansion	Trade Stagnation
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Investment cost	1.87	186.94	4747.25	5231.62
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Technology mix of generation capacity ?

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Generation				
Investment cost	1.87	186.94	4747.25	5231.62
Refurbishment cost	10.6	12.09	1340.23	1341.67
Variable cost (Fuel, O&M)	0.02	239.15	4869.62	5712.35
New capacity	0.02	190.52	1413.25	2295.29
Existing capacity	0	48.63	3456.38	3417.06
T&D and Interconnectors				
Investment Cost	391.04	251.57	2709.15	2260.5
Refurbishment cost	38.24	38.24	1213.49	1213.49
Variable cost of existing capacity	77.69	77.69	3100.31	3100.31
Total	519.45	805.67	17980.06	18859.94

Assumptions (selected values)	GDP Growth rate (2006- 2015)	6%	Urban Target Access rate	88%	Rural Target Access rate	12%
	Price of Coal (US\$/ton)	52	Price of oil (US\$/bbl)	46	Capex & Opex Multiplier	30%
	Climate Change Sensitivity	0%				

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* By default set to baseline

SUBMIT
Sensitivity Analysis: ANNUAL SUBSIDY COSTS FOR ELECTRICITY

Cameroon	Total ?
Percentage of households requiring subsidy (%)	100
Total annual cost of subsidy for service usage by existing consumers (US\$m)	70,927,165.36
Total annual cost of subsidy for service usage by existing consumers (% GDP)	0.725
Total annual cost of subsidy for service usage by new consumers (US\$m)	28,389,888.6
Total annual cost of subsidy for service usage by new consumers (% GDP)	0.29
Total one time cost of subsidy for connection (US\$m)	8,516,967
Total one time cost of subsidy for connection (% GDP)	0.087

Assumptions (selected values)	Affordability threshold	3 %	Subsistence consumption	24 US\$/kWh	Total Connection cost	\$200
	Cost recovery price	0.25 US\$/kWh	Number of years	10	Household Size (average)	5

Baseline Scenario: ANNUAL SUBSIDY COSTS FOR ELECTRICITY

Cameroon	Total ?
Percentage of households requiring subsidy (%)	100
Total annual cost of subsidy for service usage by existing consumers (US\$m)	70,927,165.36
Total annual cost of subsidy for service usage by existing consumers (% GDP)	0.725

➔ **Baseline Scenario: ANNUAL SUBSIDY COSTS FOR ELECTRICITY**

AICDAFRICA INFRASTRUCTURE
COUNTRY DIAGNOSTIC STUDY**Indicators****Investment Needs****Tools****ELECTRICITY****ICT****IRRIGATION****TRANSPORT****WATER & SANITATION****URBAN INFRASTRUCTURE****Capital Investment for Irrigation Inputs ***

Tanzania

**Dam-based and Small-scale irrigation****Discount rate** ☐ 5% ☒ 12% ☐ 15%

Baseline: 12%

Dam-based irrigation**Irrigation infrastructure cost (US\$/ha irrigated)** ☒ \$1000 ☐ \$3000 ☐ \$6000

Baseline: 1000 US\$/ha

Small-scale irrigation**Irrigation infrastructure cost (US\$/ha irrigated)** ☒ \$600 ☐ \$2000 ☐ \$6000

Baseline: 600 US\$/ha

Reinvestment cycle (years) ☐ 5 ☒ 10

Baseline: 10 years

* By default set to baseline

SUBMIT**Sensitivity Analysis: Capital Investment for Irrigation**

Tanzania	Dam-based irrigation	Small scale	Total Irrigation
Increase in irrigated area ('000 ha)	253.87	974.33	1,228.20

Tanzania	Dam-based irrigation ?	Small scale ?	Total Irrigation ?
Increase in irrigated area ('000 ha)	253.87	974.33	1,228.20
Investment costs (US\$ million)	279	584.60	\$863.6
Benefit cost ratio (Ratio of NPV to fixed capital investment)	2.79	1.40	

Assumptions (selected values)	Unit cost for on-farm investment	Discount rate	Reinvestment cycle	Water delivery cost
Dam-based irrigation ▶	\$1000 US\$/ha	12%	N/A	0.01 US\$/m ³
Small-scale irrigation ▶	\$600 US\$/ha	12%	10 years	N/A

Baseline Scenario: Capital Investment for Irrigation

Tanzania	Dam-based irrigation ?	Small scale ?	Total Irrigation ?
Increase in irrigated area ('000 ha)	253.87	974.33	1,228.20
Investment costs (US\$ million)	279	584.60	\$863.6
Benefit cost ratio (Ratio of NPV to fixed capital investment)	2.79	1.40	

Assumptions (baseline values)	Unit cost for on-farm investment	Discount rate	Reinvestment cycle	Water delivery cost
Dam-based irrigation ▶	\$1000 US\$/ha	12%	N/A	0.01 US\$/m ³
Small-scale irrigation ▶	\$600 US\$/ha	12%	10 years	N/A

Administrative Boundaries

- Capitals
- national
 - provincial

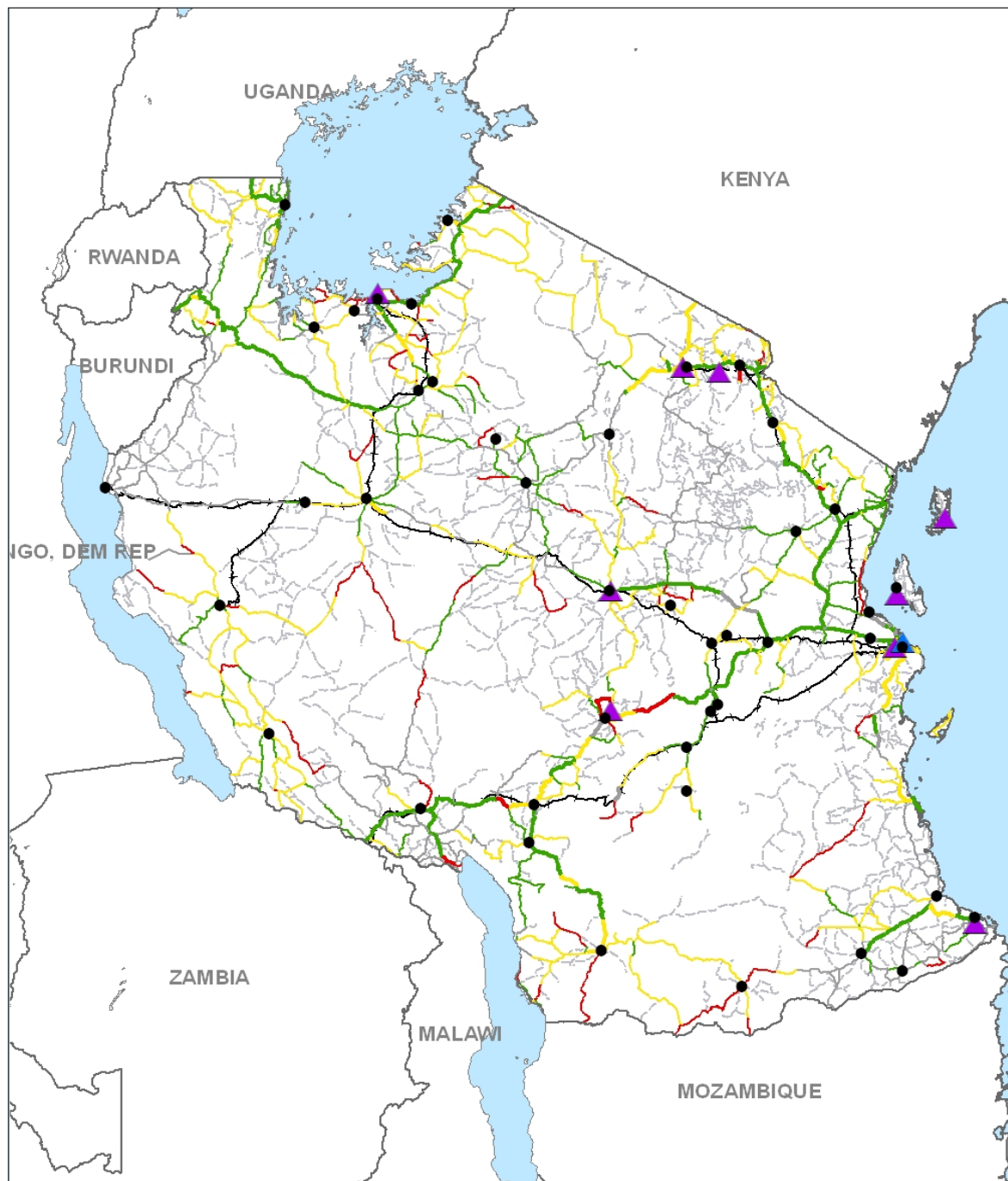


Transportation Network

- cities > 50,000
- ▲ major ports
- ▲ airports

	Paved	Unpaved
Good, Very Good	—	—
Fair	—	—
Poor, Very Poor	—	—
Unknown	—	—

- unclassified roads
- +— railroad



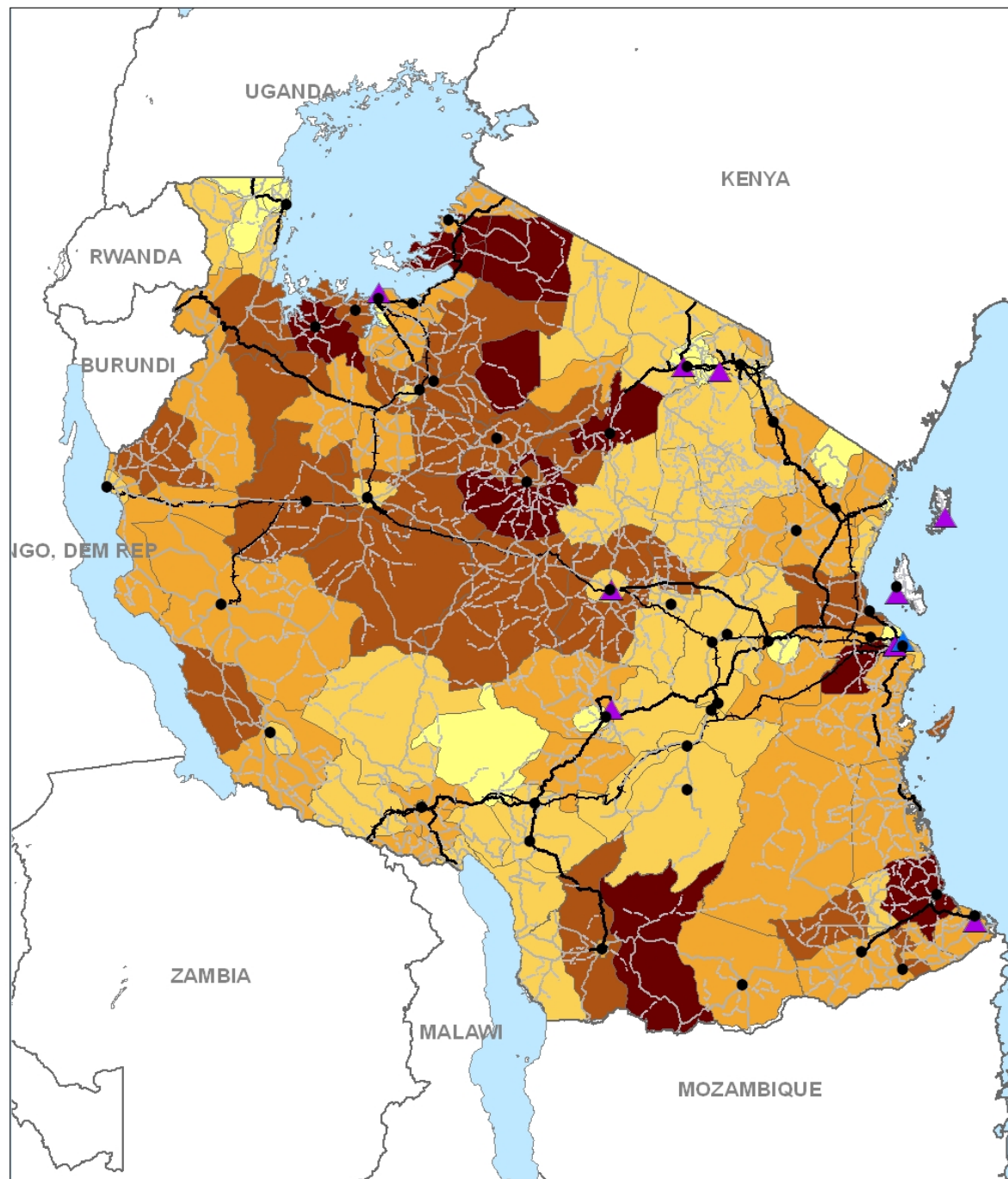
Sources: DCW/VMAP0, AICD First Order Mapping of Primary and Secondary Road Network, GRUMP, DAFIF, WPI.

