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| 1. CAS Data | |
| Country: The Federal Democratic Republic of Ethiopia | |
| CAS Year: FY08 | CAS Period: FY08 – FY12 |
| CASCR Review Period: FY08 - FY12 | Date of this review: September 14, 2012 |

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| 2. Executive Summary |
| <p>i. This review examines the implementation of the Ethiopia Country Assistance Strategy (CAS) of FY08 and the CAS Progress Report (CASPR) of FY11, and assesses the CAS Completion Report (CASCR). The CAS was not a joint IDA/IFC strategy.</p> <p>ii. The broad objective of the CAS was to help sustain the “dual take-off” of growth and basic services by supporting the implementation of key elements of the Plan for Accelerated and Sustained Development to End Poverty (PASDEP) framework. The strategy was organized under four pillars to be consistent with the PASDEP. Under Pillar 1, fostering economic growth, IDA sought to support macro-fiscal stability, sustainably accelerate the level and productivity of infrastructure investment, increase agricultural productivity, and strengthen the industry and services sectors. Under Pillar 2, improving access to and quality of basic service delivery, IDA pursued the objectives of improved access to/coverage of basic services, enhanced quality of basic services, and enhanced citizens’ voice to improve quality of basic services. Under Pillar 3, reducing vulnerability, IDA aimed to reduce exposure to chronic food insecurity and shocks, and address environmental degradation and population pressures. Under Pillar 4, fostering improved governance, objectives included improving government effectiveness and quality of public administration, and enhancing the accountability and responsiveness of government. The CASPR reiterated these objectives, and added a fifth pillar: increasing donor harmonization through the IDA-supported multi-donor program and mainstreaming gender in IDA supported programs.</p> <p>iii. The CASCR rates the overall outcome of IDA strategy for Ethiopia as <i>moderately satisfactory</i>. IEG is able to concur with the CASCR rating, although in its view the rating is very borderline. The CASCR rates IDA achievement against a narrowly defined set of outcome indicators, and IEG’s recognition of this provides the basis for its concurrence with the CASCR’s overall outcome rating. Nevertheless, in IEG’s judgment, several unaddressed policy imbalances, structural constraints and governance issues pose significant risks to the results of the IDA program and their sustainability.</p> <p>iv. Under Pillar 1, IDA support did not contribute appreciably to addressing the macro-fiscal imbalances that have accompanied the rapid growth and overheating of the economy in recent years. Public infrastructure investments have helped improve the country’s transport, power and communication networks. Agricultural production has increased, but productivity has not improved due to un-tackled structural issues including insecure land tenure, opaque input and output markets, limited access to finance, and a restrictive trade regime. Similarly, IDA interventions in support of private sector development have been scaled down and thus have not been able to contribute to measurable improvements in the climate for private business. Under Pillar 2, in varying degrees, access to basic services in education, health, water and sanitation have improved, although many of the improvements fell short of the CAS targets. Improvement in the quality of basic services is somewhat less evident, although the advances in grade completion rates and maternal and child</p> |

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health achievements provide some indications of progress. There is less evidence of enhanced citizens' voice in service quality improvement. Under Pillar 3, IDA funding and advice, together with that of bilateral donors, have allowed the extensive food aid programs to expand to their current size. Although widespread famines have been avoided, farmers remain vulnerable. The number of food-poor has increased and their reliance on food aid is as great as ever. Productive agriculture that is less vulnerable to drought has been constrained from developing by policy deficiencies. There is also little evidence that environmental degradation has been seriously tackled, although there has been some rehabilitation of watersheds. Under Pillar 4, the IDA program has helped improve the effectiveness of the government in delivering basic services and increasing infrastructure density, but results in improving governance, accountability and government responsiveness have been limited. Some of the citizen participation and budget transparency indicators have improved in project areas, but in the context of restrictive laws governing the media and civil society, there is little evidence that broader accountability or responsiveness to citizens has improved.

v. One major lesson from the CAS/CASPR/CASCR is that, going forward, it is important for IDA to take a broader view of sustainability and to adopt a long-term vision in its risk analysis. The very substantial scope and scale of IDA's program make it especially important that sustainability and risk considerations are not clouded by the country's apparent political and socioeconomic stability, and that IDA is able to factor in underlying imbalances, policy shortcomings, and tensions as integrally as possible, putting in place a comprehensive risk mitigation and management approach. Another lesson is that the results framework needs to be simpler, with outcome indicators that are more closely matched with the underlying strategic objectives.

3. WBG Strategy Summary

Overview of CAS Relevance:

Country Context:

1. Ethiopia entered the CAS period following four years of double-digit growth, and has maintained robust growth throughout the period, ranging from 10.8 percent in 2008 to 7.3 percent in 2011. As per capita income tripled from US\$130 to almost US\$400 between 2000 and 2011, the lives of most Ethiopians improved measurably and poverty headcount fell from 46 to 29.6 percent between 1995/96 and 2010/11. However, the rapid growth had been accompanied by several imbalances in the economy. Inflation fluctuated, going from 44 percent in 2008 to 8.1 percent in 2010 to 33 percent in 2011, and is projected at 22 percent in 2012. While global food price shocks have been a driver of the high inflations, inappropriate monetary policies exacerbated their impact. Foreign reserves fell to under two months of import coverage as a result of the foreign exchange sales by the central bank. The current account deficit stood at 6.4 percent of GDP in 2011 and is due to Ethiopia's large structural imbalance in merchandise trade. The government maintains tight control over media and civil society, while state presence in the economy remains pervasive. Many structural reforms have yet to be tackled and private sector investment remains low. In 2009, the IMF approved US\$235 million under a 14-month arrangement supported by the Exogenous Shocks Facility, of which some US\$121.4 million was disbursed.

2. The government's program during the CAS period was elaborated in two five-year plans: the 2005-2010 PASDEP and the 2010-2015 Growth and Transformation Plan (GTP). The broad thrust of the PASDEP was promoting rural growth, accelerating private sector growth in a modern economy to create employment and incomes, and strengthening public institutions to deliver services. Growth was a major focus, with particular emphasis on greater commercialization of agriculture and private sector development, and a scaling up of efforts to achieve the millennium development goals (MDGs). The government monitored the annual progress against the plan and incorporated the lessons into the GTP. Under the overall objective of sustaining rapid and broad-based growth, the GTP continues PASDEP's strategic priorities and consolidates them into seven pillars: sustaining rapid and equitable economic growth; maintaining agriculture as a major source of economic growth; creating conditions for the industry to play a key role in the economy; enhancing expansion and quality of infrastructure

development; enhancing expansion and quality of social development; building capacity and deepening good governance; and promoting gender and youth empowerment and equity.

Objectives of the WBG Strategy:

3. The broad objective of the CAS was to help sustain the “dual take-off” of growth and basic services by supporting the implementation of key elements of the PASDEP framework. The strategy was organized around four pillars to be consistent with PASDEP. Under Pillar 1, fostering economic growth, IDA sought to support macro-fiscal stability, sustainably accelerate the level and productivity of infrastructure investment, increase agricultural productivity, and strengthen industry and services sectors. Under Pillar 2, improving access to and quality of basic service delivery, IDA pursued the objectives of improved access/coverage of basic services, enhanced quality of basic services, and enhanced citizens’ voice to improve quality of basic services. Under Pillar 3, reducing vulnerability, IDA aimed to reduce exposure to chronic food insecurity and shocks, and address environmental degradation and population pressures. Under Pillar 4, fostering improved governance, objectives included improving government effectiveness and quality of public administration, and enhancing the accountability and responsiveness of government. The CASPR reiterated these objectives, and added a fifth pillar: increasing donor harmonization through IDA-supported multi-donor program and mainstreaming gender in IDA supported programs.

Relevance of the IDA Strategy:

4. **Congruence with Country Context and Country Program.** IDA’s strategy sought to address some of the key development challenges facing Ethiopia. Its program was closely aligned with the government’s two sequential five year plans covering 2005 to 2015. However, even when it became increasingly clear that the government’s plans and projections were overly optimistic, little adjustment was made to the CAS program, and lending increased when more resources became available after the IDA 15 replenishment. The Joint Staff Advisory Note of October 2011 was clear about the GTP’s shortcomings. These included an overly high projected growth rate, inappropriate monetary policy, weakened financial sector intermediation because of directed credit, a vulnerable external position due to credit restrictions on imports, and strain on debt sustainability caused by public sector financing needs. Nevertheless, the CAS, CASPR and CASCR attributed the shortfalls to exogenous shocks and did little to analyze the role of deficiencies in economic management. Consequently, although IDA’s strategy was consistent with the government’s objectives, the program did not adjust significantly in spite of clear signals of unmitigated macroeconomic and governance-related risks to Ethiopia’s long-term debt sustainability and development effectiveness.

5. **Relevance of Design.** There are varying degrees of relevance in the design of IDA assistance. In some areas, such as basic services and roads, the link between IDA interventions and CAS outcomes was strong; but in many other cases, such as macro-fiscal stability, the quality of public administration, and financial sector performance, IDA interventions did not suffice to bring about the desired outcomes to fulfill the objectives. The results framework presented the *intended* causal chain from IDA interventions to CAS outcomes, and to strategic objectives, with milestones and quantifiable indicators to measure progress. However, with four pillars (five after the CASPR), 22 outcomes, 39 indicators and 48 milestones, the results matrix is cumbersome. In addition, many outcome indicators were narrowly defined to reflect essentially the outputs of IDA projects (e.g. “increase in road density”, “60 hectares watershed rehabilitated”, and “participatory planning of basic services in *woredas* that receive Local Investment Grants”).

6. **Risk Identification and Mitigation.** The CAS and CASPR presented an incomplete risk analysis, and as a result, did not have a comprehensive approach to risk mitigation. Four main risks were identified: vulnerability to external shocks, governance-related risks, macroeconomic risks, and weak capacity. Vulnerability to drought and to regional conflict was considered the most serious risk, and the mitigation measures were found within the IDA program: lending that addressed vulnerability and those operations whose disbursement could be quickly accelerated. The IDA program was, in effect, self-insured against this risk. In the event, drought did materialize, and IDA lending was accelerated, but it offered little relief from the drought’s negative impact on other IDA operations (e.g. hydropower generation).

7. Governance-related risks, which IDA identified as possible disputes over local elections and on-going military action in a part of Ethiopia, were considered diminishing and stable; while macroeconomic risks were expected to be limited to food and oil price increases, rather than policy-related shortcomings. No specific measures were planned to mitigate these risks. Weak capacity was recognized as a real threat to IDA portfolio management. IDA- and other donor-supported procurement and public financial management reforms and capacity building programs were envisioned to help mitigate this risk. Against CAS/CASPR expectations, macroeconomic risks also materialized, and CAS results were affected as there was little in the way of mitigation measures on this aspect.

Overview of CAS Implementation:

Lending and Investments:

8. The CASPR envisioned lending (new credits) to amount to some \$635 million per year during FY08-11, depending on the IDA replenishment and allocation. Total actual lending reached \$2,903 million, including \$1,312.5 million in non-programmed projects, of which US\$785 million was approved in FY12 for two new projects plus additional financing for existing projects. The planned Private Sector Development Support project was dropped, and the much-anticipated PRSC did not materialize as the government and IDA did not reach agreement on the private sector development reform agenda. Adding to the IDA credits was \$1,421 million in IDA grants (mainly funding for the Protection of Basic Services (PBS) and Productive Safety Net Program (PSNP)). As a result, total IDA financial support to Ethiopia amounted to \$4,324.8 million, 3.6 percent of the cumulative GDP over FY08-11. Most of this financing was intended to support basic services, social safety nets, and infrastructure. Disbursements totaled \$3,532.6 million over FY08-12, and net transfers were only slightly lower because repayments were small (Ethiopia's debts were largely forgiven in 2004).

9. IDA's portfolio performance has followed a roller coaster course. The proportion of commitments at risk in total commitments went from 30 percent in FY08, down to 7.5 percent in FY09, up to 20.7 percent in FY10, then back to 7.4 percent in FY11, before landing at just 2.1 percent in FY12. Although these performances were strong compared to Africa Region and IDA averages, the fluctuations suggest that the situation could quickly change with adverse developments. The portfolio has doubled in value with fewer projects, and disbursement has been rapid because of the PBS and PSNP. The quality of IDA operations was mixed. IEG reviewed the ICRs of eight projects that were closed during the CAS period; of these, one was rated satisfactory on development outcome, four had moderately satisfactory outcomes, and three were rated moderately unsatisfactory. Half of the projects were also considered to carry significant or high risks to sustainable development outcomes.

