Lusaka Roundtable
27-28 November 2007

Overview of the water and sanitation sector and private sector involvement in selected African countries

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Outline

I. Performance of the water and sanitation sector
   Access
   Continuity of service
   Operational performance

II. Achieving the Millennium Development Goals
   On track?
   The cost

III. Private sector participation
   International
   Local

IV. Institutional settings
   Regulatory agencies
   Corporatisation and decentralisation
I. Performance of the water and sanitation sector

Access

Urban water access

In thousand inhabitants

No access  Non household connection  Household connection
I. Performance of the water and sanitation sector
Access
Urban sanitation access

In thousand inhabitants
I. Performance of the water and sanitation sector

Access

Rural water access

In thousand inhabitants

- No access
- Non household connection
- Household connection
I. Performance of the water and sanitation sector

Access

Rural sanitation access

In thousand inhabitants
## I. Performance of the water and sanitation sector

### Continuity of service

<table>
<thead>
<tr>
<th>Country</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Burkina Faso</td>
<td>No.</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>No. 12 hours per day on average.</td>
</tr>
<tr>
<td>Ghana</td>
<td>No.</td>
</tr>
<tr>
<td>Kenya</td>
<td>Not everywhere. Continuous in Nyeri and 19 hours per day in Mombasa.</td>
</tr>
<tr>
<td>Mali</td>
<td>No.</td>
</tr>
<tr>
<td>Nigeria</td>
<td>No, 4 hours per day in Abakaliki, 16 in Osogbo.</td>
</tr>
<tr>
<td>Senegal</td>
<td>Yes in Dakar.</td>
</tr>
<tr>
<td>South Africa</td>
<td>Yes, 98% of population receives continuous water supply.</td>
</tr>
<tr>
<td>Tanzania</td>
<td>No.</td>
</tr>
<tr>
<td>Uganda</td>
<td>No. 22 hours per day on average.</td>
</tr>
<tr>
<td>Zambia</td>
<td>No, 15 hours per day on average, 11 in Lusaka.</td>
</tr>
</tbody>
</table>
I. Performance of the water and sanitation sector

Continuity of service

Number of days per year that firms experience insufficient water supply

## I. Performance of the water and sanitation sector
### Operational performance

<table>
<thead>
<tr>
<th>Country</th>
<th>Unaccounted for water</th>
<th>Operating cost coverage ratio</th>
<th>Billing collection rate</th>
<th>Staff per 1000 connections</th>
</tr>
</thead>
<tbody>
<tr>
<td>Burkina Faso</td>
<td>Around 15%</td>
<td>135%</td>
<td>72%</td>
<td>9.7</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>Around 35%</td>
<td>80% on average</td>
<td>NA</td>
<td>11.5 in Awassa, 28 in Dire Dawa</td>
</tr>
<tr>
<td>Ghana</td>
<td>50% to 60%</td>
<td>NA</td>
<td>NA</td>
<td>Around 60</td>
</tr>
<tr>
<td>Kenya</td>
<td>Around 50%</td>
<td>94% in Mombasa.</td>
<td>54% in Nairobi</td>
<td>10.8 in Nyeri, 7.3 in Mombasa</td>
</tr>
<tr>
<td>Mali</td>
<td>Around 32%</td>
<td>135%</td>
<td>94%</td>
<td>5.9</td>
</tr>
<tr>
<td>Nigeria</td>
<td>Up to 83%</td>
<td>50% in Maiduguri, 77% in Kastina</td>
<td>As low as 43%</td>
<td>Up to 48</td>
</tr>
<tr>
<td>Senegal</td>
<td>Around 20%</td>
<td>158%</td>
<td>98%</td>
<td>3.2</td>
</tr>
<tr>
<td>South Africa</td>
<td>19.2% in Cape Town, 29% in Johannesburg</td>
<td>87% in Cape Town, 92% in Johannesburg</td>
<td>83% in Cape Town, 76% in Johannesburg</td>
<td>1.6 in Cape Town, 1.2 in Johannesburg</td>
</tr>
<tr>
<td>Tanzania</td>
<td>28% to 86%</td>
<td>100 to 110%</td>
<td>60% to 80%</td>
<td>Around 14</td>
</tr>
<tr>
<td>Uganda</td>
<td>Around 31%</td>
<td>Around 141%</td>
<td>Around 90%</td>
<td>Around 7</td>
</tr>
<tr>
<td>Zambia</td>
<td>48% on average</td>
<td>77% on average</td>
<td>77% on average</td>
<td>From 8 to 18</td>
</tr>
</tbody>
</table>
II. Achieving the Millennium Development Goals

On track?