Transportation Network & Poverty

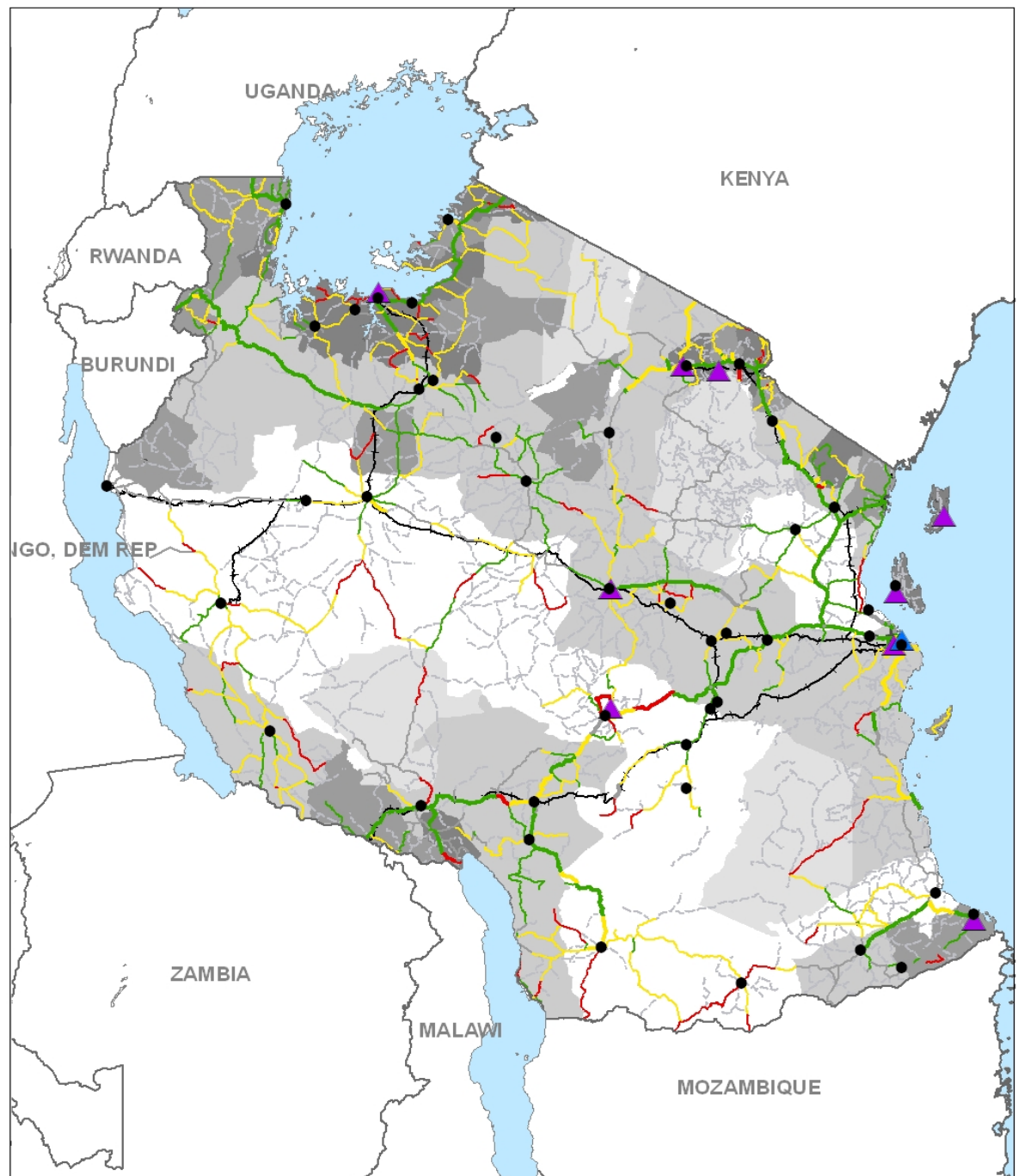
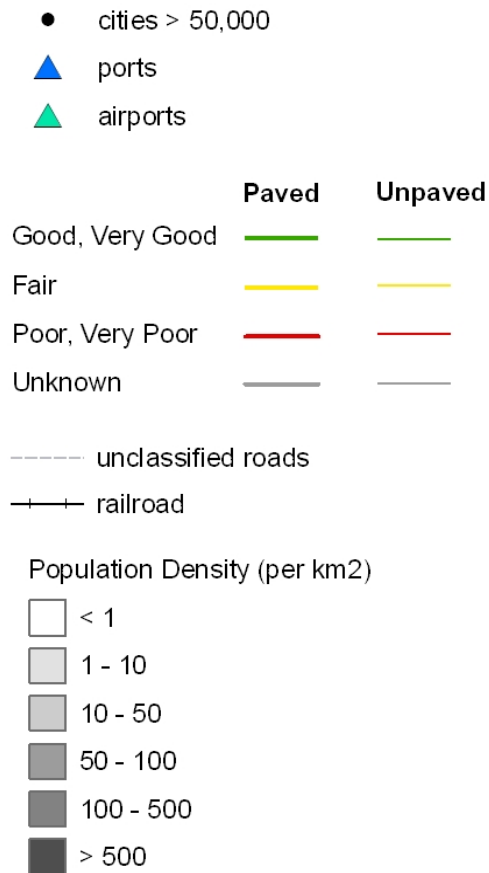
- cities > 50,000
- ▲ ports
- ▲ airports
- paved
- gravel, earth
- - - tracks, other
- + + + railroad

Population Living in Poverty (%)

- < 20
- 20 - 30
- 30 - 40
- 40 - 50
- > 50



Transportation Network & Population



Sources: DCW/VMAP0, AICD First Order Mapping of Primary and Secondary Road Network, GRUMP, DAFIF, WPI.

Power Network

Power Plants (capacity > 10 mw)

Operational

Planned, Under Construction

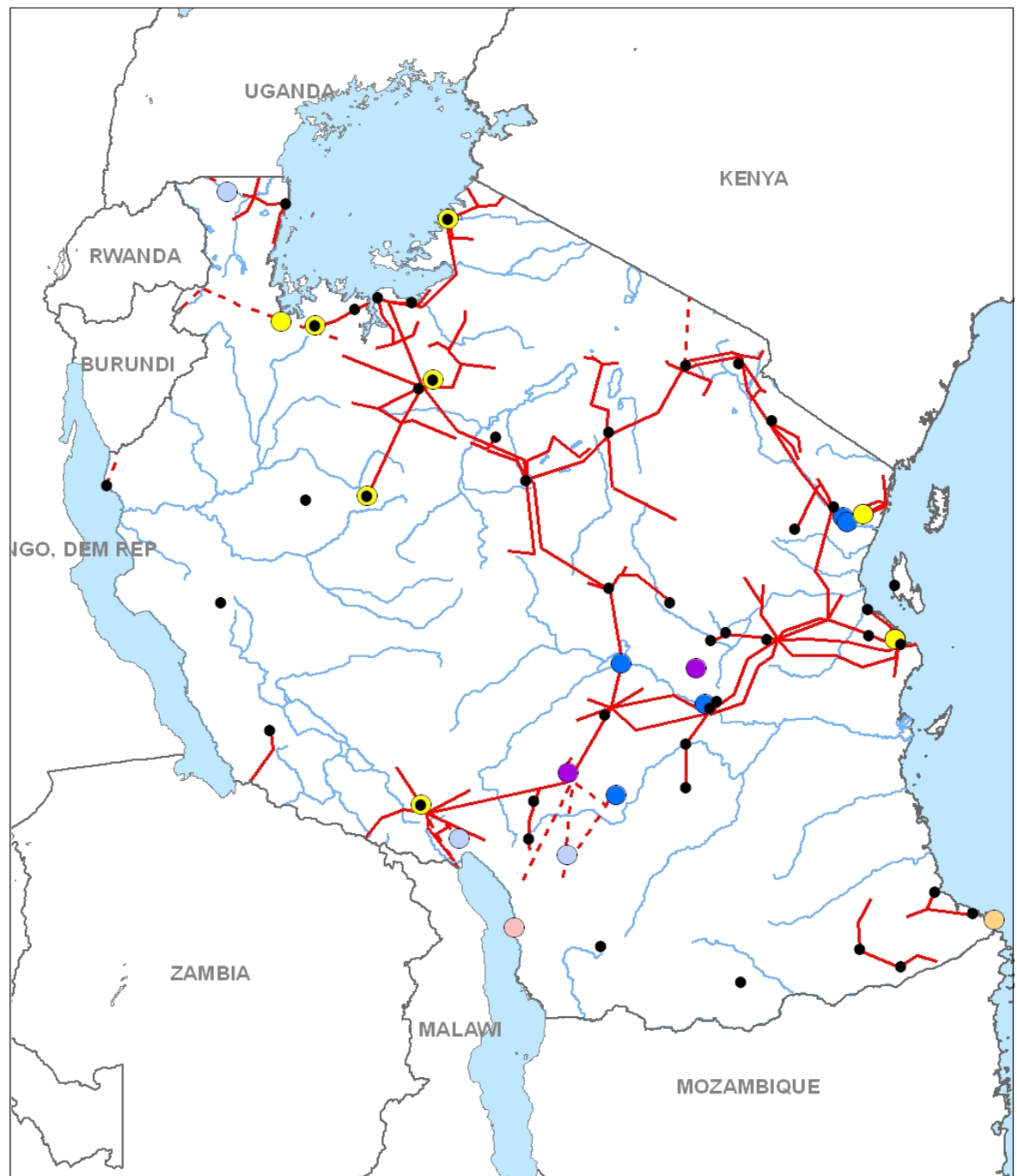
- | | |
|------------|------------|
| ● coal | ● coal |
| ● gas | ● gas |
| ● fuel oil | ● fuel oil |
| ● hydro | ● hydro |
| ● other | ● other |

— Transmission Line - Existing

- - - Transmission Lines - Proposed

● cities > 50,000

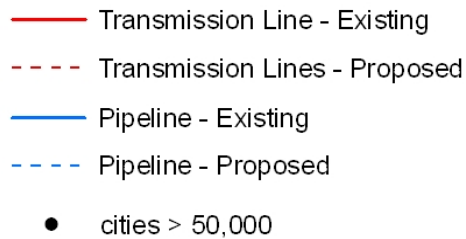
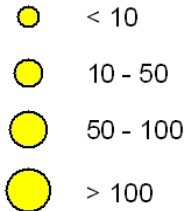
— major rivers