Analytic and Advisory Activities (AAA) and Services

10. IDA delivered 28 pieces of AAA: 16 as planned, plus 12 that replaced nine studies which were either dropped or delayed. The issues they covered were relevant, and some of them (e.g. the 2011 Policy Note on Land Administration) provided constructive suggestions for improvement, although it is less clear if the government plans to undertake the necessary measures.

Partnerships and Development Partner Coordination

11. The US, Britain, Canada, Germany, and the Netherlands accounted for three-quarters of total bilateral aid disbursed, which was more than from all the multilateral institutions combined. Donor support has increasingly become programmatic (i.e. disbursed against spending for approved programs). The CASCR reports that 60 percent of donor support is through such programs.

Safeguards and Fiduciary Issues

12. There are no cases of safeguard violations in the Inspection Panel. In the period FY09-FY12, INT received several allegations of possible fraud and corruption, and investigated five cases, of which three were substantiated and one is currently under investigation.

Overview of Achievement by Objective:

Pillar I. Fostering economic growth

13. Under this pillar, the IDA program focused on supporting macro-fiscal stability, accelerating the level and productivity of investment in infrastructure in a sustainable manner, increasing productivity of agriculture; and strengthening supply responsiveness of industry and services sector.

14. **Support macro-fiscal stability.** As discussed in the Country Context and Risk Identification and Mitigation sections, Ethiopia faces considerable macroeconomic challenges despite an outward appearance of stability amid robust growth. Inflation fluctuated and surged to double digits during the CAS period as a result of loose monetary policies and unstable global commodity prices, pervasive price controls notwithstanding. Although budget execution has been prudent, a narrow tax base, off-budget spending, large financing needs for public investments and reliance on external borrowing to finance the budget deficit all contribute to making Ethiopia's fiscal position fragile. Externally, despite strong trade performance, partly reflecting the impact of credit restrictions on imports, Ethiopia's structural trade imbalance accentuates its vulnerability to terms of trade shocks.

15. The IMF played the leading role in supporting this objective. IDA contributed through two studies, the Public Finance Review Joint Budget and Aid Review (FY08) and a policy note on Macro-Fiscal Sustainability Issues (FY09).

16. **Accelerate the level and productivity of investment in infrastructure in a sustainable manner.** Infrastructure investment has risen, particularly in the road network. The CASCR reports an increase of road density by 25 percent in 2007-2011, and the Global Competitiveness Report's quality of roads score improved from 2.8 to 4.1 (out of 7) between 2008-09 and 2011-12. The score on the quality of overall infrastructure also improved, increasing from 2.6 to 3.6. Sustaining the government's ambitious infrastructure investment plan, however, faces challenges in mobilizing the necessary resources and inputs, for both new constructions and maintenance of the existing network. Ethiopia has invested heavily in the electricity sector, with the state-run provider pushing ahead with several major projects to increase generating capacity and transmission lines. The CASCR reports that the percentage of towns with access to electricity increased from 16 to 60 percent in 2004-2011. The reliance of the country on hydroelectric power (98 percent) continues to render it vulnerable to drought. Investment in the information and communication technology sector has reduced the cost of broadband and dial-up internet services by 33 and 98 percent, respectively.

17. IDA support was provided through several lending operations: the Roads Adaptable Program Loan APL 4 (FY09) and the Roads Sector Development Support Program II (FY10) aimed to strengthen and increase the road transport infrastructure and its reliability; while the Energy Access Project (FY03) and additional financing (FY10); the Accelerated Electricity Access (Rural) Expansion Project (FY06 and FY08); and the Ethiopia/Nile Basin Initiative Ethiopia-Sudan Interconnector Project (FY08) aimed to improve the access to and quality of electricity supply. In addition, IDA prepared the Eastern Nile Strategic Basin Assessment and Assistance Strategy (FY12).

18. **Increase productivity of agriculture.** Agriculture and agro-industry have benefited from large state investments in road, power and market networks, but production remains mainly at a smallholder level. More favorable weather and more land being brought into production have facilitated agricultural output growth. The CASCR reports that, according to official statistics, agricultural productivity of major crops increased on average by 14 percent between 2007/8 - 2010/11, but notes that the government data on yield increases are not corroborated by the Food and Agricultural Organization/World Food Programme missions. The government's emphasis on attracting large commercial investors in agriculture, which can carry attendant social and environmental risks, needs to be complemented by measures that encourage the upgrading of smallholder farming given the structure of the agriculture sector in Ethiopia. In 2009, the Ministry of Agriculture led a study on the bottlenecks in the agricultural

extension system with the objective of improving its effectiveness. The Agriculture Transformation Agency, newly established with donor support, can play a key role in this regard.

19. IDA supported agricultural productivity through Pastoral Community Development 2 (FY08), East Africa Agriculture Program (FY09), Irrigation and Drainage (FY11), Agricultural Growth Program (FY11) and the PSNP APL3 Additional Financing (FY12), as well as through the Rural Investment Climate Assessment (FY09).

20. **Strengthen supply responsiveness of industry and services sector.** During 2007/08-2010/11, the industry and services sectors expanded rapidly, while FDI increased from 0.4 to 1.1 percent of GDP. The space for unfettered private sector development, however, remains limited as the CASCR notes. Although privatization has slowly gained momentum, with seven new state-owned farms sold in early 2012 following the sale of three breweries in 2011, adding to a total of 115 privatized state-owned enterprises, the overall business environment remains difficult. Ethiopia ranked 111th (out of 183) in 2012 by the Ease of Doing Business indicator, down from the 103rd in 2010. Its regulatory regime regarding external trade (157th) and getting credit (150th) are particularly cumbersome. The more comprehensive Global Competitive Report shows some improvement, with the score increasing from 3.4 to 3.8 (out of 7) during 2008/09-2011/12. Nevertheless, many activities continue to be dominated by politically-connected businesses, while the bulk of private initiative is in the services (often informal) sector. The government has approached financial liberalization extremely cautiously. IDA work on improving the financial payments system and setting up a credit information center were not able to bring more credit to the private sector as credit in each bank remains under state control. Similarly, improving accounting and auditing in line with International Financial Reporting Standards does not address a binding constraint when there are few loans forthcoming.

21. IDA provided assistance through the Tourism Development Project (FY09), which aimed to increase the number of international tourist arrivals and jobs created in targeted destinations. Several AAAs were delivered, including Mining Sector Support and Extractive Industries Transparency Initiative (EITI) (FY08), Accounting & Auditing Report on the Observance of Standards and Codes (ROSC) (FY08), Investment Climate Assessment (FY08), Telecoms Reform Options (FY09), Public Finance Review – Water (FY09) and Tourism Sector Competitiveness Report (FY12).

22. IEG rates the outcomes of IDA support under Pillar 1 as *moderately unsatisfactory*. Given the perception of low macroeconomic policy-related risks, IDA support did little to address the macro-fiscal imbalances that accompanied the rapid growth in recent years. State-led infrastructure investments have helped improve the country's transport, power, and communication networks. Although agricultural output has increased, improvement in agricultural productivity has been limited due to un-tackled structural issues including insecure land tenure, opaque input and output markets, limited access to finance and restrictive trade regime. Similarly, IDA interventions in support of private sector development were scaled down and thus have not been able to contribute to measurable improvements in the business climate.

Pillar II: Improving access to and quality of basic service delivery

23. Objectives under this pillar included improving access to basic services, enhancing quality of basic services, and enhancing citizens' voice to improve quality of basic services.

24. **Improving access/coverage of basic services.** The CASCR reports an overall improvement in access and coverage of education, health, water, and sanitation services. In primary education, the net enrollment ratio remained relatively stable, declining slightly from 82 to 81 percent and the gender parity index increased from 0.93 to 0.94 over the period of 2008-2010 according to the UNESCO Institute for Statistics. In secondary education, gross enrollment rates rose from 33.3 to 35.7 percent and the gender parity index from 0.72 to 0.82 percent during the same period. Ethiopia made some progress in the health sector, although less than envisaged in the CAS. During the CAS period, the proportion of children vaccinated against DPT3 increased from 72.6 to 85 percent, exceeding CAS target of 83 percent; the

number of new malaria cases declined by 53,248 cases, against the CAS target of 100,000 cases; and the percentage of pregnant women receiving iron and folate supplementation rose from 10 to 17 percent, somewhat less than the CAS target of 23 percent. At the same time, the percentage of population with access to potable water in rural areas within 1.5 km increased from 46 to 85 percent (82 to 91 percent in urban areas) and proportion of rural/urban households using latrines reached 60 percent by the end of the period, from just 39 percent in 2007-08.

25. IDA supported the provision of basic services through the Water Supply and Sanitation Project Additional Financing (FY08), the Urban Local Government Development Project (FY08) and its Additional Financing (FY12), Protection of Basic Services 2 Project (FY09) and its Additional Financing (FY11), General Education Quality Improvement Project (FY09), and Urban Water Supply and Sanitation Project Additional Financing (FY12). IDA also provided assistance through Ethiopia Education and Nutrition Linkages (FY08) AAA.

26. **Enhancing quality of basic services.** There is some evidence that the quality of education and health services has improved. The World Economic Forum's index on the quality of overall education rose from 3.2 to 3.9 (out of 7) during 2008-2010/11, while that on primary education improved from 2.8 to 3.3 during the same period. The CASCR reports on grade 5 completion rates, which increased from 65 to 69 percent, although it fell short of the CAS target of 87 percent. In health, infant mortality per 1,000 live births declined substantially from 109.0 to 67.1 during 2005-2009, but the percentage of births attended by trained health personnel, which rose from 9 to 16.6 percent during 2007-2011, was below the target of 27 percent.

27. IDA's support to this objective included the General Education Quality Improvement Project (FY09) and the Protection of Basic Services 2 Project Additional Financing (FY11). In addition, IDA delivered a Health Financing Note in FY08.

28. **Enhancing citizens' voice to improve quality of basic services.** The causal link between citizens' voice and quality of basic services is complex, and the link between the outcome sought by the CAS (i.e. the use of community radios) and service quality improvement is tenuous. As noted by the CASCR, the choice of outcome indicator (i.e. the number of *woredas* with community radio stations) for measuring citizens' voice in service quality was not appropriate. Instead, an indication of stronger citizens' influence on the quality of basic services may be gleaned from the increase (from 52 to 58 percent) in the percentage of people reporting *woreda* officials having actively consulted citizens in their Kebele on the quality of basic services.

29. IDA supported this objective through the Protection of Basic Services 2 Project (FY09) and its Additional Financing (FY11), and the Public Sector Capacity Building Project (FY10).

30. IEG rates the outcomes of IDA support under Pillar 2 as *moderately satisfactory*. Access to basic services in education, health, water, and sanitation, has increased. To varying degrees, school enrollment, child vaccination, access to clean water and sanitation have all improved, although many of the improvements fell short of the CAS targets. There is less evidence on the improvement in the quality of basic services, although the advances in grade completion rate and maternal and child health achievements provide some indication of progress. Attribution of the progress to IDA support is, of course, more difficult. On the other hand, there is little to indicate enhanced citizens' voice in service quality improvement.

Pillar III: Reducing Vulnerability

31. Objectives under this pillar included reducing exposure to chronic food insecurity and shocks and addressing environmental degradation and population pressures.

32. **Reduce exposure to chronic food insecurity and shocks.** The CAS documents reflect a concern about individual vulnerability (i.e. individuals suffering food insecurity) more than aggregate vulnerability (i.e. food shortages). Government distribution of food to selected groups could remedy the

first, but the latter requires less volatile harvests. Food delivery programs have increased in scope and scale (reaching more than 7.5 million people now) and contributed to reducing the food gap (as measured by the number of months a household is unable to satisfy its food needs) from 3.6 to 2.3 months among all households, according to the Evaluation of Ethiopia's Food Security Program. In addition, the public works component helped rehabilitate 210,000 hectares and construct 318,212 hectares of watershed over 2008–2011. However, the CASCR reports that the number of food-poor people has risen between 2004/05 and 2010/11, and humanitarian assistance to the transient food-insecure and other beneficiaries reached a very high level of US\$807 million per year between 2008 and 2011. The Joint Staff Advisory Note on the GTP concluded that in the best case scenario, 80 percent of the current beneficiaries in cropping areas and none in pastoral areas would be ready to graduate from the PSNP by 2014/15. The CASCR also reports that the incidence of various shocks was as high as in previous years, and the proportion of households without access to input markets increased by 9 percent over 2008-2010.