- Senegal
- Burkina Faso
- Uganda
- Kenya
- Mozambique
- Ghana
- Zambia
- Mauritania

Source: Estimates by AfDB, EUWI, WSP and UNDP (2006)
II. Achieving the Millennium Development Goals
The cost

- Annual investment needs to reach the water-MDG as a percent of the GDP
- Annual investment needs to reach the sanitation-MDG as a percent of the GDP
- ODA received in 2005 for water and sanitation as a percent of the GDP
III. Private sector participation
International contracts
III. Private sector participation
International contracts

- Service contract
- Lease/Affermage contract
- Management contract
- BOT and assimilated contract
- Concession contract
- Terminated early
- Extended

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Countries:
- Guinea
- Central African Rep
- South Africa
- Gambia
- South Africa
- Kenya
- South Africa
- Senegal
- Gabon
- Mozambique
- Tanzania
- Uganda
- Burkina Faso
- Namibia
- Niger
- Mali
- Burkina Faso
- South Africa
- Mozambique
- South Africa
- Zambia
- Burkina Faso
- Uganda
- Tanzania
- Ghana
- Senegal
- South Africa
- Gambia
- Central African Rep

Years:
- 1989
- 1990
- 1991
- 1992
- 1993
- 1994
- 1995
- 1996
- 1997
- 1998
- 1999
- 2000
- 2001
- 2002
- 2003
- 2004
- 2005
- 2006
- 2007
- 2008
- 2009
- 2010

International contracts

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III. Private sector participation
Local involvement

- In Mali, 25 independent suppliers operate water networks in Bamako.
- In Mauritania, 404 management contracts have been awarded to independent operators in small towns.
- In Mozambique, about 200 independent providers operate small networks in Maputo and Matola.
- In Uganda, 13 local private operators provide services under short-term management contracts.
For the time being, several African countries have not set up independent regulatory agencies.

However, as in Senegal, regulation can be undertaken through performance contracts.
## IV. Institutional settings
### Corporatisation and decentralisation

<table>
<thead>
<tr>
<th>Country</th>
<th>Corporatisation of local operators</th>
<th>Centralisation versus decentralisation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Burkina Faso</td>
<td>Yes, ONEA is legally autonomous.</td>
<td>Still centralized.</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>Yes, AAWSA was established in 1971.</td>
<td>NA</td>
</tr>
<tr>
<td>Ghana</td>
<td>Yes, Ghana Water Company Limited was established in 1999.</td>
<td>NA</td>
</tr>
<tr>
<td>Kenya</td>
<td>Yes, some problems of independence.</td>
<td>Service provision has been recently devolved down to regional Water Services Boards.</td>
</tr>
<tr>
<td>Mozambique</td>
<td>No.</td>
<td>The government intends to withdraw from direct implementation of services.</td>
</tr>
<tr>
<td>Nigeria</td>
<td>Yes, some problems of independence.</td>
<td>Decentralized.</td>
</tr>
<tr>
<td>Senegal</td>
<td>Yes, SONES was created in 1995.</td>
<td>Centralized.</td>
</tr>
<tr>
<td>South Africa</td>
<td>Yes.</td>
<td>Decentralisation is not fully achieved yet.</td>
</tr>
<tr>
<td>Tanzania</td>
<td>Yes, 19 Urban Water and Sewerage Authorities were established in 1998.</td>
<td>Decentralisation in 1998.</td>
</tr>
<tr>
<td>Uganda</td>
<td>Yes.</td>
<td>Centralized planning. Management of water services is the responsibility of town councils.</td>
</tr>
<tr>
<td>Zambia</td>
<td>Yes, 10 commercial utilities were created in 2000.</td>
<td>Decentralisation in 1997</td>
</tr>
</tbody>
</table>
Thank You