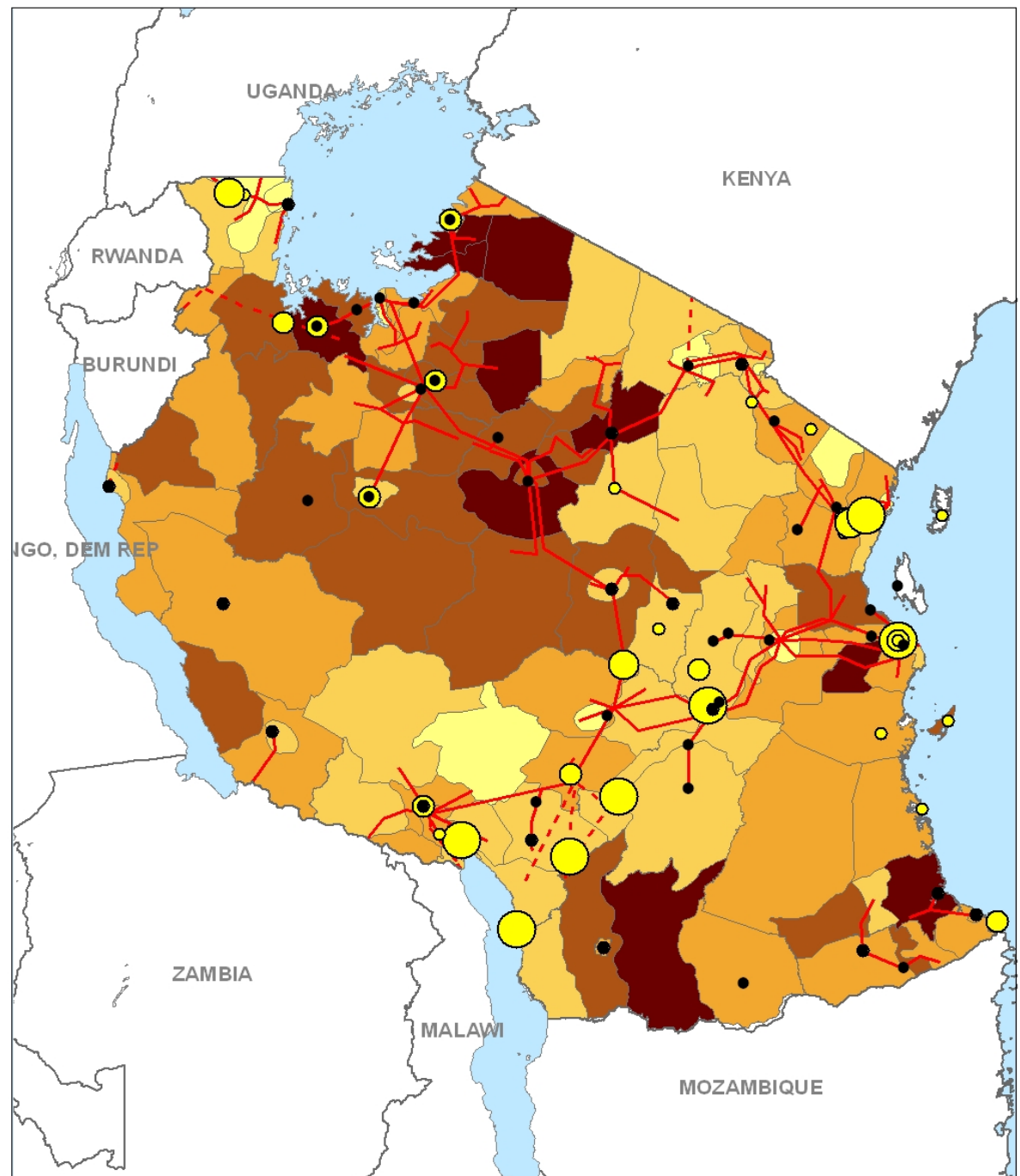
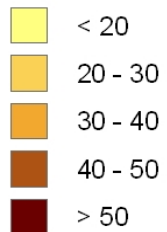
Source: GRUMP, PLATTS, RWDB II, WB map archive.
Note: National grid layer may be incomplete.

Power Network & Poverty

Existing Power Plants - Capacity (MW)



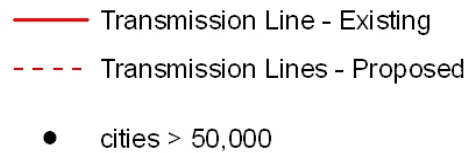
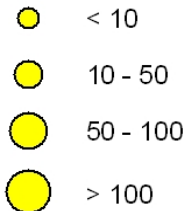
Population Living in Poverty (%)



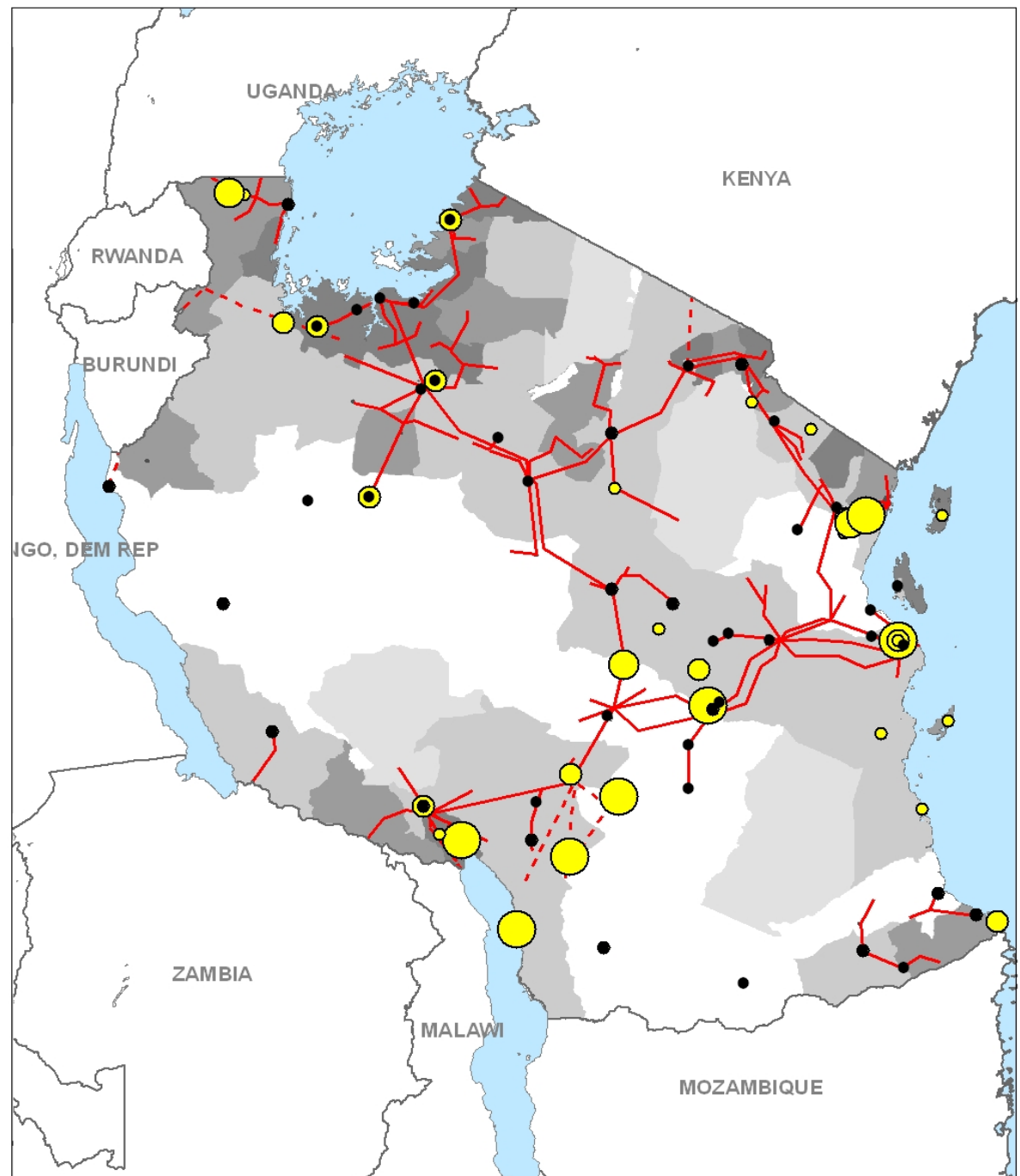
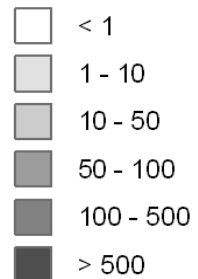
Sources: DCW/VMAP0, Michelin 1:4 mill map series, GRUMP, DAFIF, WPI, Tanzania Poverty and Human Development Report, 2005.

Power Network & Population






Power Plants - Capacity (MW)









Population Density (per km2)

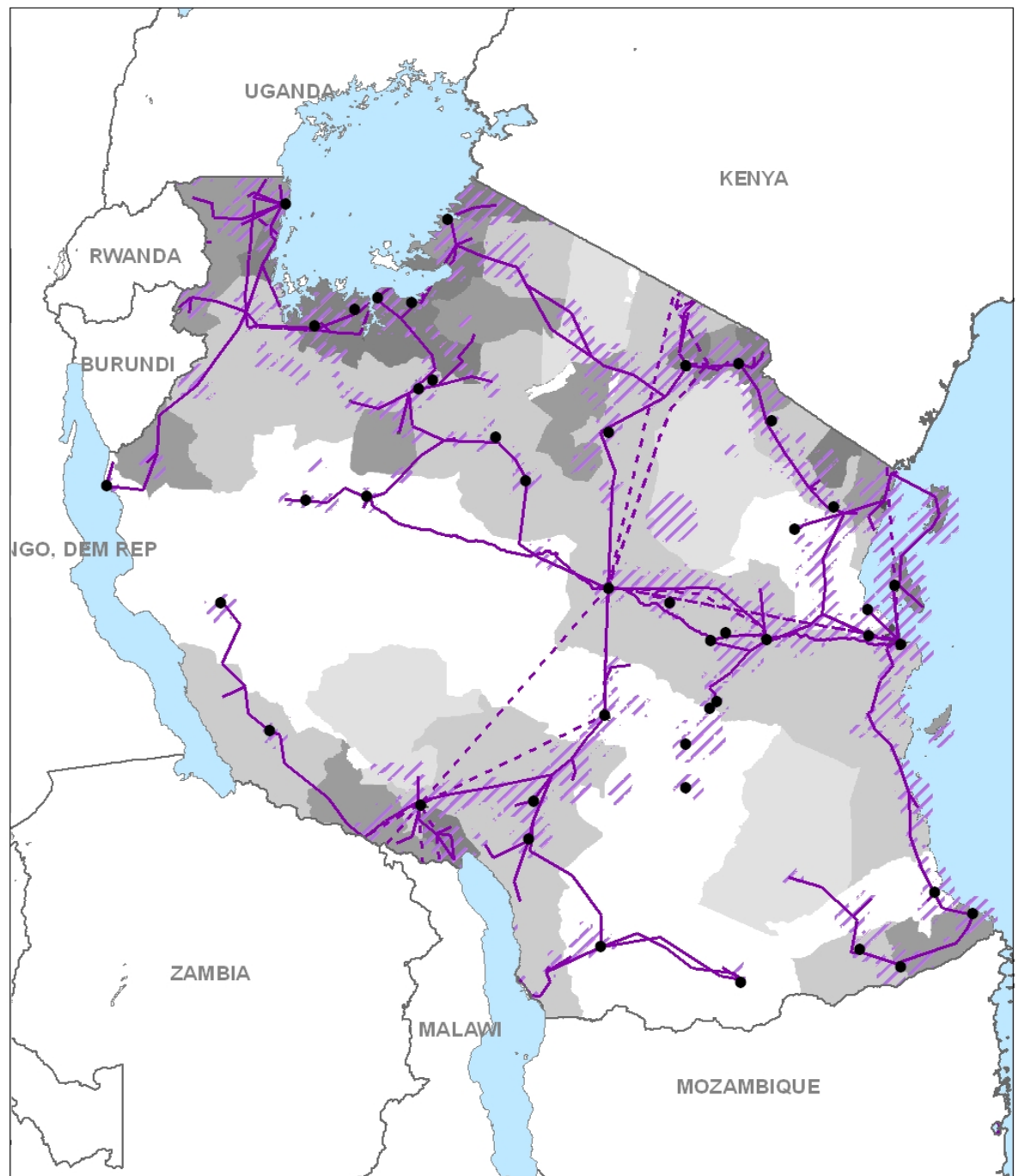


ICT Infrastructure

-  GSM coverage
-  International Gateways
-  National Backbone - Existing
-  National Backbone - Planned
-  cities > 50,000

Population Density (per km²)

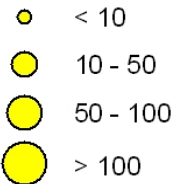
-  < 1
-  1 - 10
-  10 - 50
-  50 - 100
-  100 - 500
-  > 500