33. IDA supported this objective with the PSNP series and additional financing (FY08, FY10 and FY12), and the Global Food Crisis Response (FY09). IDA's analytical work included the analysis related to PSNP, the Ethiopia Urban Poverty, and the policy notes on urban and rural safety net.

34. **Address environmental degradation and population pressures.** According to United Nations Environment Programme (UNEP), of all the environmental problems, Ethiopia's most critical concern is the management and utilization of its land resources, where intensive use of limited arable land has led to serious instances of land degradation. Water pollution as well as domestic and industrial wastes have resulted from the economic and social transformation of the country. Over 2005-2010, forest area declined from 13.0 to 12.3 percent of the land area, continuing the long-term trend of deforestation that reduced Ethiopia's forest area by 19 percent between 1990 and 2010. Sliding from 2.2 to 2.1 percent during 2008-2011, population growth is lower in Ethiopia than the Sub-Saharan African average (2.5 percent) and fertility rate is trending downward. The CASCR reports a doubling of contraceptive use (to 29 percent) as a measure of success in reducing population pressure.

35. IDA supported the environmental objectives through the PSNP 3 (FY10), the Sustainable Land Management project, the Tana and Beles Integrated Water Resources Development project (FY08), and AAA including a pilot study on economic modeling of adaptation to climate change (FY09) and Adaptation to Climate Variability and Change in Ethiopia (FY11).

36. IEG rates the outcomes under Pillar 3 as *moderately satisfactory*. IDA's funding and advice (and that of bilateral donors) have allowed the PBS and PSNP to attain their current size. However, while widespread famines have been avoided, farmers remain vulnerable. The absolute number of food-poor has increased and their reliance on food aid is as great as ever. Productive agriculture that is less vulnerable to drought has been constrained from developing by policy deficiencies. There is little evidence that environmental degradation has been seriously tackled although there have been some rehabilitation of watersheds through the PSNP. Population growth has slowed.

Pillar IV: Fostering improved governance

37. Under this pillar, IDA aimed to improve government effectiveness and quality of public administration and to enhance accountability and responsiveness of government.

38. **Improve government effectiveness and quality of public administration.** The government has been effective in mobilizing resources to improve basic service delivery and infrastructure network. This is reflected in the achievements discussed in Pillar 2 and the World Governance Indicators' (WGI) index on "government effectiveness" which improved from -0.41 to -0.35 (range from -2.5 to 2.5) over 2008-2010. Evidence of improved quality of public administration, however, is lacking. The WGI's index on "regulatory quality" worsened from -0.83 to -0.88 in 2008-2010; so did Global Competitiveness Report's indicator on "burden of government regulation" which deteriorated from 3.8 to 3.6 (out of 7) between 2008/09 - 2011/12, but that on "wastefulness of government spending" showed some improvement from 3.7 to 4.1. The CASCR reports similarly mixed results: while there was an overall

increase in the percentage of people satisfied with a range of basic services (though some did not meet CAS targets), the proportion of people who made an extra payment for a general service has increased.

39. **Enhance accountability and responsiveness of government.** During the CAS period, IDA focused on building local institutions to improve local governments' accountability and responsiveness. The CASCR reports an increased participation of citizens in local affairs and more disclosure of budget and spending information in project localities. At the aggregate level, these efforts have been accompanied by some improvements, as reflected for instance in the Global Competitiveness Report's (GCR) score on "public trust in the financial honesty of politicians", which rose from 2.7 to 3.3 (out of 7) between 2008/09 - 2010/11. The challenges, however, remain significant: the GCR score on "transparency of government policymaking" decreased from 3.8 to 3.6, while the World Governance Indicator's index on "voice and accountability" deteriorated from -1.20 to -1.31 (range of -2.5 to 2.5).

40. IDA supported these two interlinked objectives through the PBS 2 (FY09), the Public Sector Capacity Building Program (FY10), the Urban Local Government Development (FY08, FY12) and AAA that included the Investment Climate Assessment (FY08), the Public Finance Review – JBAR (FY08), the Procurement Reforms TA (FY11) and the Capacity Building TA (FY10).

41. IEG rates the outcomes of IDA support under Pillar 4 as *moderately unsatisfactory*. The IDA program has helped the government improve the delivery of basic services, reduce critical infrastructure bottlenecks, and increase citizen participation and budget transparency in project areas. However, the quality of public administration does not seem to have improved as bribery remains common in exchange for receiving general services. In the context of restrictive laws governing the media, civil society and political funding, any indications of greater accountability or responsiveness to citizens are at best mixed.

Other Outcomes:

42. The fifth pillar added in the CASPR had two objectives – increasing donor partnership through IDA-supported multi-donor programs and mainstreaming gender in IDA supported programs. The first has been achieved as measured by the percentage of donor support provided through program-based approach; the second has not, as only two-thirds (versus a target of 100 percent) of new IDA lending included gender considerations in project design. These achievements are considered in assessing IDA performance.

| Objectives | IEG Rating |
|---|---------------------------|
| Pillar I: Fostering Economic Growth | Moderately Unsatisfactory |
| Pillar II: Improving access to and quality of basic service delivery | Moderately Satisfactory |
| Pillar III: Reducing vulnerability | Moderately Satisfactory |
| Pillar IV: Fostering improved governance | Moderately Unsatisfactory |

4. Overall IEG Assessment

| | CASCR Rating | IEG Rating |
|-------------------------|--------------------------------|--------------------------------|
| Overall Outcome: | <i>Moderately Satisfactory</i> | <i>Moderately Satisfactory</i> |
| IDA Performance: | <i>Moderately Satisfactory</i> | <i>Moderately Satisfactory</i> |

Overall outcome:

43. The CASCR rates the overall outcome of IDA strategy for Ethiopia as *moderately satisfactory*. IEG is able to concur with the CASCR rating, although in its view the rating is very borderline. The CASCR rates IDA achievement against a narrowly defined set of outcome indicators, and IEG's

recognition of this provides the basis for its concurrence with the CASCR's overall outcome rating. Nevertheless, in IEG's judgment, several unaddressed policy imbalances and structural constraints pose significant risks for the results of the IDA program and their sustainability.

44. Under Pillar 1, IDA support did not contribute appreciably to addressing the macro-fiscal imbalances that have accompanied the rapid growth and overheating of the economy in recent years. Public infrastructure investments have helped to improve the country's transport, power and communication networks. Agricultural production has increased, but productivity has not improved owing to unresolved structural issues including insecurity in land tenure, opacity in input and output markets, limited access to finance, and a restrictive trade regime. IDA interventions in support of private sector development have been scaled down and thus have not been able to contribute to measurable improvements in the climate for private business. Under Pillar 2, access to basic services in education, health, and water and sanitation have improved in varying degrees, even though many of the improvements fell short of the CAS targets. Improvement in the quality of basic services is somewhat less evident, although the advances in grade completion rates and maternal and child health achievements do provide some indications of progress. There is however less evidence of enhanced citizens' voice in service quality improvement. Under Pillar 3, IDA support, both financial and advisory, together with that of bilateral donors, has allowed the extensive food aid programs to expand to their current size. Although widespread famines have been avoided, farmers remain vulnerable. The number of food-poor has increased and their reliance on food aid is as great as ever. Productive agriculture that is less vulnerable to drought has been constrained from developing by policy-related shortcomings. There is also little evidence that environmental degradation has been seriously tackled, although there has been some rehabilitation of watersheds. Under Pillar 4, the IDA program has helped improve the effectiveness of the government in delivering basic services and increasing infrastructure density, but results in improving governance, accountability and government responsiveness have been limited. Some of the citizen participation and budget transparency indicators have improved in project areas, but in the context of restrictive laws governing the media and civil society, there is little evidence that broader accountability or responsiveness to citizens has improved.

IDA Performance:

45. As with the overall outcome rating, IEG can concur with the CASCR's rating of IDA performance as *moderately satisfactory*. Once again, however, in IEG's view the rating is borderline. IEG's concerns relate mainly to incompleteness of the risk assessment and mitigation measures in the strategy documents and the CASCR. While the IDA strategy and program was closely aligned with the government's development plans, it could have done significantly more to flag and analyze the contribution of deficiencies in economic management and governance to adverse developments, including social tensions. This is particularly important in light of IDA's leadership role among the development community in the country, and the weight that its judgment carries within that community. The CAS results framework presented the causal chain from IDA interventions to CAS outcomes and to strategic objectives, with milestones and indicators to measure progress. Nevertheless, many outcome indicators were de facto output indicators that were too narrowly defined to be truly useful in measuring attainment of CAS objectives. On balance, the lending portfolio had good, albeit volatile, ratings, better than the portfolio for AFR and for IDA, although three out of the eight projects that IEG reviewed were rated moderately unsatisfactory in development outcome, and four of the eight faced significant or high risks to sustainable development outcome. Finally, it is clear that greater efforts are needed to mainstream gender considerations across the IDA program.

5. Assessment of CAS Completion Report

46. The CASCR is clearly drafted and adheres closely to the results framework, although it could have considered the indicators and milestones less mechanistically and questioned their broader relevance for attaining the objectives. To its credit, it does take on board inconvenient facts: for instance, that the absolute number of food-insecure people had increased (paragraph. 59), and that government data on crop yields were contradicted by FAO/WFP mission (footnote11). Like the CAS and CASPR, however, it allocates too little attention to policy shortcomings and the associated risks.

6. Findings and Lessons

47. One major lesson from the CAS/CASPR/CASCR is that, going forward, it is important for IDA to take a broader view of sustainability and to adopt a long-term vision in its risk analysis. The very substantial scope and scale of IDA's program make it especially important that sustainability and risk considerations are not clouded by the country's apparent political and socioeconomic stability, and that IDA is able to factor in underlying imbalances, policy shortcomings, and tensions as integrally as possible, putting in place a comprehensive risk mitigation and management approach. Another lesson is that the results framework needs to be simpler, with outcome indicators that are more closely matched with the underlying strategic objectives.

| | |
|------------------------|--|
| Annex Table 1: | Summary Achievements of CAS Objectives |
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Annex Table 1: Summary of Achievements of the CAS Objectives

| | CAS 08-12: Pillar 1 Fostering economic growth | Actual Results (as of current month year) | Comments |
|-------------------------------|--|---|--|
| Objectives | 1. Sustain macroeconomic stability and economic growth support macro-fiscal stability | | |
| | 2. Accelerate the level and productivity of investment in infrastructure in a sustainable manner | | |
| | 3. Increase productivity of agriculture | | |
| | 4. Strengthen supply responsiveness of industry and services sector | | |
| Major Outcome Measures | 1. Sustain macroeconomic stability and economic growth support macro-fiscal stability | | |
| | Decrease in the inflation rate from 34% in 2007/08 to single digits by 2011/12. | 33% in 2011. Inflation in January 2012 is 32%. | Source: WDI and CASCR. |
| | Increase the revenue/GDP ratio from 12.1% in 2007/08 to 14.3% in 2011/12. | Revenue to GDP ratio was 13.5% in 2010/11 and estimated to marginally improve to 13.6% in 2011/12 (IMF estimates). | Source: IMF Article IV and CASCR. |
| | 2. Accelerate the level and productivity of investment in infrastructure in a sustainable manner | | |
| | Increase the volume of civil works contracts disbursed by Domestic Contractors from 35% of total in 2007/08 to 54% by 2011/12. | The share of domestic contractors (volume of works done) increased to 77% in 2010/2011. | Source: CASCR. |
| | Increase the road density per 1000 sq.km from 38.6 km in 2007 to 45.7 km in 2011/12. | Road density per 1000 sq.km is 48.1 km in 2011. | Source: CASCR. |
| | Power trade between Ethiopia, Sudan, and/or Djibouti. | Power trade between Ethiopia and Sudan has been delayed but PPA with Djibouti signed and trade started in 2011. | Source: CASCR. |
| | Establish an East Africa Power Pool under the NBI framework by end-2011/12. | Board approval date for East Africa Power Pool project set for May 2012. | Source: CASCR. |
| | Raise the percentage of towns with access through at least one connection to electricity from 16% in 2004/05 to 50% in 2010/11. | Over 40% of towns and villages have access to electricity in 2011. | Source: CASCR. |
| | 3. Increase productivity of agriculture | | |
| | Increase in the average agriculture value added by 5% per annum. | | Source: CASCR. Agricultural productivity of major crops increased by average of 14.0 % between 2007/8 - 2010/11. Teff increased from 11.7% to 12.6%, wheat increased from 16.2% to 18.4% and sorghum increased from 17.3% to 20.9%. |
| | 4. Strengthen supply responsiveness of industry and services sector | | |
| | Increase credit to the private sector as a ratio to GDP from 12% in 2005/06 to 16% in 2011. | Private Sector credit to GDP ratio is reported as 14% in 2011 | Source: CASCR. |
| | Decrease the cost of broadband and dial-up Internet services by 40% and 20%, respectively, between 2008 and 2011. | Cost of broadband and dial-up Internet services declined by 33% and 98%, respectively, between 2008 and 2011. | Source: CASCR. |
| | A cumulative increase in FDI of at least 40% by the end of the CAS period. | FDI increased from \$894 million in 2008/09 to \$1033 million in 2010/11 and estimated to reach at \$1170 million in 2011/12. Cumulative increase in FDI approximately 30% in 2011. | Source: CASCR. |
| | Make the Ethiopia's corporate sector follow accounting and auditing standards that are in line with International Financial Reporting Standards (IFRS) and International Standards of Auditing (ISA) as assessed by the 2012 ROSC. | All commercial Banks are required to follow IFRS. It is not mandatory to apply IFRS in the corporate sector, draft law is in place to be discussed at Council of Ministers in January 2012. Similarly, the same law requires all audit firms to apply ISAs when conducting the audit of corporate institutions- expected June 2012. | Source: CASCR. |