Source: GRUMP, ECOWAS ICT Atlas 2007 update,
GSM Association/Europa Technologies
Note: National backbone layer may be incomplete

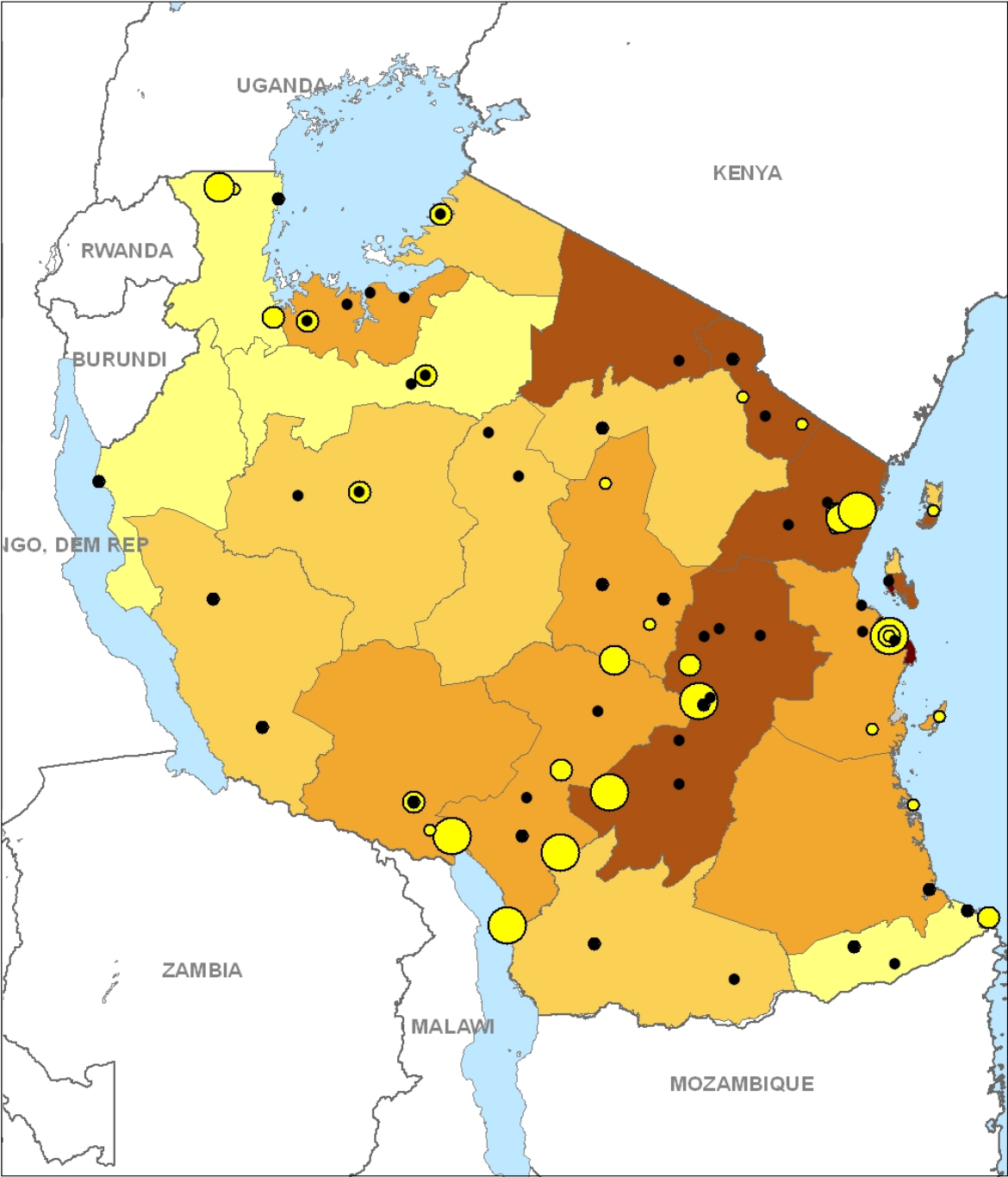
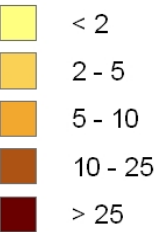
Access to Services: Electricity

Power Plants (capacity in MW)

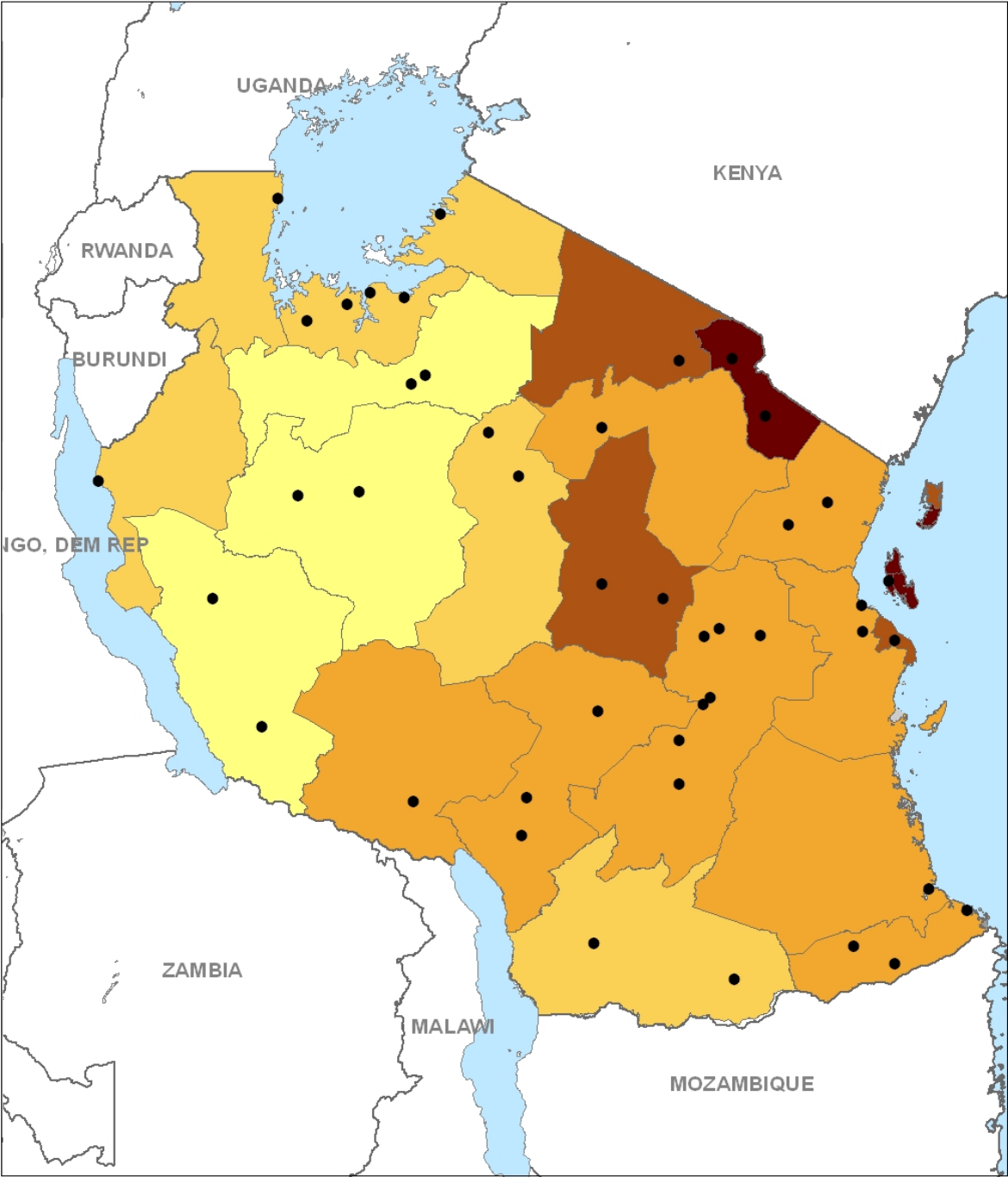


• cities > 50,000

Uses Electricity for Lighting (% HH)



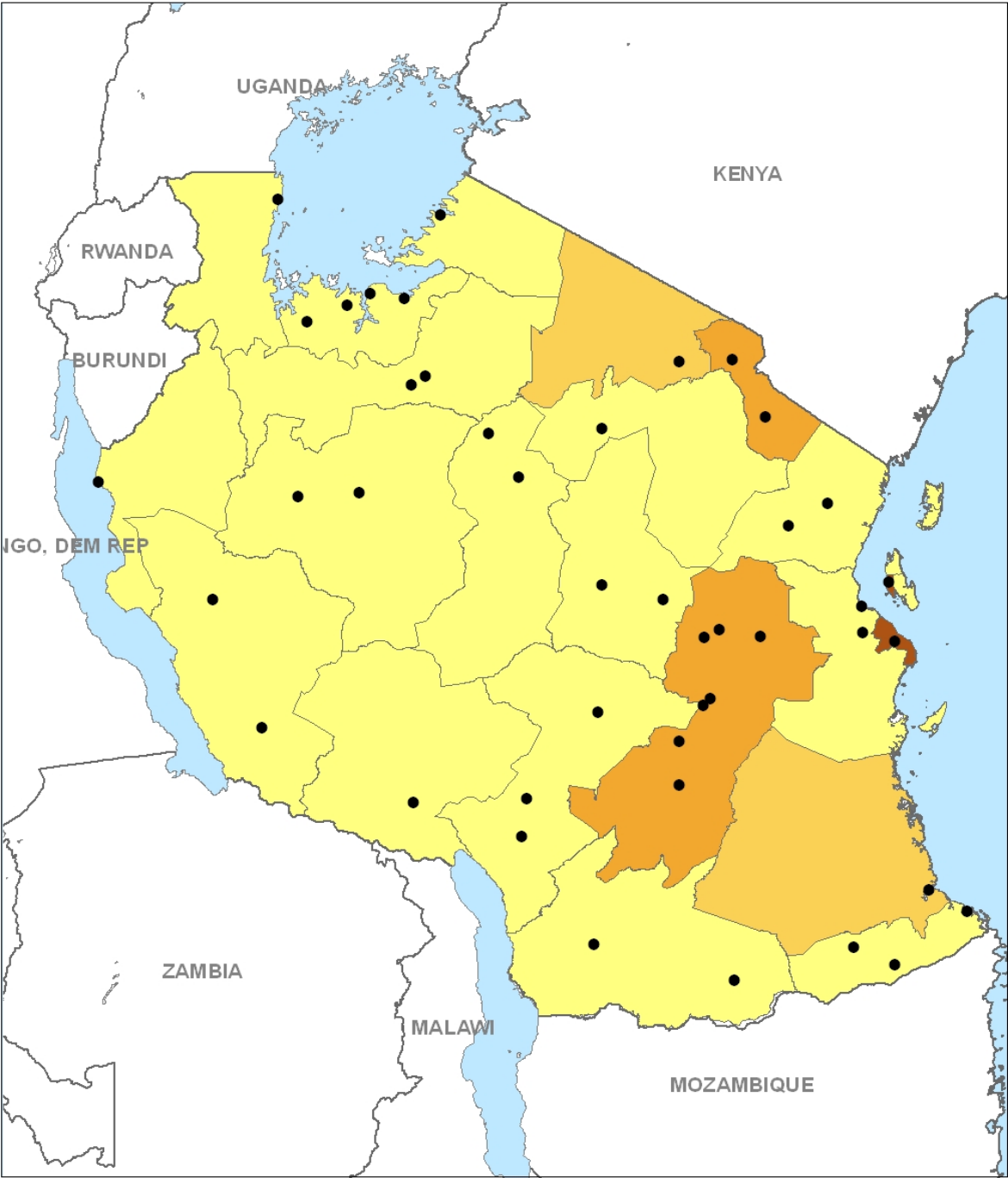
Access to Services:
Water



Source: GRUMP, PLATTS, Tanzania 2004 DHS Survey
Notes: Cluster locations not available

Access to Services:
Sanitation

- cities > 50,000
- Has Flush Toilet (% HH)
 - < 2
 - 2 - 5
 - 5 - 10
 - 10 - 25
 - > 25
- DHS clusters

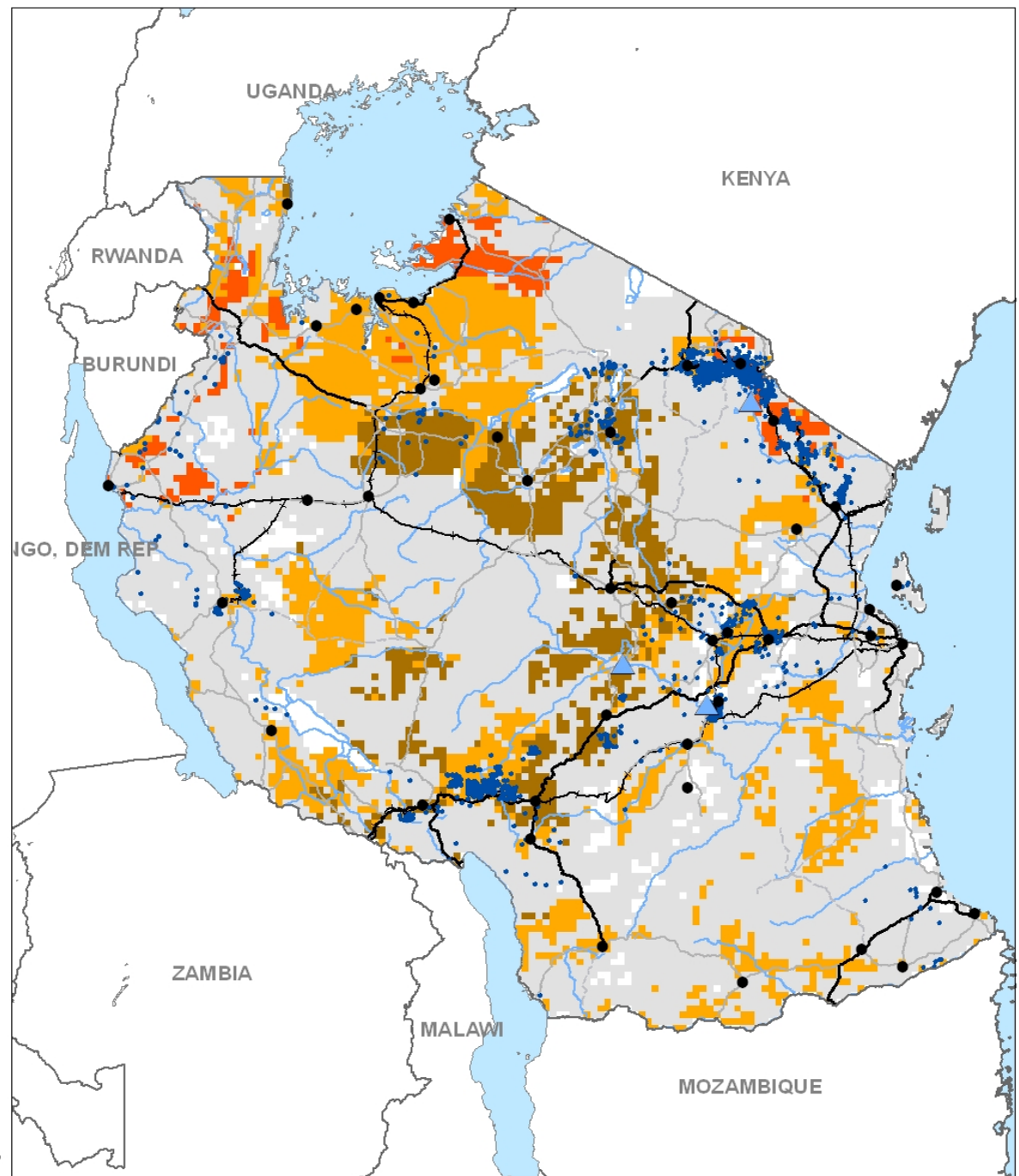


Source: GRUMP, Tanzania 2004 DHS Survey
Notes: Cluster locations not available

Crop Production Areas

- irrigated area
1 Dot = 100 ha
- ▲ dams
- major rivers
- cities > 50,000
- +— railroad
- paved
- unpaved
- tracks, other

- Dominant Crop in Area
- cereal
 - other food crops
 - pulse
 - common export
 - < 10% cropland



Sources: IFPRI, FAO, DCW/VMAP0.

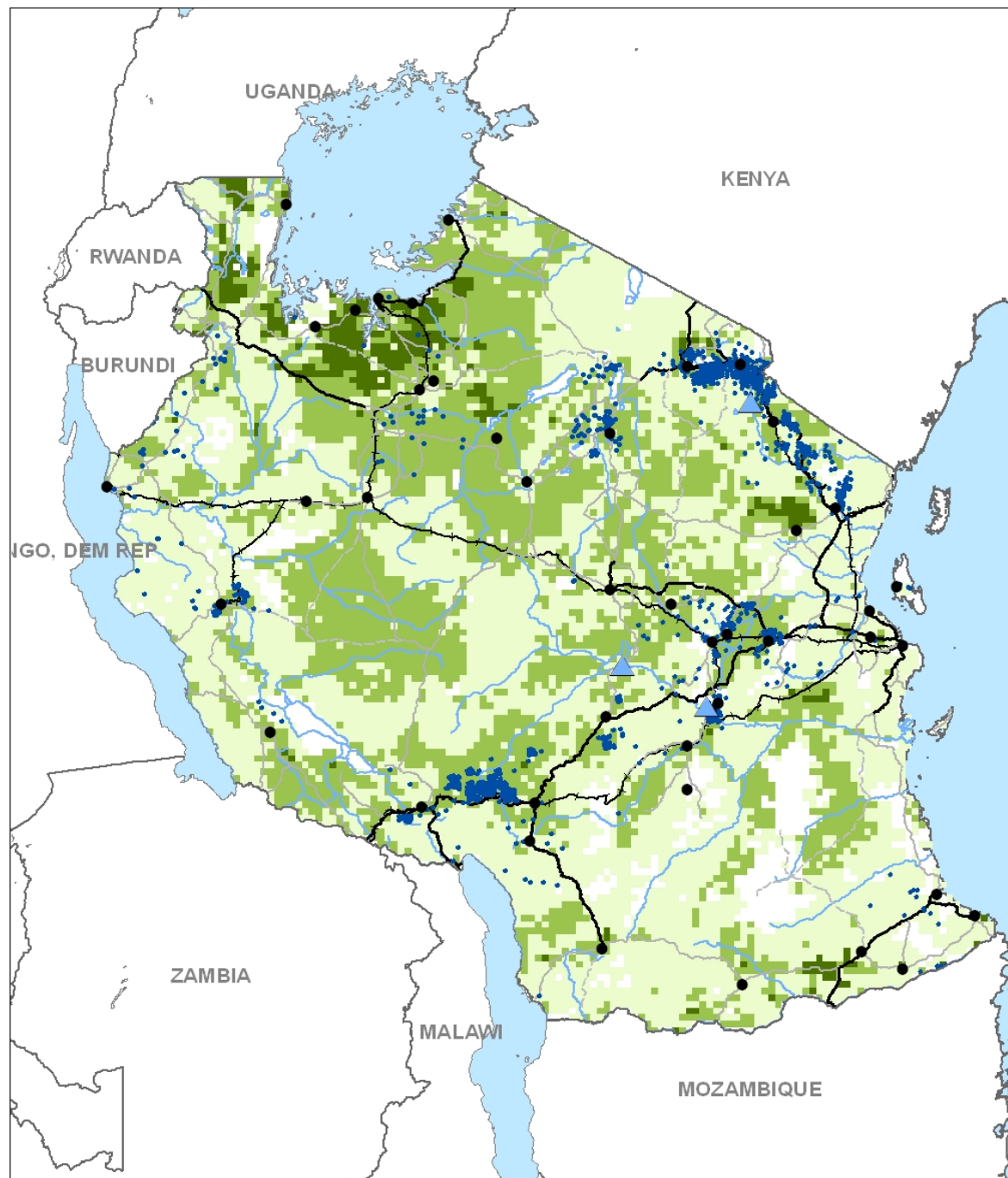
Note: common export category includes sugar, coffee, cotton, other fibres, oils, groundnuts

Agricultural Production Potential Export Value

- irrigated area
1 Dot = 100 ha
- ▲ dams
- major rivers
- cities > 50,000
- +— railroad
- paved, improved
- unpaved
- tracks, other

Crop Value Class

- Low
- Medium
- High



Sources: IFPRI, FAO, DCW/VMAP0.

Note: potential export values calculated using a mean export price for each crop type and aggregating by grid cell

Mineral Resources & Mining

XXXX petroleum

Major Commodity

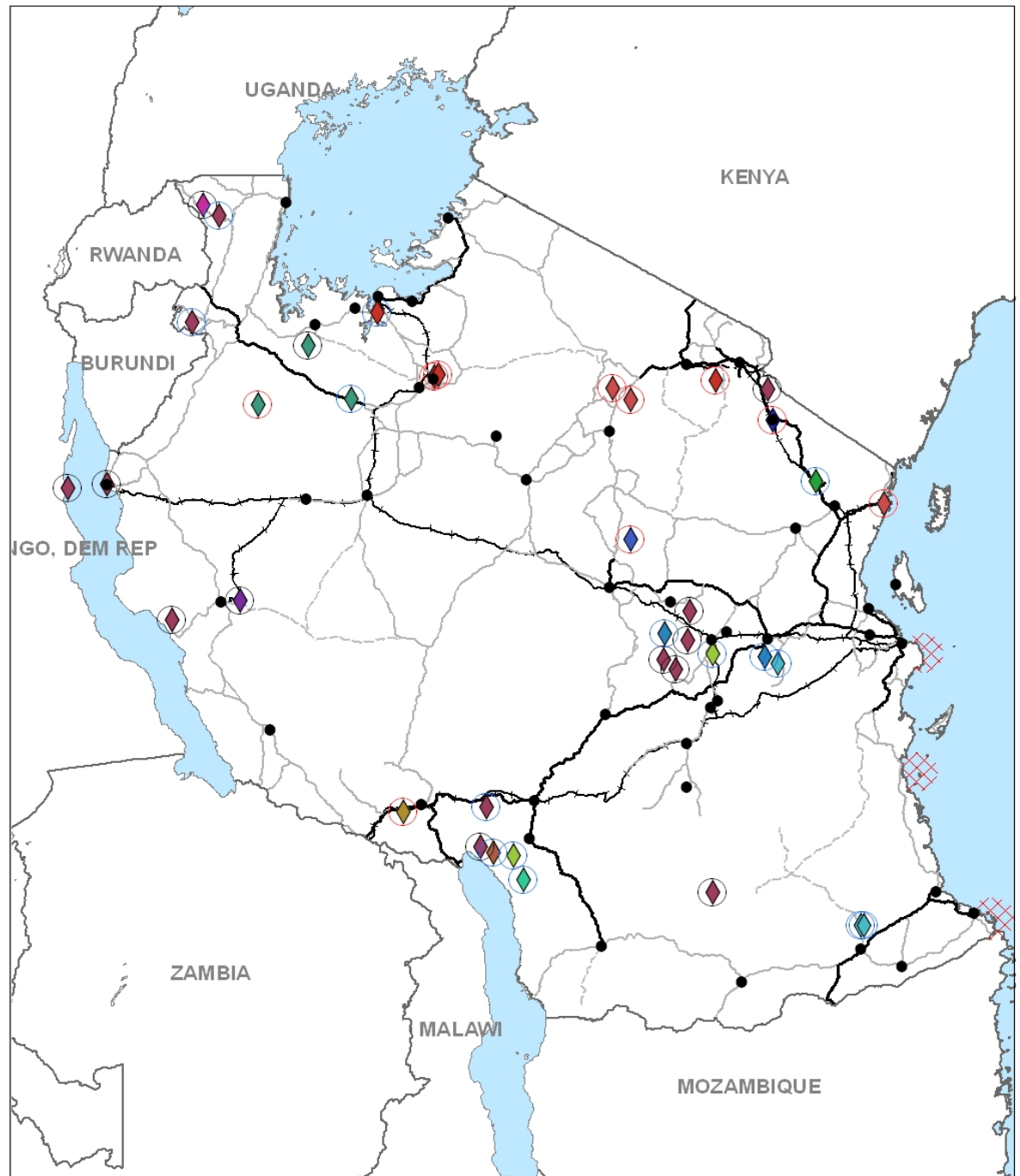
- | | |
|-------------|-------------------------|
| ◆ Aluminum | ◆ Niobium (Columbium) |
| ◆ Copper | ◆ PGE |
| ◆ Gemstone | ◆ Phosphorus-Phosphates |
| ◆ Gold | ◆ Silica |
| ◆ Graphite | ◆ Silver |
| ◆ Iron | ◆ Tin |
| ◆ Magnesite | ◆ Vanadium |
| ◆ Manganese | |

Status

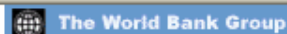
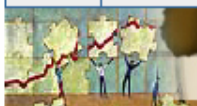
- producer
 ○ prospect, occurrence
 ○ past producer, unknown

● cities > 50,000

- +— railroad
 — paved, improved
 — unpaved
 - - - tracks, other



Source: USGS, PETRODATA, DCW/VMAP0, GRUMP.
 Note: Sites mapped by first major commodity only, other major, minor and trace commodities are not displayed.