| | CAS 08-12: Pillar 1 Fostering economic growth | Actual Results (as of current month year) | Comments |
|--|---|--|---|
| Ongoing pre CAS 08-12 Support | P049395 Energy Access Project | Approved FY03. Active | Latest internal rating: Moderately Satisfactory |
| | P097271 Accelerated Electricity Access (Rural) Expansion | Approved FY06. Active | Latest internal rating: Moderately Satisfactory |
| New Lending Support | P107217 Public Sector Capacity Building Program | Approved FY10. Active | Latest internal rating: Satisfactory |
| | P117644 Roads Sector Dev. Support Program II | Approved FY10. Active | IEG outcome rating: Moderately Satisfactory |
| | P106872 Roads Adaptable Program Loan APL 4 | Approved FY09. Active | Latest internal rating: Satisfactory |
| | P074011 Ethiopia/Nile Basin Initiative: Ethiopia-Sudan Interconnector | Approved FY08. Active | Latest internal rating: Moderately Satisfactory |
| | P101556 Rural Electricity Access Expansion 2 | Approved FY08. Active | Latest internal rating: Moderately Satisfactory |
| | P108932 Pastoral Community Development 2 | Approved FY08. Active | Latest internal rating: Satisfactory |
| | P125307 Irrigation and Drainage | Approved FY11. Active | Latest internal rating: Moderately Satisfactory |
| | P112688 East Africa Agriculture Program | Approved FY09. Active | Latest internal rating: Moderately Satisfactory |
| | P113032 Agricultural Growth Program | Approved FY11. Active | Latest internal rating: Satisfactory |
| | P120172 Additional Financing for Energy Access Project | Approved FY03. Active | Latest internal rating: Moderately Satisfactory |
| | P119893 Electricity Network Reinforcement and Expansion Project (ENREP) | Approved FY12. Active | NA |
| | P126430 PSNP APL3 Add. Financing | Approved FY12. Active | NA |
| | P098132 Tourism Development | Approved FY09. Active | Latest internal rating: Moderately Unsatisfactory |
| | P122764 Women Entrepreneurship Development | Approved FY12. Active | NA |
| Non-Lending Support (Grants and Special Financing Projects) | P117644 Roads Sector Dev. Support Program II | | |
| | P119893 Electricity Network Reinforcement and Expansion Project (ENREP) | | |
| | P112688 East Africa Agriculture Program | | |
| | P122764 Women Entrepreneurship Development | | |
| Planned AAA | P101236 ET-Public Finance Review JBAR (FY08) (ESW) | Delivered to Client FY08 | |
| | P092926 Ethiopia Investment Climate Assessment using panel data (ESW) | Delivered to Client FY08 | |
| | P100467 Ethiopia Rural Investment Climate Assessment (ESW) | Delivered to Client FY09 | |
| | P108425 Ethiopia: Accounting & Auditing ROSC (FY08) (ESW) | Delivered to Client FY08 | |
| | P119840 Ethiopia Tourism Sector Competitiveness Report (ESW) | Delivered to Client FY12 | |
| | P118721 Policy Note on Land Administration (ESW) | Delivered to Client FY11 | |
| | P108859 Eastern Nile Strategic Basin Assessment and Assistance Strategy (ESW) | Delivered to Client FY12 | |
| Additional AAA | P109708 Ethiopia Policy Notes Macro-Fiscal Sustainability Issues-Growth (ESW) | Delivered to Client FY09 | |
| | P101237 ET-Public Finance Review -Water (FY09) (ESW) | Delivered to Client FY09 | |
| | P129511 Ethiopia Country Portfolio Performance Review (CPPR) (ESW) | Delivered to Client FY12 | |
| | P114554 Ethiopia Financial Sector Review (TA) | Delivered to Client FY10 | |
| | P114305 Ethiopia Public Private Forum (TA) | Delivered to Client FY09 | |
| | P114002 Ethiopia Telecoms Reform Options (TA) | Delivered to Client FY09 | |
| | P119180 Ethiopia A&A ROSC follow up (TA) | Delivered to Client FY12 | |
| | P097323 ET Economic Growth (TA) | Delivered to Client FY08 | |
| | P096955 ET Professional Services (TA) | Delivered to Client FY12 | |
| | P079325 ET Policy Notes (ESW) | Delivered to Client FY12 | |
| | P117750 Ethiopia: Mining Sector Support and EITI (TA) | Delivered to Client FY11 | |
| | P107749 Ethiopia - Results Monitoring (TA) | Delivered to Client FY08 | |

| CAS 08-12: Pillar 2 | | Actual Results | Comments |
|---|---|--|--|
| Improving Access to and Quality of Basic Service | | (as of current month year) | |
| Objectives | 1. Improve access/coverage of basic services | | |
| | 2. Enhance quality of basic services | | |
| | 3. Enhance citizens' voice to improve quality of basic services. | | |
| Major Outcome Measures | 1. Improve access/coverage of basic services | | |
| | Decrease the ratio of girls to boys in primary school from 89% in 2006/07 to 93% in 2011/12 in grades 1-4 (1st cycle of primary), 76% to 93% in grades 5-8 (2nd cycle of primary), from 63% to 75% in grades 9-10 (1st cycle of secondary) from 50% to 50% in grades 11-12 (2nd cycle of secondary) (the 2011/12 target for grades 11-12 is the same as the 2006/07 baseline due to decline in percentage in 2008/09) | Gender Parity Index for primary school grade 1-4 was 90%, in grade 5-8: 96%, in grade 9-10: 83% and in grade 11-12: 71% in 2011. | Source: Education Statistics Annual Abstract 2010/2011. |
| | Increase total population with access to safe drinking water (rural and urban) from 52% in 2007/08 to 74.5% in 2011/12. | No data available. | Source: WDI. The proportion of people with improved water increased from 41% (2007) to 44% (2010) The proportion of people with improved water in rural areas increased from 30% (2007) to 34% (2010) The proportion of people with improved water in urban areas increased from 95% (2007) to 97% (2010) |
| | Raise the percentage of rural/urban households using latrines from 39% 2007/08 to 60% 2011/12. | 60% of rural/urban households using latrines in 2011/12. | Source: CASCR. |
| | Reduce the proportion of malfunctioning rural water facilities from 25% in 2007/08 to 16% in 2011/12. | Proportion of malfunctioning water facilities is 20% in 2010. 7168 Improved community water points constructed or rehabilitated under the project in 2011. | Source: CASCR. |
| | Increase the proportion of children vaccinated against DPT3 from 72.6% in 2006/07 to 83% by 2009/10. | Proportion of children vaccinated against DPT3 is 85% in December 2010. | Source: P103022 Protection of Basic Services 2 and WHO. Proportion of 1-year-olds vaccinated against DPT3 increased from 73% in 2007 to 86% in 2010 (WHO). |
| | Decrease the number of new malaria cases from 370,000 in 2006/07 to 100,000 by 2011/12. | WHO reports around 122,000 new cases in 2010 compared to 2009. | Source: WHO and CASCR. According to the Ethiopia MDGs 2010 Report, morbidity due to malaria declined by 48%, hospital admissions by 54% and mortality by 55% in 2009/10. |
| | Increase the percentage of young people (age 15-24) with understanding of how to prevent HIV/AIDS transmission from 67% of women and 54% of men in 2004/05 to 75% overall by 2011/12. | No data available. | Source: 2005 and 2011 Demographic and Health Surveys. Percentage of women and men age 15-49 who, in response to a prompted question, say that people can reduce the risk of getting the AIDS virus by using condoms every time they have sexual intercourse: 47.4% in 2005 to 61.6% in 2011 for women and 65.7% in 2005 to 80.7% in 2011 for men. |
| | Raise the percentage of pregnant women receiving iron and folate supplementation from 10% in 2004/05 to 23% in 2011/12. | Percentage of pregnant women receiving iron and folate supplementation was 17% in 2011 (DHS 2011). | Source: CASCR. |

| CAS 08-12: Pillar 2 Improving Access to and Quality of Basic Service | | Actual Results (as of current month year) | Comments |
|---|---|--|--------------------------------------|
| 2. Enhance quality of basic services | | | |
| | Increase the grade 5 completion rate from 65% in 2006/07 to above 87% in 2011/12. | Completion rate grade 5 is 69.1% in 2011. (Completion rates in 2009 and 2010 were 79% and 76% respectively.) | Source: CASCR. |
| | Raise the percentage of births attended by trained health personnel from 9% in 2004/05 to 27% in 2011/12. | Percentage of births attended by trained health personnel is 16.6 in November 2011. | Source: CASCR. |
| 3. Enhance citizens' voice to improve quality of basic services. | | | |
| | At least 10 woredas with community radio station in operation. | 8 woredas with community radio station in operation. | Source: CASCR. |
| Ongoing pre CAS 08-12 Support | NA | | |
| New Lending Support | P103022 Protection of Basic Services 2 | Approved FY09. Active | Latest internal rating: Satisfactory |
| | P121727 Protection of Basic Services 2 Add. Financing | Approved FY11. Active | Latest internal rating: Satisfactory |
| | P101474 Urban Local Govt Development Project | Approved FY08. Active | Latest internal rating: Satisfactory |
| | P125316 Urban Local Govt Development Project-Additional financing | Approved FY12. Active | Latest internal rating: Satisfactory |
| | P118533 Water Supply and Sanitation Project-Additional Financing | Approved FY10. Active | Latest internal rating: Satisfactory |
| | P129174 Urban Water Supply and Sanitation Project Additional Financing | Approved FY12. Active | Latest internal rating: Satisfactory |
| | P106855 General Education Quality Improvement | Approved FY09. Active | Latest internal rating: Satisfactory |
| Non-Lending Support (Grants and Special Financing Projects) | P118533 Water Supply and Sanitation Project-Additional Financing | | |
| | P125307 Irrigation and Drainage | | |
| | P129174 Urban Water Supply and Sanitation Project Additional Financing | | |
| | P125316 Urban Local Govt Development Project-Additional financing | | |
| Planned AAA | P096521 Health Financing Note Ethiopia (ESW) | Delivered to Client FY08 | |
| | P104836 Ethiopia Education and Nutrition Linkages (ESW) | Delivered to Client FY08 | |
| | P097324 ET-Gender (FY08) (ESW) | Delivered to Client FY08 | |
| Additional AAA | P113410 Ethiopia - Secondary Education Policy Note (ESW) | Delivered to Client FY10 | |
| | P123130 Ethiopia Post-Basic Education (ESW) | Delivered to Client FY12 | |
| | P117080 Health Systems for Outcomes – Ethiopia (TA) | Delivered to Client FY11 | |
| | P116038 ET-Health Syst. Strength. & Dial. (FY12) | Delivered to Client FY12 | |