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- ☐ Africa Development Indicator 2007 (Availability)
- ☐ Africa Development Indicators 2008/09
- ☐ Africa Development Indicators Availability 2008/09
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- ☐ Africa Development Indicator (SQL 2005)

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Select Database**Select Variables****Format Report**[Country](#) | [Series](#) | [Time](#)**List****Classification****Economic_CPAI**

- ▶ Low Income, Fragile
- ▶ Low Income, Non-Fragile
- ▶ Middle Income
- ▶ Oil Exporting

Geographic**Income****Lending**Search

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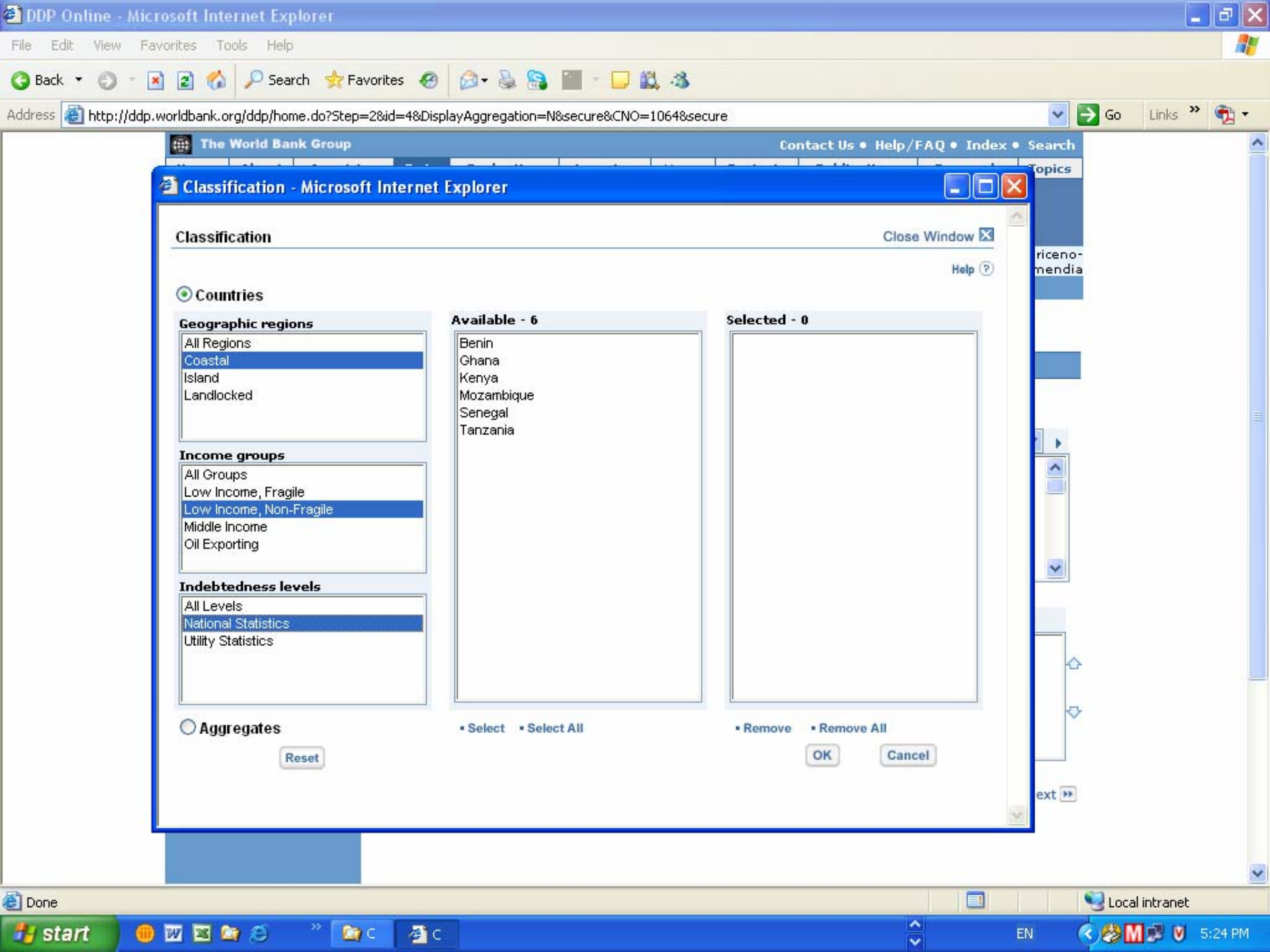
From [Benin, S - Zambia](#), 

Benin, SBEE
Burkina Faso, Sonabel
Cameroon, AES SONEL
Cape Verde, Electra
Chad, STEE
Congo DRC, SNEL
Cote d'Ivoire, CIE

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Select Database**Select Variables****Format Report****Country** | **Series** | Time☒ **Policies**

- ▶ General Information
- ☒ Institutional
- ☒ Performance

☒ **Sectors**Search

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From

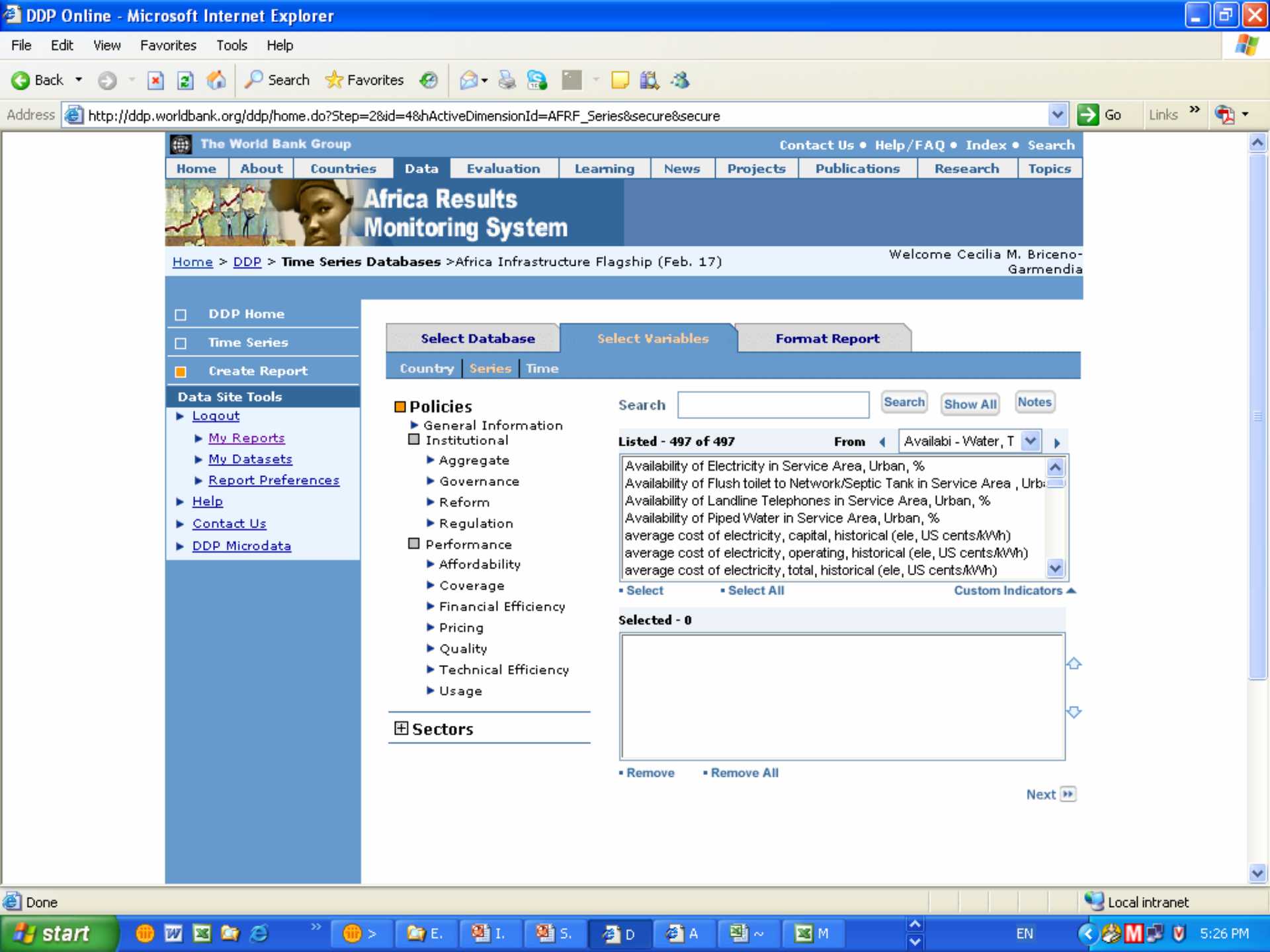
Availabi - Water, T

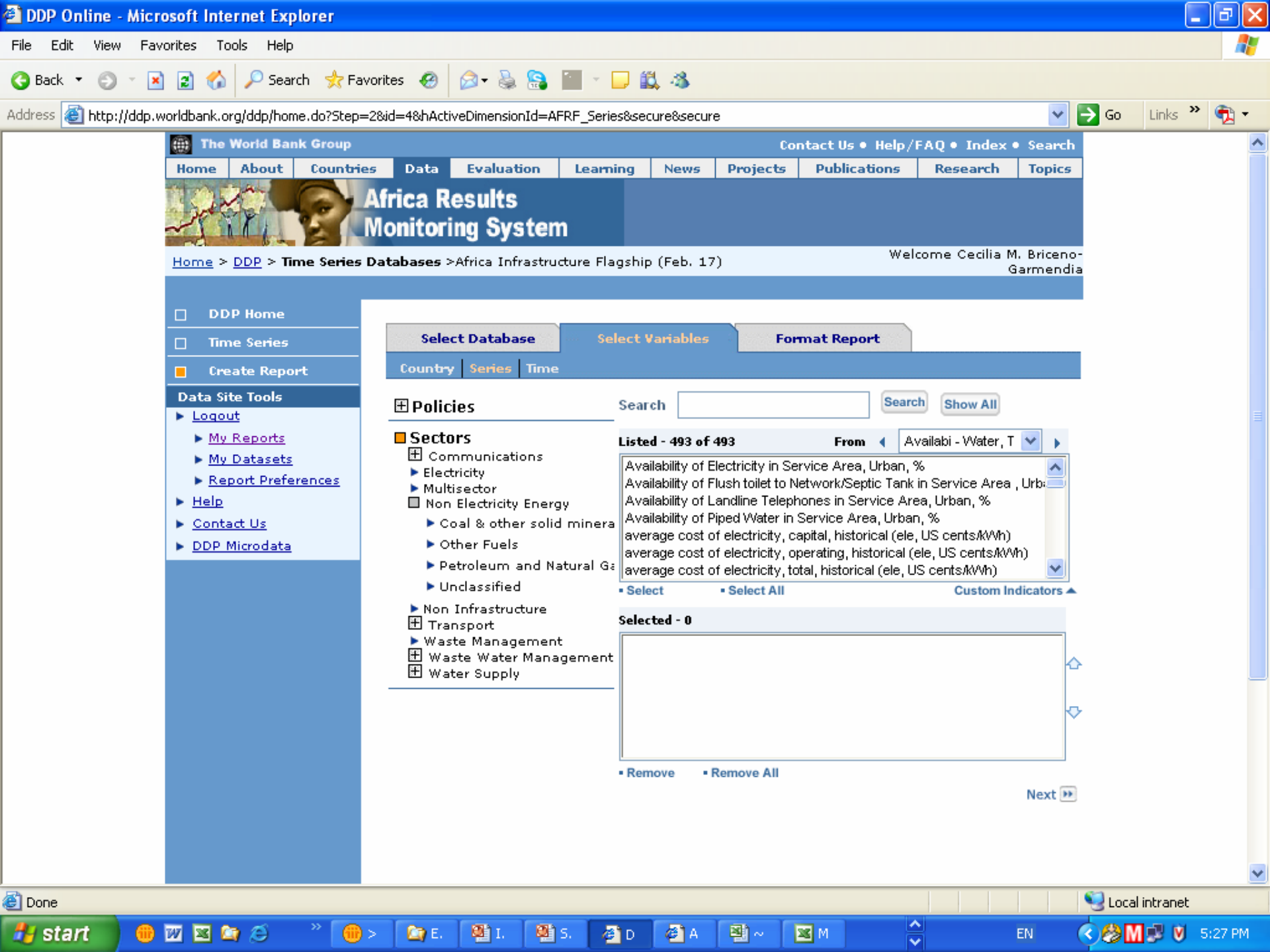
Availability of Electricity in Service Area, Urban, %
Availability of Flush toilet to Network/Septic Tank in Service Area, Urban, %
Availability of Landline Telephones in Service Area, Urban, %
Availability of Piped Water in Service Area, Urban, %
average cost of electricity, capital, historical (ele, US cents/KWh)
average cost of electricity, operating, historical (ele, US cents/KWh)
average cost of electricity, total, historical (ele, US cents/KWh)

• [Select](#)• [Select All](#)[Custom Indicators](#) ▲

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Status of AICD Phase II

Status of Phase II

- Phase II well underway increasing coverage to rest of SSA with North Africa benchmarking
- Investment needs studies close to completion already
 - Expected April 1009
- Most sector reviews at a relatively advanced stage (roads, ports, rail, air, irrigation, ICT)
 - Expected June 2009
- Fiscal costs plus power and water sector reviews will take longer
 - Expected end 2009
- Phase I reports updated with Phase II data retaining same overall structure

Budget Statement for Phase II

US\$m	Grant	Disbursed	Committed	Uncommitted
WB Supervision	0.20			
DFID	1.03			
EC	0.37			
TOTAL MDTF	1.40	0.50	0.68	0.22
PPIAF	0.48	0.14	0.14	0.20
Total Trust Fund	1.48	0.64	0.82	0.42

Outreach and dissemination costs

US\$'000s	Unit	Unit cost	Total
A. Publication			220
Printing of 'Flagship Report'	2000		50
Printing of French Flagship Report'			50
Sectoral Volumes	4	30	120
B. Dissemination			370
Country Events			200
Local Venues Africa Road Show	12	5	60
Presenters Africa Road Show	12	10	120
Materials	1680	0.4	20
Website			50
Country reports	24	5	120
C. Outstanding Data Collection – Phase II Data Collection			350
<u>Grand Total</u>			<u>970</u>

Budget Deficit Table

Total Uncommitted Phase I, Ph II	0.59
(-) Outreach and Dissemination	0.97
Current Balance	(0.42)
Outstanding Pledges	0.48

Outstanding Pledges for Phase II

- EC: three installments, first paid, second requested, third to come
- France: Phase II contribution pledged but not yet mobilized decision pending Mar 09
- Germany: Indicated interest in Phase II AICD team invited to submit proposal



Long-term Sustainability

Beyond Phase II

- On-going collaboration AfDB Statistical Department, WB Statistical Department and AICD team
 - Transferring baseline database of Africa Infrastructure Indicators
 - Mainstreaming household surveys as a source for INF data
 - Building sustainable system for data collection
- Using AICD to influence decision making
 - Mapping WBG interventions to address “missing links” in Africa’s regional infrastructure networks

Transferring baseline database

	Timeframe	Status
Definition of DDP hierarchies	January '09	Done
DDP Uploading of AICD Phase I	March '09	On-going Water, Energy, ICT and HH done
Final validation and debugging	Mid April '09	
Final transfer of DDP data and hierarchies	End April '09	AfDB installed DP platf'm in coordination with WB-Statistics (DECDG) Training on-going

Mainstreaming household surveys as a source of infrastructure data

- Transfer of AICD Guidelines
- Build AfDB capacity using DECDG expertise and the International Household Survey Network umbrella

	Timeframe	Status
Preparation of TORs for a full-time AfDB HH Survey Specialist (long-term consultant)	March '09	Done
Identification and hire of lon-term consultant (by AfDB with support of WB-DECDG)	t.b.d.	On-going
Assignment of HH expert at WB headquarters (3 to 4 weeks)	t.b.d.	
Reallocation of consultant in Tunis	t.b.d.	

Building a sustainable system for data collection

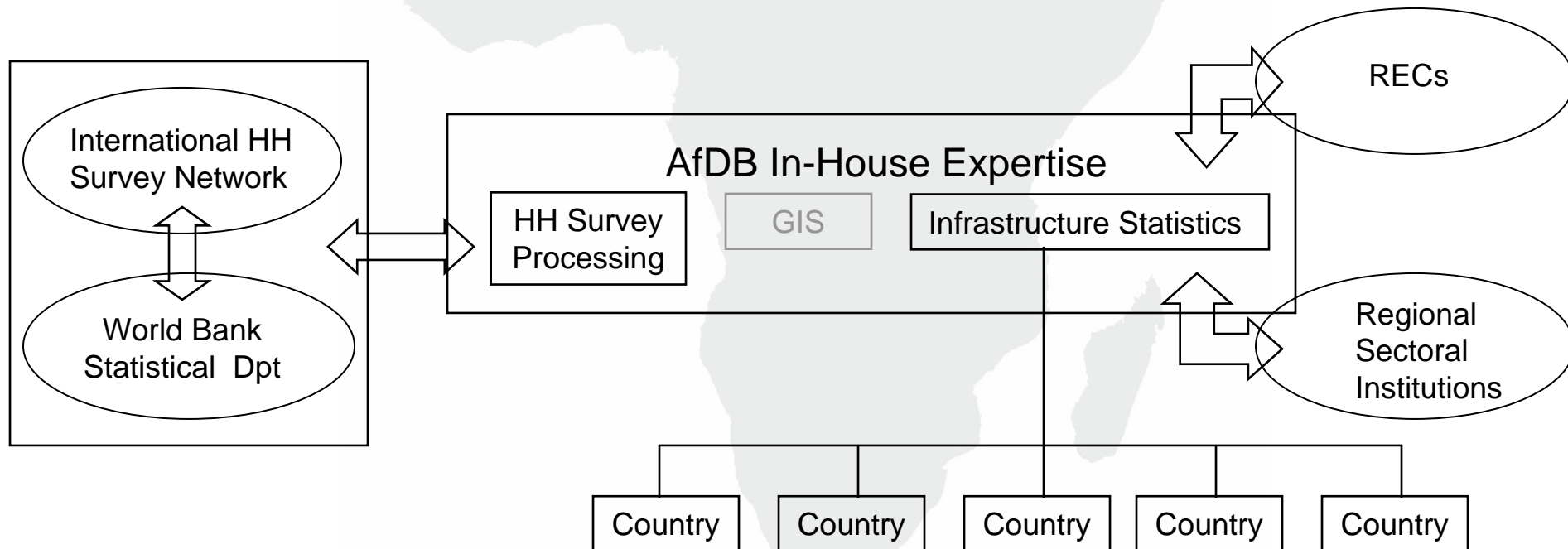
- Take advantage of AICD Phase II data collection for piloting data collection schemes
- Extend coverage of infrastructure database to include North African countries
- Build up in-house capacity at the AfDB and initiate roll out capacity building to RECs

	Timeframe	Status
Joint-revision of Manuals Fiscal, Power and WSS data collection	December '08	Done
Identification of consultants in the field for primary collection of fiscal, energy and WSS data	January '09 – September '09	On-going
Supervision and quality control of data collection	January '09 – December '09	
Uploading to DDP	As quality data becomes available	

Building a Sustainable Infrastructure Data System: Immediate Scheme

Short-term:

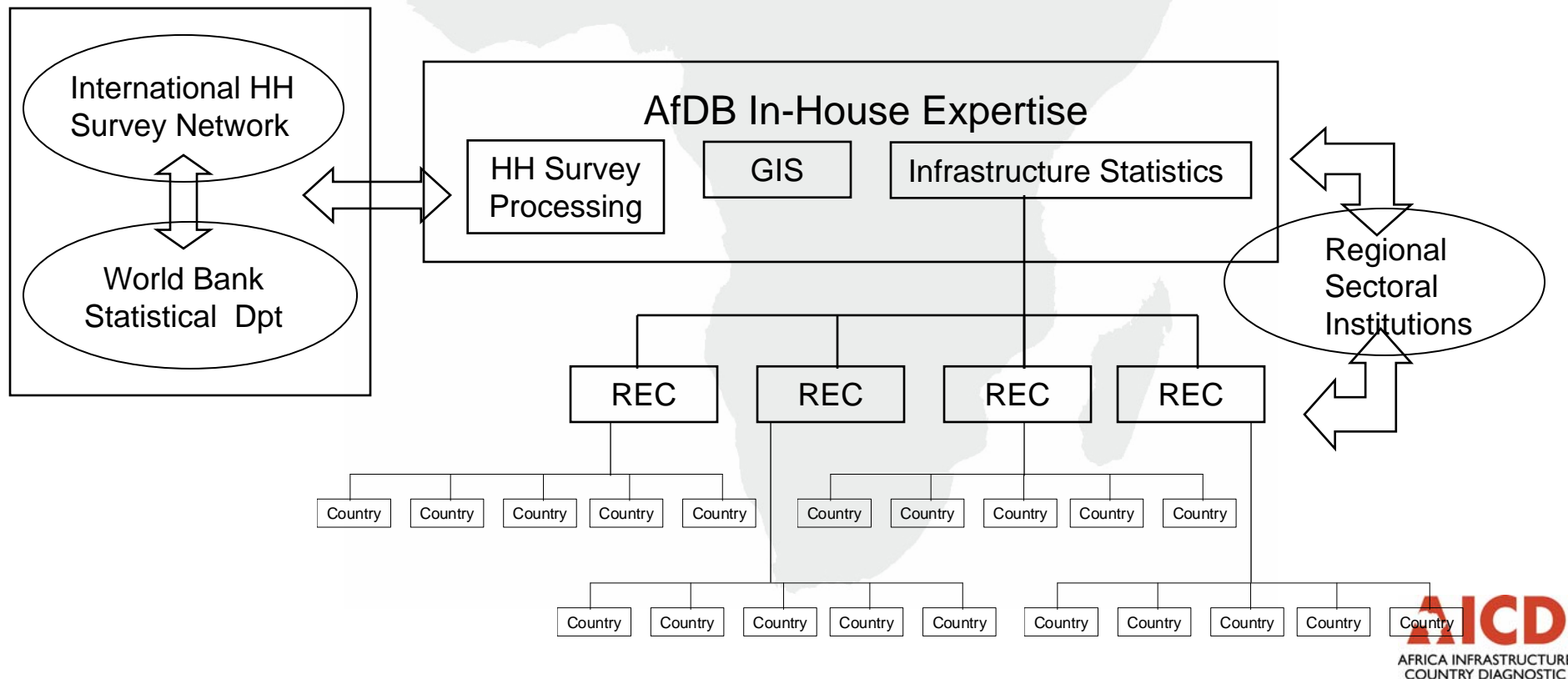
- AfDB statistical department: direct supervision of data collection and quality control
- RECS and REIs consultative bodies