| CAS 08-12: Pillar 3 Reducing Vulnerability | | Actual Results (as of current month year) | Comments |
|--|---|--|--|
| Objectives | 1. Reduce exposure to chronic food insecurity and shocks | | |
| | 2. Address environmental degradation and population pressures | | |
| | 3. Support greater economic engagement of women and youth | | |
| Major Outcome Measures | 1. Reduce exposure to chronic food insecurity and shocks | | |
| | Reduce the average number of days chronically food insecure households participating in PSNP public works activities (comprising 5.8 m people) report being food insecure from 110.6 days in 2006 to 98.5 days by end-2010. | No data available. | Source: CASCR. PSNP has improved food security by 1.1 months for households participating in public works activities between 2006 and 2010. (Impact assessment 2010). |
| | Develop a food security program and disaster risk management strategy that is coherent and consistent with macro outlook. | Food security program and disaster risk management strategy has been developed and expected to be approved by third quarter of FY12. | Source: CASCR. |
| | Rehabilitate 60,000 hectares watershed in 2007/08 and in 2011/12. | 528, 212 hectares watershed rehabilitated in 2007/08 and 2011/12 (210,000 ha through SLM and 318,212 ha through PSNP public works) | Source: CASCR. |
| | Raise investment in community based flood management from US\$0m in 2007/08 to US\$5m end 2011/12. | Investment in community based flood management is US\$ 1.4m at end of 2011/12. An additional US \$4.4 has been committed to ongoing construction of emergency shelters and procurement of heavy duty equipment to support dredging and embankment construction activities. | Source: CASCR. |
| | 2. Address environmental degradation and population pressures | | |
| | Federal and Regional SLM Platforms hold regular meetings to provide policy and technical guidance in the implementation of SLMP activities, including annual planning sessions to develop collaboratively annual work programs. | Platform meetings are continuing and guidance and directives are being provided by the SLM steering committees established by the TerrAfrica Initiative. | Source: CASCR. |
| | Increase the contraceptive prevalence rate as measured by Demographic Health Survey (DHS) from 15% in 2004/05 to 25% in 2011/12. | Contraceptive prevalence rate doubled to 29%. | Source: DHS 2011 and CASCR. |
| | Increase the participation of women in community meetings (social accountability interface meetings) related to PBS 2 by 30% between December 2010 and June 2012. | No data available until July 2012 when implementation of sub-projects begins. | Source: CASCR. |
| | Ongoing pre CAS 08-12 Support | N/A | |
| New Lending Support | P113220 Productive Safety Net Program APL 3 | Approved FY10. Active | Latest internal rating: Satisfactory |
| | P126430 PSNP APL3 Add. Financing | Approved FY12. Active | Latest internal rating: Satisfactory |
| | P096323 Tana Beles Integrated Water Resources | Approved FY08. Active | Latest internal rating: Moderately Unsatisfactory |
| | P113156 Global Food Crisis Response | Approved FY09. Active | Latest internal rating: Satisfactory |
| Non-Lending Support (Grants and Special Financing Projects) | P113156 Global Food Crisis Response | | |
| | P126430 PSNP APL3 Add. Financing | | |
| Planned AAA | P113142 Adaptation to Climate Variability and Change in Ethiopia (ESW) | Delivery to Client FY11 | |

| CAS 08-12: Pillar 3 Reducing Vulnerability | | Actual Results (as of current month year) | Comments |
|---|--|--|-----------------|
| Additional AAA | P110947 Economic modeling of adaptation to climate change - Ethiopia pilot study (ESW) | Delivery to Client FY09 | |
| | P098403 Ethiopia Urban Poverty (ESW) | Delivery to Client FY10 | |
| | P106704 PRTSR-Ethiopia-Review of Poverty Reduction and Transport Strategies (TA) | Delivery to Client FY08 | |
| | P118107 Urban safety net-Ethiopia (TA) | Delivery to Client FY10 | |
| | P099439 ET-Poverty and Migration (TA) | Delivery to Client FY12 | |
| | P121375 Designing and Implementing a Rural Safety Net in a Low Income Setting: Lessons Learned from ET's Productive Safety Net Program 05-09 (ESW) | Delivery to Client FY10 | |

| CAS 08-12: Pillar 4 | | Actual Results | Comments |
|---|---|---|-----------------|
| Fostering Improved Governance | | (as of current month year) | |
| Objectives | 1. Improve government effectiveness and quality of public administration | | |
| | 2. Enhance the accountability and responsiveness of government | | |
| Major Outcome Measures | 1. Improve government effectiveness and quality of public administration | | |
| | Improve perception of integrity and performance of public service: performance measured by percentages of people satisfied with Agriculture Extension Service, Solid-waste service, Water supply service and Health service, increasing from 82%, 70%, 60% and 34% in 2008 to 85%, 75%, 62% and 60% in 2012 respectively, and integrity measured by percentage of people who made extra payments for general service, decreasing from 4.3% in 2008 to 4.0% in 2012. | Percentages of people satisfied with Agriculture Extension Service, Solid-waste service, Water supply service and Health service was 94%, 74%, 58% and 70% respectively in 2011. The percentage of people who made extra payments for general service was 6.5% in 2011. | Source: CASCR. |
| | Improve the public financial management performance evidenced by at least 25% of the Public Expenditure and Financial Accountability indicators showing improvement over corresponding 2007 scores. | 14 Public Expenditure and Financial Accountability indicators improved out of a total of 28 from 2007 (50% improvement). | Source: CASCR. |
| | 2. Enhance the accountability and responsiveness of government | | |
| | Participatory planning of basic services adopted by 2011/12 in 30% of woredas that receive Local Investment Grants (from 0% in 2008/09). | Participatory planning of basic services adopted by 2011/12 in 80% of woredas that receive Local Investment Grants (from 0% in 2008/09). | Source: CASCR. |
| | Make that 12 out of 19 selected cities report a 75% increase (from the 2008 baselines reported by each city) in the number of citizen groups participating in the planning process for Capital Investment Plans by the end of 2011/12. | 17 cities out of 19 achieved 75% increase in 2010/11. | Source: CASCR. |
| | Implement targeted anti-corruption strategies to reduce corruption in key hotspots, as assessed at the end of FY2011/12. | A corruption study is being published in the next few weeks, after which a strategy for procurement in infrastructural development will be developed with the FEACC. | Source: CASCR. |
| | Layperson's Budget and Service Facility Templates posted in more than 50% of woredas by the end of 2011/12. | Layperson's Budget and Service Facility Templates posted in 83% of woredas by the end of 2011/12. | Source: CASCR. |
| 19 selected cities disclose budget and expenditure information by the end of 2011/12 from 0 in 2007/08. | All 19 cities have disseminated key information to the public on budgets and expenditures for 2008/09, 2009/10 and 2010/11 | Source: CASCR. | |
| Planned AAA | P101588 ET PER 2010 (ESW) | Delivered to Client FY11 | |
| | P076117 Public Expenditure Notes 2012 (ESW) | Delivered to Client FY12 | |
| | P115042 ET: Country Fiduciary Assessment (ESW) | Delivered to Client FY12 | |
| | P090210 Review of Expend. in Rural Dev (ESW) | Delivered to Client FY08 | |
| Additional AAA | P126027 Ethiopia Follow Up of Procurement Reforms (TA) | Delivered to Client FY11 | |
| | P118493 Ethiopia - Follow up on Procurement Reforms (TA) | Delivered to Client FY11 | |
| | P118446 ET Follow up on Procurement Reforms (TA) | Delivered to Client FY11 | |
| | P126028 ET Procurement Reforms Follow Up | Delivered to Client FY11 | |
| | P129511 Ethiopia Country Portfolio Performance Review (CPR) (ESW) | Delivered to Client FY12 | |
| | P119179 ET-Capacity Building Technical Assistance (TA) | Delivered to Client FY10 | |
| | P119229 ET-Portfolio FM arrangement Study | Delivered to Client FY10 | |

| CAS 08-12: Pillar 5 Other Outcomes | | Actual Results (as of current month year) | Comments |
|---|--|---|-----------------|
| Objectives | 1. Increase donor partnership through IDA-supported multi-donor programs | | |
| | 2. Mainstream gender consideration in the project development objective of all lending | | |
| Major Outcome Measures | 1. Increase donor partnership through IDA-supported multi-donor programs | | |
| | Paris Declaration target for 66% of donor support to be provided through program-based approaches is met by 2010, as measured by OECD (Baseline: 53% in 2005). | According to 2011 survey on monitoring the Paris Declaration coordinated by OECD-DAC, 61% of donor support was provided through program-based approaches in 2010. | Source: CASCR. |
| | 2. Mainstream gender consideration in the project development objective of all lending | | |
| | All new lending in FY11-12 should include gender considerations in the Project Development Objective (baseline is 0 and target is 100%). | 4 out of 6 new lending in FY11-12 includes gender considerations in the project design and results framework as per GAP criteria. | Source: CASCR. |

Annex Table 2: Actual and Planned Lending, FY08-12

| Project ID | Project | Proposed FY | Approval FY | Proposed Amount | Approved Amount |
|---|---|-------------|-------------|-----------------|-----------------|
| | Programmed projects | | | | |
| P101556 | Rural Electricity Access Expansion 2 | 2008 | 2008 | 133.5 | 130 |
| P074011 | Ethiopia/Nile Basin Initiative: Ethiopia-Sudan Interconnector | 2008 | 2008 | 41 | 41 |
| P096323 | Tana Beles Integrated Water Resources | 2008 | 2008 | 45 | 45 |
| P101474 | Urban Local Govt Development Project | 2008 | 2008 | 100 | 150 |
| P108932 | Pastoral Community Development 2 | 2008 | 2008 | 50 | 23.4 |
| P103022 | Protection of Basic Services 2 | 2009 | 2009 | 635 | 230 |
| P106855 | General Education Quality Improvement | 2009 | 2009 | | 50 |
| P098132 | Tourism Development | 2009 | 2009 | | 35 |
| P106872 | Roads Adaptable Program Loan APL 4 | 2009 | 2009 | | 245 |
| P113220 | Productive Safety Net Program APL 3 | 2010 | 2010 | 635 | 130 |
| P120172 | Additional Financing for Energy Access Project | 2010 | 2010 | | 180 |
| | Rural Development | 2010 | Dropped | | |
| | PSD Support | 2010 | Dropped | | |
| P107217 | Public Sector Capacity Building Program | 2010 | 2010 | | 50 |
| P113032 | Agricultural Growth Program | 2011 | 2011 | 150 | 108.4 |
| P121727 | Protection of Basic Services 2 Add. Financing | 2011 | 2011 | 340 | 173 |
| Total Programmed projects CAS FY08-11 | | | | 2,129.5 | 1,590.8 |
| | Non-programmed projects | | | | |
| P113156 | Global Food Crisis Response | | 2009 | | 122.5 |
| P112688 | East Africa Agriculture Program | | 2009 | | 30 |
| P118533 | Water Supply and Sanitation Project-Additional Financing | | 2010 | | 80 |
| P117644 | Roads Sector Dev. Support Program II | | 2010 | | 100 |
| P125307 | Irrigation and Drainage | | 2011 | | 60 |
| P125316 | Urban Local Govt Development Project-Additional financing | | 2012 | | 150 |
| P126430 | PSNP APL3 Add. Financing | | 2012 | | 370 |
| P119893 | Electricity Network Reinforcement and Expansion Project (ENREP) | | 2012 | | 200 |
| P122764 | Women Entrepreneurship Development | | 2012 | | 50 |
| P129174 | Urban Water Supply and Sanitation Project Additional Financing | | 2012 | | 150 |
| Total Non-Programmed projects CAS FY08-11 | | | | | 1,312.5 |
| Total projects CAS FY08-12 excluding Grants and Special Financing Projects | | | | 2,129.5 | 2,903.3 |

Annex Table 3: Grants and Trust Funds Active in FY08-12 (in US\$ million)

| Project ID | Project Name | TF ID | Approval FY | Closing FY | Approved Amount |
|------------|--|----------|-------------|------------|-----------------|
| P050383 | Food Security Project | TF 51169 | 2003 | 2010 | 5.15 |
| | | TF 52696 | 2005 | 2010 | 15.00 |
| P091084 | Grant for Strengthening Monitoring and Evaluation Capacity | TF 53920 | 2005 | 2008 | 0.48 |
| P091099 | ENSAP: Water Shed Project | TF 53020 | 2005 | 2008 | 2.50 |
| P075915 | Pastoral Community Development Project | TF 52888 | 2005 | 2009 | 1.88 |
| P049395 | Energy Access Project | TF 54213 | 2006 | 2012 | 1.86 |
| P098428 | Humbo and Soddoo Community-Based Natural Regeneration Project | TF 56939 | 2007 | 2010 | 0.19 |
| P079275 | Rural Capacity Building Project | TF 90084 | 2007 | 2012 | 18.74 |
| P102724 | National Strategy for the Development of Statistics | TF 57190 | 2007 | 2009 | 0.15 |
| P101929 | Managing and Enforcing Intellectual Property Rights: Creating a Driver of Growth | TF 57338 | 2007 | 2011 | 0.50 |
| P074015 | Protection of Basic Services | TF 90445 | 2007 | 2009 | 390.31 |
| | | TF 57683 | 2007 | 2009 | 8.03 |
| | | TF 56942 | 2007 | 2011 | 92.61 |
| | | TF 56885 | 2006 | 2009 | 177.45 |
| P077380 | Energy Project | TF 56092 | 2006 | 2012 | 4.93 |
| P090789 | ET-Sustainable Land Management Program (FY08) | TF 56287 | 2006 | 2009 | 0.35 |
| | | TF 90433 | 2007 | 2009 | 63.86 |
| P087707 | Productive Safety Nets Project (APL 1) | TF 58300 | 2007 | 2010 | 17.17 |
| | | TF 56013 | 2006 | 2008 | 67.77 |
| | | TF 56516 | 2008 | 2012 | 1.54 |
| P091077 | ET-Road Sector Dev. Stage III Proj. (APL3) in support of Govt's RSDP | TF 56516 | 2008 | 2012 | 1.54 |
| P076735 | Ethiopia Water Supply and Sanitation Project | TF 91704 | 2008 | Active | 111.68 |
| P098428 | Humbo and Soddoo Community-Based Natural Regeneration Project | TF 90962 | 2008 | Active | 0.73 |
| P121010 | Innovative Pilot Scheme Would Match Seeds to the Needs of Women Farmers | TF 96713 | 2010 | Active | 0.20 |
| P125475 | LSMS-ISA Ethiopia Rural Socioeconomic Survey | TF 98979 | 2011 | Active | 1.83 |
| P119064 | Ethiopian Diaspora Health and Education Professionals Mobilization Project | TF 99283 | 2011 | Active | 0.64 |
| P121226 | Strengthening Capacity for Mobilizing and Engaging the Ethiopian Diaspora | TF 98159 | 2011 | Active | 0.49 |
| P121863 | Support to Accountancy Profession in Ethiopia | TF 98157 | 2011 | Active | 0.50 |
| P120040 | BEIA-Promotion of Ethanol Micro-Distilleries in Ethiopia | TF 96664 | 2011 | Active | 0.15 |
| P118700 | EFA FTI CF Grant 2 - GEQIP APL 1 | TF 97263 | 2011 | Active | 98.00 |
| P129534 | Ethiopia Protection of Basic Services Social Accountability Program | TF 99878 | 2012 | Active | 7.50 |

| | | | | | |
|----------------------|---|----------|------|--------|-----------------|
| P129151 | Ethiopia Disaster Risk Management Country Plan Project, Phase I | TF 11209 | 2012 | Active | 1.28 |
| P127507 | Agricultural Growth Project - Additional Financing | TF 11306 | 2012 | Active | 50.00 |
| P125487 | Ethiopia: Support to Artisan Miners (JSDF) | TF 98807 | 2012 | Active | 2.87 |
| P113032 | ET: Agricultural Growth Program | TF 99729 | 2012 | Active | 15.48 |
| P115154 | Ethiopia: TFSCB Data Systems and economy-Wide Analysis Project | TF 95746 | 2010 | 2012 | 0.17 |
| P113220 | Productive Safety Net APL III | TF 10672 | 2012 | 2012 | 4.10 |
| | | TF 99450 | 2011 | Active | 56.38 |
| | | TF 99474 | 2011 | 2012 | 55.10 |
| P124074 | Ethiopia-FCPF Redd Readiness | TF 94541 | 2010 | 2011 | 0.20 |
| P106855 | General Education Quality Improvement Project - APL 1 (GEQIP) | TF 94224 | 2009 | Active | 70.00 |
| | | TF 93227 | 2010 | Active | 164.73 |
| P114913 | ET: Flood risks prevention in Ethiopia | TF 93300 | 2009 | 2012 | 0.32 |
| P105651 | Ethiopia Electricity Access Rural Expansion Project, Phase II - GPOBA | TF 92600 | 2009 | Active | 6.20 |
| | | TF 92601 | 2009 | Active | 1.80 |
| P103022 | Ethiopia Protection of Basic Services Program Phase II Project | TF 55149 | 2006 | 2009 | 0.50 |
| | | TF 94641 | 2009 | 2012 | 472.20 |
| | | TF 95106 | 2010 | 2012 | 37.00 |
| | | TF 97830 | 2012 | Active | 0.36 |
| | | TF 97831 | 2012 | Active | 2.61 |
| P115788 | Development Marketplace for the African Diaspora in Europe Winning Projects | TF 93792 | 2009 | 2011 | 0.05 |
| P114843 | PHRD Ethiopia: Cluster Development Program | TF 93486 | 2009 | 2012 | 0.24 |
| P090789 | ET-Sustainable Land Management Program (FY08) | TF 92320 | 2009 | Active | 9.00 |
| P096323 | Tana & Beles Integrated Water Resources Development | TF 95045 | 2010 | Active | 3.48 |
| | | TF 56564 | 2006 | 2009 | 1.00 |
| P106228 | Ethiopia Nutrition (FY08) | TF 10247 | 2008 | 2009 | 0.55 |
| | | TF 93946 | 2009 | Active | 1.81 |
| | | TF 90631 | 2012 | Active | 0.65 |
| P101711 | ET-Strengthening Capacity (FY09) | TF 90921 | 2008 | 2009 | 0.35 |
| P098093 | Productive Safety Nets APL II | TF 95296 | 2007 | 2010 | 113.85 |
| | | TF 58248 | 2010 | 2010 | 28.26 |
| Total FY08-12 | | | | | 2,192.70 |

Source: Ethiopia CAS, CASPR and WB Business Warehouse Table 2a.1, 2a.4 and 2a.7 as of 07/06/2012

Annex Table 4: Planned and Actual Analytical and Advisory Work, FY08-12

| AAA ID | Economic and Sector Work | Proposed FY | Delivered to Client FY | Output Type |
|---------|--|-------------|------------------------|-------------|
| | Programmed (CAS FY09-12) | | | |
| P092926 | Ethiopia Investment Climate Assessment using panel data (ESW) | 2008 | 2008 | Report |
| P096521 | Health Financing Note Ethiopia (ESW) | 2008 | 2008 | Report |
| P100467 | Ethiopia Rural Investment Climate Assessment (ESW) | 2008 | 2009 | Report |
| P104836 | Ethiopia Education and Nutrition Linkages (ESW) | 2008 | 2008 | Report |
| P108425 | Ethiopia: Accounting & Auditing ROSC (FY08) (ESW) | 2008 | 2008 | Report |
| P101236 | ET-Public Finance Review JBAR (FY08) (ESW) | 2008 | 2008 | Report |
| | Regional Growth Report: Amhara | 2008 | 2008* | |
| | Regional Growth Report: Addis Ababa | 2009 | 2008* | |
| P097324 | ET-Gender (FY08) | 2009 | 2008 | Report |
| | Strategic Review of Road Sector Development | 2009 | 2010 | |
| | Financial Sector Review | 2009 | Dropped | |
| P090210 | Review of Expend. in Rural Dev | 2009 | 2008 | Report |
| P108859 | Eastern Nile Strategic Basin Assessment and Assistance Strategy | 2010 | 2012 | Report |
| | Development Policy Review (DPR) | 2010 | Dropped | |
| | Rural Economy Survey | 2011 | Dropped | |
| | Investment Climate Assessment (ICA) update | 2011 | Dropped | |
| P113142 | Adaptation to Climate Variability and Change in Ethiopia (ESW) | 2011 | 2011 | Report |
| P101588 | ET PER 2010 (ESW) | 2011 | 2011 | Report |
| | Innovation for Development | 2011 | Delayed | |
| P118721 | Policy Note on Land Administration (ESW) | 2011 | 2011 | Policy Note |
| | Roads Rural Access Development | 2011 | Dropped | |
| P076117 | Public Expenditure Notes 2012 (ESW) | 2012 | 2012 | Policy Note |
| P119840 | Ethiopia Tourism Sector Competitiveness Report (ESW) | 2012 | 2012 | Policy Note |
| P115042 | ET: Country Fiduciary Assessment (ESW) | 2012 | 2012 | Report |
| P117761 | Ethiopia Decentralized Service Delivery SP HNP ED (ESW) | 2012 | Delayed | Report |
| | Regional Growth | 2012 | Dropped | |
| | Service Trade & Growth | 2012 | Dropped | |
| | Non-programmed | | | |
| P097323 | ET Economic Growth | | 2008 | Report |
| P107749 | Ethiopia - Results Monitoring | | 2008 | Report |
| P110947 | Economic modeling of adaptation to climate change - Ethiopia pilot study | | 2009 | Report |
| P109708 | Ethiopia Policy Notes Macro-Fiscal Sustainability Issues-Growth | | 2009 | Policy Note |
| P101237 | ET-Public Finance Review -Water (FY09) | | 2009 | Report |
| P113410 | Ethiopia - Secondary Education Policy Note | | 2010 | Policy Note |
| P121375 | Designing and Implementing a Rural Safety Net in a Low Income Setting: Lessons Learned from ET's Productive Safety Net Program 05-09 | | 2010 | Report |
| P098403 | Ethiopia Urban Poverty | | 2010 | Policy Note |
| P129511 | Ethiopia Country Portfolio Performance Review (CPPR) | | 2012 | Report |
| P079325 | ET Policy Notes | | 2012 | Policy Note |
| P123130 | Ethiopia Post-Basic Education | | 2012 | Report |
| P096955 | ET Professional Services | | 2012 | Policy Note |

| AAA ID | Technical Assistance | Proposed FY | Delivered to Client FY | Output Type |
|---------|---|-------------|---|--------------------------------|
| | Programmed (CAS FY09-12) | | | |
| | Joint Governance Asst. & Measurement (JGAM) | 2010 | Transformed in a joint donor trust fund with DFID, CIDA and RNE | |
| | Non-programmed | | | |
| P106704 | PRTSR-Ethiopia-Review of Poverty Reduction and Transport Strategies | | 2008 | Client Document Review |
| P114305 | Ethiopia Public Private Forum | | 2009 | Knowledge-Sharing Forum |
| P114002 | Ethiopia Telecoms Reform Options | | 2009 | "How-To" Guidance |
| P118107 | Urban safety net-Ethiopia | | 2010 | "How-To" Guidance |
| P119229 | ET-Portfolio FM arrangement Study | | 2010 | Institutional Development Plan |
| P119179 | ET-Capacity Building Technical Assistance | | 2010 | Knowledge-Sharing Forum |
| P114554 | Ethiopia Financial Sector Review | | 2010 | "How-To" Guidance |
| P117080 | Health Systems for Outcomes - Ethiopia | | 2011 | "How-To" Guidance |
| P126028 | ET Procurement Reforms Follow Up | | 2011 | "How-To" Guidance |
| P126027 | Ethiopia Follow Up of Procurement Reforms | | 2011 | "How-To" Guidance |
| P118493 | Ethiopia - Follow up on Procurement Reforms | | 2011 | "How-To" Guidance |
| P118446 | ET Follow up on Procurement Reforms | | 2011 | "How-To" Guidance |
| P117750 | Ethiopia: Mining Sector Support and EITI | | 2011 | "How-To" Guidance |
| P116038 | ET-Health Syst. Strength. & Dial. (FY12) | | 2012 | Advisory Services Document |
| P119180 | Ethiopia A&A ROSC follow up | | 2012 | Institutional Development Plan |
| P099439 | ET-Poverty and Migration | | 2012 | Advisory Services Document |

Source: Ethiopia CAS, CASPR and WB Business Warehouse Table 2a.1, 2a.4 and 2a.7 as of 07/06/2012

*Project not financed by the Bank

Annex Table 5: IEG Project Ratings for Ethiopia, Exit FY08-FY12

| Exit FY | Proj ID | Project Name | Total Evaluated (US\$M) | IEG Outcome | IEG Risk to Development Outcome* |
|---------|---------|--|-------------------------|---------------------------|----------------------------------|
| 2009 | P050938 | ET-Dec Serv Del CB (FY03) | 27.9 | Moderately Satisfactory | Negligible to Low |
| 2009 | P057770 | ET-Cultural Heritage LIL (FY02) | 4.9 | Moderately Satisfactory | Moderate |
| 2009 | P075915 | ET-Pastoral Community Dev APL (FY03) | 31.7 | Moderately Unsatisfactory | Significant |
| 2009 | P098093 | ET-Productive Safety Nets II (FY07) | 207.9 | Satisfactory | Moderate |
| 2010 | P044613 | ET-RSDP APL1 (FY03) | 142.3 | Moderately Satisfactory | Significant |
| 2010 | P078458 | ET-ICT Assisted Dev SIM (FY05) | 16.4 | Moderately Satisfactory | High |
| 2010 | P078692 | ET-Post Secondary Education SIL (FY05) | 22.7 | Moderately Unsatisfactory | Significant |
| 2011** | P113156 | ET-Global Food Crisis Response Pro | 244.0 | Moderately Unsatisfactory | Moderate |

Source: WB Business Warehouse Table 4a.6 as of as of 07/06/2012.