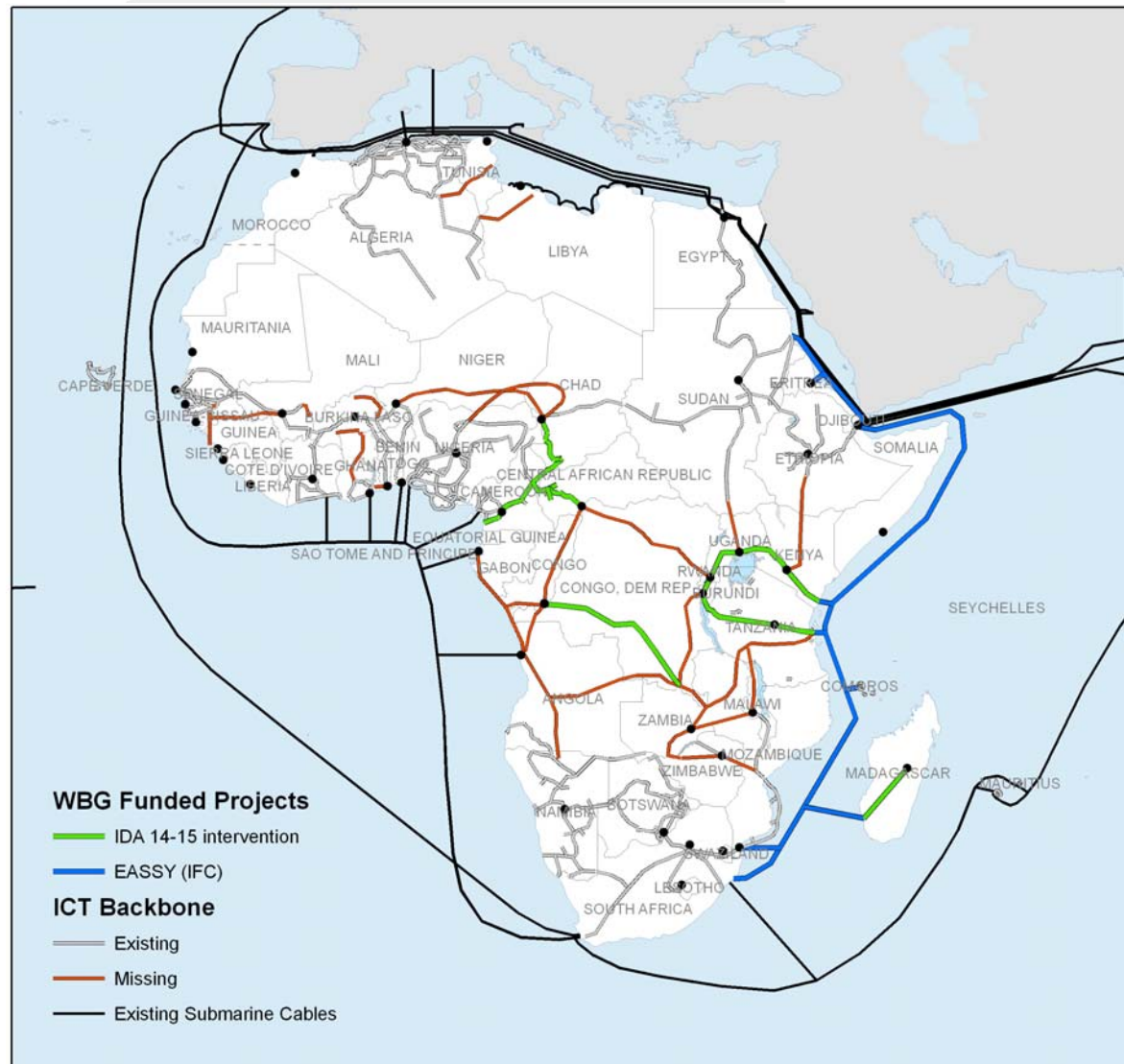
Building a Sustainable Infrastructure Data System: Steady State

Medium-term:

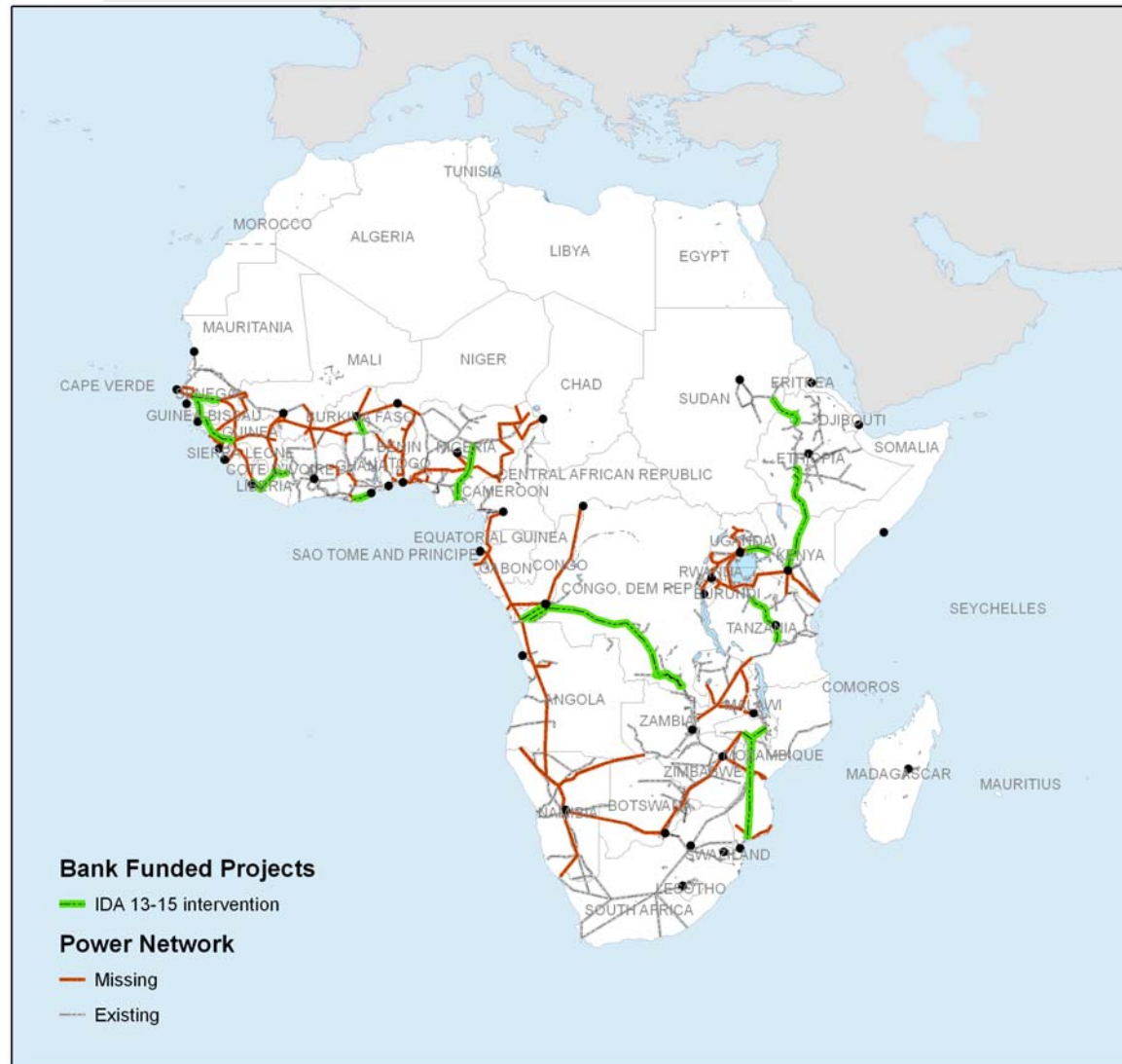
- AfDB statistical department: final quality control and dissemination
- RECs direct supervision of data collection and initial quality control
- REIs consultative bodies



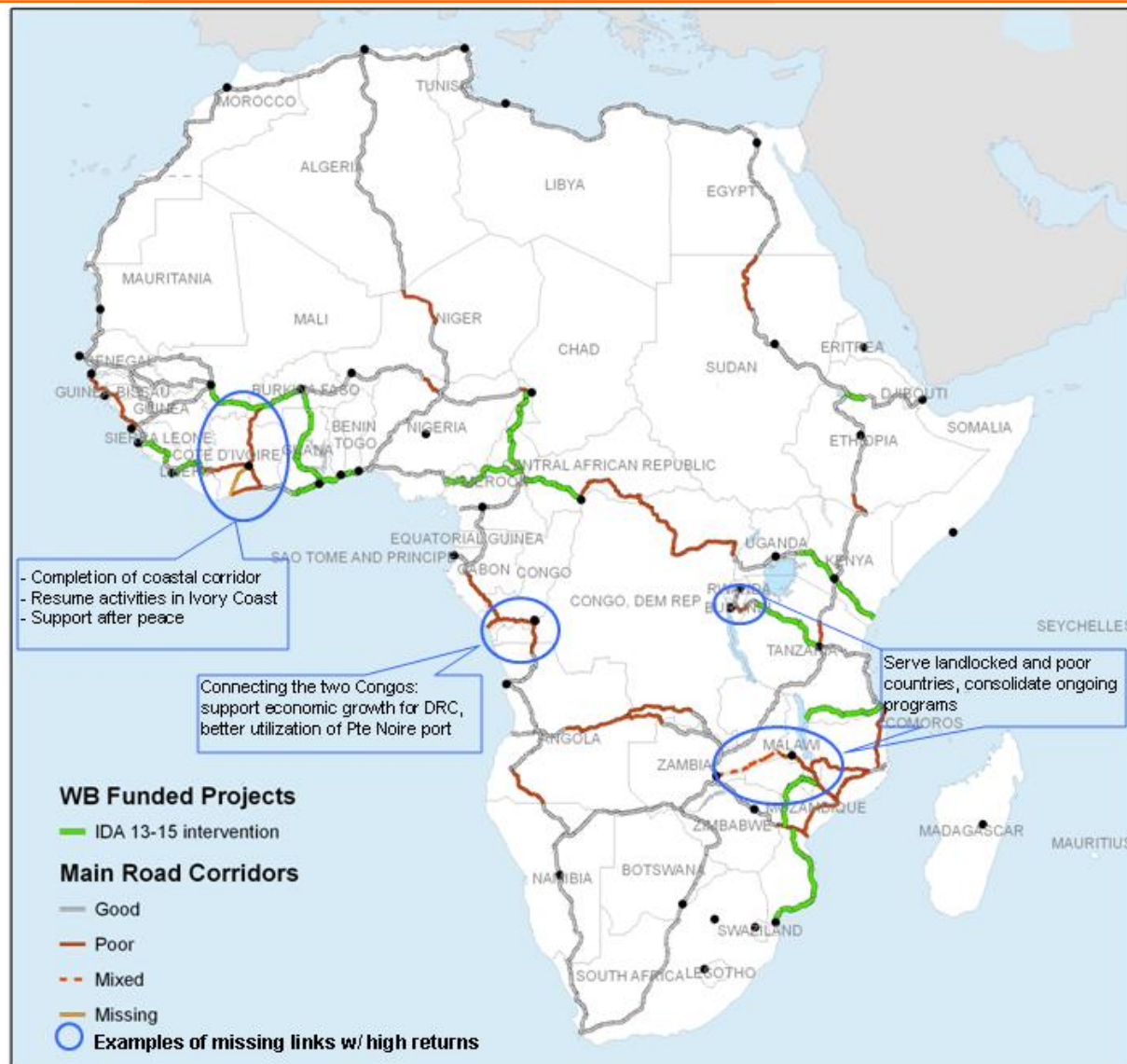
Tentative Africa's Regional ICT Network at End IDA-15 (June 2011)



Tentative Africa's Regional Power Network at End IDA-15 (June 2011)



Tentative Africa's Regional Transport Network at End IDA-15 (June 2011)



Issues for Discussion

- Launching of Flagship in Africa
 - Date and Location (RSA?)
- Involving stakeholders in dissemination
 - Train the trainers
- Pending outstanding pledges
- Building up data sustainability
 - Role of AfDB vis-a-vis other agencies
- Using AICD:
 - Sharing 'missing links' maps with ICA for further update
 - Repackaging AICD results for PIDA immediate benefit