* With IEG new methodology for evaluating projects, institutional development impact and sustainability are no longer rated separately.

Annex Table 6. IEG Project Ratings for Ethiopia and Comparators, Exit FY08-12

| Region | Total Evaluated (\$M) | Total Evaluated (No) | Outcome % Sat (\$) | Outcome % Sat (No) | RDO% Moderate or Lower Sat (\$)* | RDO% Moderate or Lower Sat (No)* |
|--------------|-----------------------|----------------------|--------------------|--------------------|----------------------------------|----------------------------------|
| Ethiopia | 697.9 | 8 | 57.2 | 62.5 | 69.5 | 50.0 |
| Eritrea | 127.8 | 5 | 74.0 | 50.0 | 0.0 | 0.0 |
| Egypt | 1,205.9 | 9 | 92.2 | 88.9 | 86.7 | 66.7 |
| Kenya | 91.3 | 4 | 61.3 | 75.0 | 16.9 | 25.0 |
| AFR | 10,129.6 | 187 | 77.7 | 66.1 | 37.9 | 38.7 |
| World | 56,783.5 | 743 | 85.1 | 74.0 | 68.7 | 56.2 |

Source: WB Business Warehouse Table 4a.5 as of as of 07/10/2012.

* With IEG new methodology for evaluating projects, institutional development impact and sustainability are no longer rated separately.

Annex Table 7. Portfolio Status for Ethiopia and Comparators, FY08-12

| Fiscal year | 2008 | 2009 | 2010 | 2011 | 2012 |
|------------------|-----------|-----------|-----------|-----------|-----------|
| Ethiopia | | | | | |
| # Proj | 28 | 29 | 24 | 24 | 23 |
| # Proj At Risk | 8 | 5 | 6 | 5 | 3 |
| % Proj At Risk | 29 | 17 | 25 | 21 | 13 |
| Net Comm Amt | 2,715.1 | 3,469.1 | 3,699.3 | 4,079.3 | 4,580.2 |
| Comm At Risk | 815.2 | 261.0 | 767.1 | 300.5 | 97.0 |
| % Commit at Risk | 30.0 | 7.5 | 20.7 | 7.4 | 2.1 |
| Eritrea | | | | | |
| # Proj | 6 | 5 | 3 | 2 | .. |
| # Proj At Risk | 3 | 5 | 3 | 1 | .. |
| % Proj At Risk | 50 | 100 | 100 | 50 | .. |
| Net Comm Amt | 238.8 | 178.8 | 87.3 | 75.3 | .. |
| Comm At Risk | 172.5 | 178.8 | 87.3 | 45.0 | .. |
| % Commit at Risk | 72.2 | 100.0 | 100.0 | 59.8 | .. |
| Kenya | | | | | |
| # Proj | 15 | 16 | 19 | 21 | 20 |
| # Proj At Risk | 2 | 4 | 3 | 2 | 4 |
| % Proj At Risk | 13 | 25 | 16 | 10 | 20 |
| Net Comm Amt | 1,003.8 | 1,428.8 | 2,020.2 | 2,325.2 | 2,972.3 |
| Comm At Risk | 90.5 | 145.0 | 234.5 | 154.5 | 166.5 |
| % Commit at Risk | 9.0 | 10.1 | 11.6 | 6.6 | 5.6 |
| Egypt | | | | | |
| # Proj | 17 | 14 | 18 | 19 | 17 |
| # Proj At Risk | 1 | 3 | 1 | 2 | 5 |
| % Proj At Risk | 6 | 21 | 6 | 11 | 29 |
| Net Comm Amt | 1,981.4 | 1,786.6 | 3,378.9 | 3,876.8 | 3,807.1 |
| Comm At Risk | 20.0 | 285.0 | 145.0 | 57.2 | 402.1 |
| % Commit at Risk | 1.0 | 16.0 | 4.3 | 1.5 | 10.6 |
| Africa | | | | | |
| # Proj | 419 | 440 | 454 | 470 | 449 |
| # Proj At Risk | 94 | 131 | 137 | 117 | 107 |
| % Proj At Risk | 22 | 30 | 30 | 25 | 24 |
| Net Comm Amt | 23,306.8 | 28,177.8 | 34,188.5 | 37,466.4 | 38,775.0 |
| Comm At Risk | 5,890.2 | 6,950.5 | 9,494.2 | 7,949.7 | 6,139.8 |
| % Commit at Risk | 25.3 | 24.7 | 27.8 | 21.2 | 15.8 |
| World | | | | | |
| # Proj | 1,525 | 1,552 | 1,590 | 1,595 | 1,487 |
| # Proj At Risk | 276 | 344 | 366 | 337 | 332 |
| % Proj At Risk | 18 | 22 | 23 | 21 | 22 |
| Net Comm Amt | 106,761.7 | 131,076.4 | 158,287.4 | 168,248.7 | 168,013.5 |
| Comm At Risk | 18,428.2 | 19,929.9 | 28,186.1 | 22,978.5 | 23,596.2 |
| % Commit at Risk | 17.3 | 15.2 | 17.8 | 13.7 | 14.0 |

Source: WB Business Warehouse Table 3a.4 as of 07/10/2012.

**Annex Table 8. IDA Net Disbursements and Charges Summary Report for Ethiopia
(in US\$ million)**

| FY | Disb. Amt. | Repay Amt. | Net Amt. | Charges | Fees | Net Transfer |
|------------------------------|----------------|-------------|----------------|------------|-------------|----------------|
| 2008 | 441.1 | 1.5 | 439.6 | 2.4 | 4.5 | 432.7 |
| 2009 | 915.3 | 3.6 | 911.8 | 0.0 | 7.3 | 904.5 |
| 2010 | 714.6 | 3.8 | 710.8 | 0.0 | 9.8 | 701.1 |
| 2011 | 736.2 | 5.9 | 730.3 | 0.0 | 13.3 | 716.9 |
| 2012 | 725.4 | 7.8 | 717.6 | 0.0 | 16.5 | 701.2 |
| Total (FY08-FY12) | 3,532.6 | 22.6 | 3,510.1 | 2.4 | 51.3 | 3,456.4 |

Source: WB Loan Kiosk, Net Disbursement and Charges Report as of 07/09/2012

Annex Table 9. Total Net Disbursements of Official Development Assistance and Official Aid, 2008- 2010 (in US\$ million)

| Development Partners | 2008 | 2009 | 2010 | 2008-2010 |
|---------------------------------------|----------------|----------------|----------------|-----------------|
| Bilaterals | | | | |
| Australia | 10.13 | 4.16 | 2.33 | 16.62 |
| Austria | 9.75 | 12.66 | 9.71 | 32.12 |
| Belgium | 8.77 | 6.3 | 4.18 | 19.25 |
| Canada | 152.55 | 87.18 | 140.38 | 380.11 |
| Denmark | 7.52 | 15.37 | 7.76 | 30.65 |
| Finland | 15.99 | 23.49 | 25.64 | 65.12 |
| France | 18.74 | 38.27 | 13.3 | 70.31 |
| Germany | 98.25 | 79.82 | 96.45 | 274.52 |
| Greece | 3.11 | 2.23 | 1.39 | 6.73 |
| Ireland | 72.67 | 52.47 | 49.23 | 174.37 |
| Italy | 65.86 | 53.97 | 18.31 | 138.14 |
| Japan | 47.12 | 97.76 | 93.89 | 238.77 |
| Korea | 4.39 | 4.16 | 10.2 | 18.75 |
| Luxembourg | 1.43 | 1.63 | 0.74 | 3.8 |
| Netherlands | 113.63 | 85.9 | 54.25 | 253.78 |
| New Zealand | 0.34 | 0.4 | .. | 0.74 |
| Norway | 37.28 | 37.81 | 32.56 | 107.65 |
| Portugal | 0.21 | 0.02 | .. | 0.23 |
| Spain | 60.54 | 94 | 39.46 | 194 |
| Sweden | 46.94 | 44.6 | 39.42 | 130.96 |
| Switzerland | 3.15 | 5.4 | 6.23 | 14.78 |
| United Kingdom | 253.68 | 342.92 | 406.95 | 1003.55 |
| United States | 811.37 | 726.04 | 875.34 | 2412.75 |
| DAC Countries, Total | 1843.42 | 1816.56 | 1927.72 | 5587.7 |
| Czech Republic | 1.21 | 1.03 | 1.22 | 3.46 |
| Hungary | .. | 0.12 | 0.13 | 0.25 |
| Iceland | .. | 0.28 | 0.28 | 0.56 |
| Israel | 20.18 | 7.89 | 15.28 | 43.35 |
| Kuwait (KFAED) | 6.16 | 4.94 | 15.51 | 26.61 |
| Lithuania | 0.01 | .. | .. | 0.01 |
| Poland | 0.45 | 0.27 | 0.1 | 0.82 |
| Romania | .. | 0.05 | .. | 0.05 |
| Slovak Republic | .. | 0.01 | 0.06 | 0.07 |
| Slovenia | .. | .. | 0.03 | 0.03 |
| Thailand | 0.01 | 0.04 | .. | 0.05 |
| Turkey | 2.96 | 4.02 | 2.45 | 9.43 |
| United Arab Emirates | 0.95 | 0.91 | 0.23 | 2.09 |
| Non-DAC Countries, Total | 31.93 | 19.56 | 35.29 | 86.78 |
| Multilaterals | | | | |
| AfDB | 13.96 | 5.79 | 5.5 | 25.25 |
| AfDF | 131.05 | 307.14 | 149.46 | 587.65 |
| BADEA | 10.4 | 6.51 | 7.69 | 24.6 |
| EU Institutions | 447.14 | 202.47 | 237.56 | 887.17 |
| GAVI | 35.44 | 37.77 | 19.87 | 93.08 |
| GEF | 18.84 | 0.81 | 2.82 | 22.47 |
| Global Fund | 144.33 | 130.47 | 256.69 | 531.49 |
| IAEA | 0.68 | 0.92 | 0.72 | 2.32 |
| IDA | 546.22 | 1037.53 | 664.93 | 2248.68 |
| IFAD | 3.81 | -1.09 | 13.37 | 16.09 |
| IMF (Concessional Trust Funds) | .. | 164.94 | 122.39 | 287.33 |
| Isl.Dev Bank | .. | .. | 0.36 | 0.36 |
| Nordic Dev.Fund | 1.01 | 3.67 | 2.38 | 7.06 |
| OFID | 3.72 | 1.68 | 3.81 | 9.21 |
| UNAIDS | 1.59 | 1.99 | 1.6 | 5.18 |
| UNDP | 21.94 | 17.35 | 17.11 | 56.4 |
| UNFPA | 5.43 | 6.1 | 5.04 | 16.57 |
| UNHCR | 4.87 | 6.16 | 4.44 | 15.47 |
| UNICEF | 45.85 | 35.93 | 42.74 | 124.52 |
| UNTA | 1.14 | .. | .. | 1.14 |
| WFP | 15.93 | 16.57 | 3.72 | 36.22 |
| Multilateral, Total | 1453.35 | 1982.71 | 1562.2 | 4998.26 |
| All Development Partners Total | 3328.7 | 3818.83 | 3525.21 | 10672.74 |

Source: OECD DAC Online database, Table 2a. Destination of Official Development Assistance and Official Aid - Disbursements, as of 07/09/2012.

Annex Table 10: Economic and Social Indicators for Ethiopia and Comparators, 2008- 2011

| Series Name | Ethiopia | | | | Ethiopia | Eritrea | Egypt, Arab Rep. | Kenya | Sub-Saharan Africa (all income levels) | World |
|--|----------|----------|----------|----------|-------------------|---------|------------------|----------|--|--------------|
| | 2008 | 2009 | 2010 | 2011 | Average 2008-2011 | | | | | |
| Growth and Inflation | | | | | | | | | | |
| GDP growth (annual %) | 10.8 | 8.8 | 9.9 | 7.3 | 9.2 | 1.3 | 4.7 | 3.6 | 4.1 | 1.5 |
| GDP per capita growth (annual %) | 8.4 | 6.5 | 7.6 | 5.0 | 6.9 | -1.8 | 2.9 | 0.9 | 1.5 | 0.4 |
| GNI per capita, PPP (current international \$) | 880.0 | 950.0 | 1030.0 | 1110.0 | 992.5 | 547.5 | 5947.5 | 1625.0 | 2127.5 | 10935.6 |
| GNI, Atlas method (current US mil. \$) | 22,781.5 | 28,571.4 | 32,342.1 | 33,825.1 | 29,380.0 | 1,714.3 | 182,487.9 | 31,541.9 | 993,936.2 | 61,583,607.0 |
| Inflation, consumer prices (annual %) | 44.4 | 8.5 | 8.1 | 33.2 | 23.6 | .. | 12.8 | 13.4 | .. | .. |
| Composition of GDP (%) | | | | | | | | | | |
| Agriculture, value added (% of GDP) | 43.9 | 50.8 | 47.7 | 41.9 | 46.1 | 16.0 | 13.7 | 25.3 | 12.6 | 2.8 |
| Industry, value added (% of GDP) | 13.0 | 10.8 | 14.3 | 12.6 | 12.7 | 24.6 | 37.3 | 19.5 | 30.7 | 26.2 |
| Services, etc., value added (% of GDP) | 43.1 | 38.5 | 38.0 | 45.5 | 41.3 | 59.4 | 49.0 | 55.2 | 56.7 | 71.0 |
| Gross fixed capital formation (% of GDP) | 19.9 | 22.5 | 21.5 | 19.0 | 20.7 | .. | 19.8 | 20.7 | 214.9 | 20.1 |
| Gross domestic savings (% of GDP) | 0.4 | 4.1 | 0.4 | 1.8 | 1.7 | .. | 14.1 | 6.8 | 195.3 | 20.1 |
| External Accounts | | | | | | | | | | |
| Exports of goods and services (% of GDP) | 11.4 | 10.6 | 11.4 | 11.7 | 11.3 | 4.5 | 25.7 | 26.5 | 32.3 | 27.6 |
| Imports of goods and services (% of GDP) | 30.8 | 28.9 | 32.5 | 28.9 | 30.3 | 23.3 | 31.6 | 40.5 | 35.5 | 27.9 |
| Current account balance (% of GDP) | -6.8 | -6.9 | -1.4 | .. | -5.0 | .. | -1.6 | -6.6 | .. | .. |
| External debt stocks (% of GNI) | 10.8 | 15.8 | 24.1 | .. | 16.9 | 57.9 | 18.1 | 26.6 | .. | .. |
| Total debt service (% of GNI) | 0.4 | 0.3 | 0.6 | .. | 0.5 | 1.1 | 1.6 | 1.3 | 1.4 | .. |
| Total reserves in months of imports | 1.1 | 2.4 | .. | .. | 1.7 | .. | 6.7 | 3.5 | 6.0 | 13.4 |
| Fiscal Accounts ^{1/} | | | | | | | | | | |
| Revenue (% of GDP) | 12.0 | 12.2 | .. | .. | 12.1 | 18.2* | 23.3 | 22* | .. | .. |
| Total Expenditure (% of GDP) | 17.2 | 18.4 | .. | .. | 17.8 | 46.4* | 31.2 | 28.2* | .. | .. |
| Overall Balance Including Grants (% of GDP) | 0.9 | -3 | .. | .. | -1.1 | -25.4 | -6.8 | -5.3 | .. | .. |
| Public Sector Debt (% of GDP) | 39.6 | 41 | .. | .. | 40.3 | 175.2* | 61.8 | 44.4* | .. | .. |
| Social Indicators | | | | | | | | | | |
| Health | | | | | | | | | | |
| Life expectancy at birth, total (years) | 57.5 | 58.1 | 58.7 | .. | 58.1 | 60.6 | 72.7 | 55.8 | 53.7 | 69.4 |
| Immunization, DPT (% of children ages 12-23 months) | 81.0 | 79.0 | 86.0 | .. | 82.0 | 99.0 | 97.0 | 84.0 | 74.5 | 84.4 |
| Improved sanitation facilities (% of population with access) | 18.0 | 20.0 | 21.0 | .. | 19.7 | 14.0 | 95.0 | 31.3 | 30.4 | 62.0 |
| Improved water source (% of population with access) | 42.0 | 44.0 | 44.0 | .. | 43.3 | 61.0 | 99.0 | 58.0 | 60.7 | 87.9 |

| Series Name | Ethiopia | | | | Ethiopia | Eritrea | Egypt, Arab Rep. | Kenya | Sub-Saharan Africa (all income levels) | World |
|--|----------|-------|-------|------|-------------------|---------|------------------|-------|--|-------|
| | 2008 | 2009 | 2010 | 2011 | Average 2008-2011 | | | | | |
| Mortality rate, infant (per 1,000 live births) | 71.2 | 69.5 | 67.8 | .. | 69.5 | 43.8 | 20.0 | 56.2 | 78.3 | 42.0 |
| Population | | | | | | | | | | |
| Population, total (in million) | 79 | 81 | 83 | 85 | 82 | 5 | 80 | 40 | 844 | 6,855 |
| Population growth (annual %) | 2.2 | 2.2 | 2.1 | 2.1 | 2.2 | 3.0 | 1.8 | 2.6 | 2.5 | 1.2 |
| Urban population (% of total) | | | 17.6 | | 17.6 | 21.6 | 42.8 | 22.2 | 36.9 | 50.3 |
| Education | | | | | | | | | | |
| School enrollment, preprimary (% gross) | 3.7 | 4.1 | 4.8 | .. | 4.2 | 13.3 | 23.7 | 49.8 | 17.3 | 46.8 |
| School enrollment, primary (% gross) | 102.3 | 102.3 | 101.6 | .. | 102.1 | 48.5 | 103.2 | 112.7 | 99.4 | 106.2 |
| School enrollment, secondary (% gross) | 33.3 | 33.9 | 35.7 | .. | 34.3 | 31.2 | 71.5 | 59.6 | 37.8 | 69.3 |

1/ IMF. Ethiopia June 2010 Article IV Consultations and The Economist Intelligence Unit database.

Source: WB World Development Indicators for all indicators excluding Fiscal Accounts data.

Annex Table 11. Ethiopia: Millennium Development Goals

| | 1990 | 1995 | 2000 | 2005 | 2010 |
|---|---------|---------|---------|---------|---------|
| Goal 1: Eradicate extreme poverty and hunger | | | | | |
| Employment to population ratio, 15+, total (%) | 76 | 75 | 75 | 80 | 80 |
| Employment to population ratio, ages 15-24, total (%) | 70 | 70 | 70 | 73 | 71 |
| GDP per person employed (constant 1990 PPP \$) | 1,303.0 | 1,272.0 | 1,385.0 | 1,543.0 | 2,184.0 |
| Income share held by lowest 20% | .. | 7.0 | 9.0 | 9.0 | .. |
| Malnutrition prevalence, weight for age (% of children under 5) | .. | .. | 42 | 35 | .. |
| Poverty gap at \$1.25 a day (PPP) (%) | .. | 21 | 16 | 10 | .. |
| Poverty headcount ratio at \$1.25 a day (PPP) (% of population) | .. | 61 | 56 | 39 | .. |
| Vulnerable employment, total (% of total employment) | .. | 91 | 91 | 91 | .. |
| Goal 2: Achieve universal primary education | | | | | |
| Literacy rate, youth female (% of females ages 15-24) | .. | 28 | .. | 39 | 33 |
| Literacy rate, youth male (% of males ages 15-24) | .. | 39 | .. | 62 | 56 |
| Persistence to last grade of primary, total (% of cohort) | .. | .. | 61 | 61 | 47 |
| Primary completion rate, total (% of relevant age group) | 23 | 15 | 23 | 43 | 72 |
| Total enrollment, primary (% net) | 30 | 24 | 40 | 63 | 82 |
| Goal 3: Promote gender equality and empower women | | | | | |
| Proportion of seats held by women in national parliaments (%) | .. | 2 | 2 | 21 | 28 |
| Ratio of female to male primary enrollment (%) | 65 | 59 | 65 | 83 | 91 |
| Ratio of female to male secondary enrollment (%) | 75 | 79 | 66 | 60 | 82 |
| Ratio of female to male tertiary enrollment (%) | 22 | 25 | 28 | 32 | 36 |
| Share of women employed in the nonagricultural sector (% of total nonagricultural employment) | .. | .. | 40.9 | 43.8 | .. |
| Goal 4: Reduce child mortality | | | | | |
| Immunization, measles (% of children ages 12-23 months) | 38 | 38 | 52 | 59 | 81 |
| Mortality rate, infant (per 1,000 live births) | 111 | 98 | 87 | 77 | 68 |
| Mortality rate, under-5 (per 1,000) | 184 | 161 | 141 | 122 | 106 |
| Goal 5: Improve maternal health | | | | | |
| Adolescent fertility rate (births per 1,000 women ages 15-19) | .. | 112 | 103 | 82 | 58 |
| Births attended by skilled health staff (% of total) | .. | .. | 6 | 6 | .. |
| Contraceptive prevalence (% of women ages 15-49) | 5 | 3 | 8 | 15 | .. |
| Maternal mortality ratio (modeled estimate, per 100,000 live births) | 950 | 880 | 700 | 510 | 350 |
| Pregnant women receiving prenatal care (%) | .. | .. | 27 | 28 | .. |
| Unmet need for contraception (% of married women ages 15-49) | .. | .. | 35 | 34 | .. |
| Goal 6: Combat HIV/AIDS, malaria, and other diseases | | | | | |
| Children with fever receiving antimalarial drugs (% of children under age 5 with fever) | .. | .. | 3 | 3 | .. |
| Condom use, population ages 15-24, female (% of females ages 15-24) | .. | .. | 2 | 2 | .. |
| Condom use, population ages 15-24, male (% of males ages 15-24) | .. | .. | 20 | 18 | .. |
| Incidence of tuberculosis (per 100,000 people) | 173 | 182 | 235 | 276 | 261 |
| Prevalence of HIV, female (% ages 15-24) | .. | .. | .. | .. | .. |
| Prevalence of HIV, male (% ages 15-24) | .. | .. | .. | .. | .. |
| Prevalence of HIV, total (% of population ages 15-49) | .. | .. | .. | .. | .. |
| Tuberculosis case detection rate (all forms) | 110 | 25 | 59 | 61 | 72 |
| Goal 7: Ensure environmental sustainability | | | | | |
| CO2 emissions (kg per PPP \$ of GDP) | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| CO2 emissions (metric tons per capita) | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Forest area (% of land area) | 14 | .. | 14 | 13 | 12 |
| Improved sanitation facilities (% of population with access) | 3 | 4 | 9 | 14 | 21 |
| Improved water source (% of population with access) | 14 | 20 | 29 | 37 | 44 |
| Marine protected areas (% of total surface area) | .. | .. | .. | .. | .. |
| Goal 8: Develop a global partnership for development | | | | | |
| Debt service (PPG and IMF only, % of exports, excluding workers' remittances) | 38 | 18 | 15 | 2 | 2 |
| Internet users (per 100 people) | 0.0 | 0.0 | 0.0 | 0.2 | 0.8 |
| Mobile cellular subscriptions (per 100 people) | 0 | 0 | 0 | 1 | 8 |
| Net ODA received per capita (current US\$) | 21 | 15 | 10 | 26 | 42 |
| Telephone lines (per 100 people) | 0 | 0 | 0 | 1 | 1 |
| Other | | | | | |
| Fertility rate, total (births per woman) | 7.0 | 7.0 | 6.0 | 5.0 | 4.0 |
| GNI per capita, Atlas method (current US\$) | 250 | 150 | 130 | 160 | 390 |
| GNI, Atlas method (current US\$) (billions) | 12.2 | 8.3 | 8.4 | 12.2 | 32.3 |
| Gross capital formation (% of GDP) | 12.9 | 18.0 | 20.3 | 23.0 | 21.5 |
| Life expectancy at birth, total (years) | 47 | 49 | 52 | 55 | 59 |
| Literacy rate, adult total (% of people ages 15 and above) | .. | 27 | .. | 36 | 30 |
| Population, total (millions) | 48.3 | 57.0 | 65.6 | 74.3 | 82.9 |
| Trade (% of GDP) | 14.4 | 25.4 | 36.0 | 50.6 | 43.9 |

Source: World Development Indicators database as of 07/09/2012.