ISS | AFRICAN FUTURES

Angola
Sectoral Scenarios for Angola

Jakkie Cilliers

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Sectoral Scenarios for Angola

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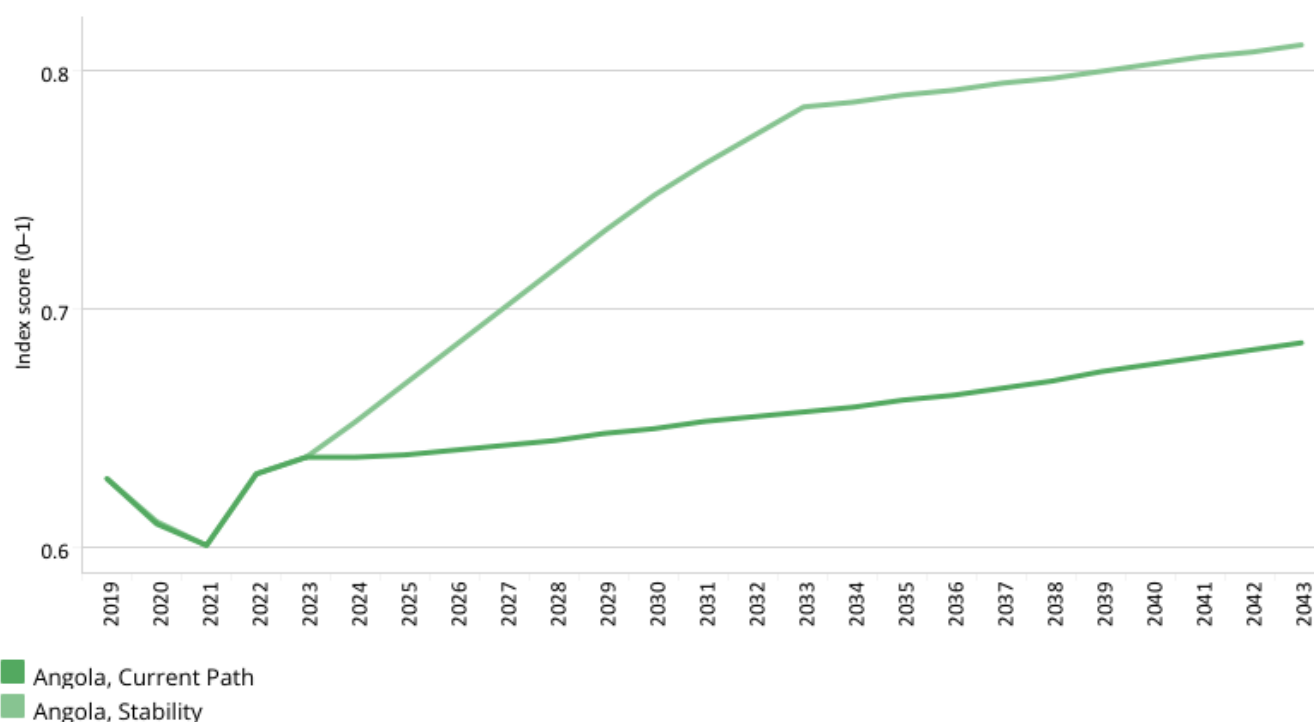
Stability scenario

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Chart 13: Governance security in CP and Stability scenario, 2019–2043
IFs index 0–1

Angola ▼

- Angola, Current Path
- Angola, Stability

Source: IFs 7.63 goverance security index using internal war and government risk

⚙ View on Tableau Public   ↶ ↷ ↺ ↻ ▼ | 🖵 ▼   ▢   ⦿ Share

The Stability scenario represents reasonable but ambitious reductions in risk of regime instability and lower levels of
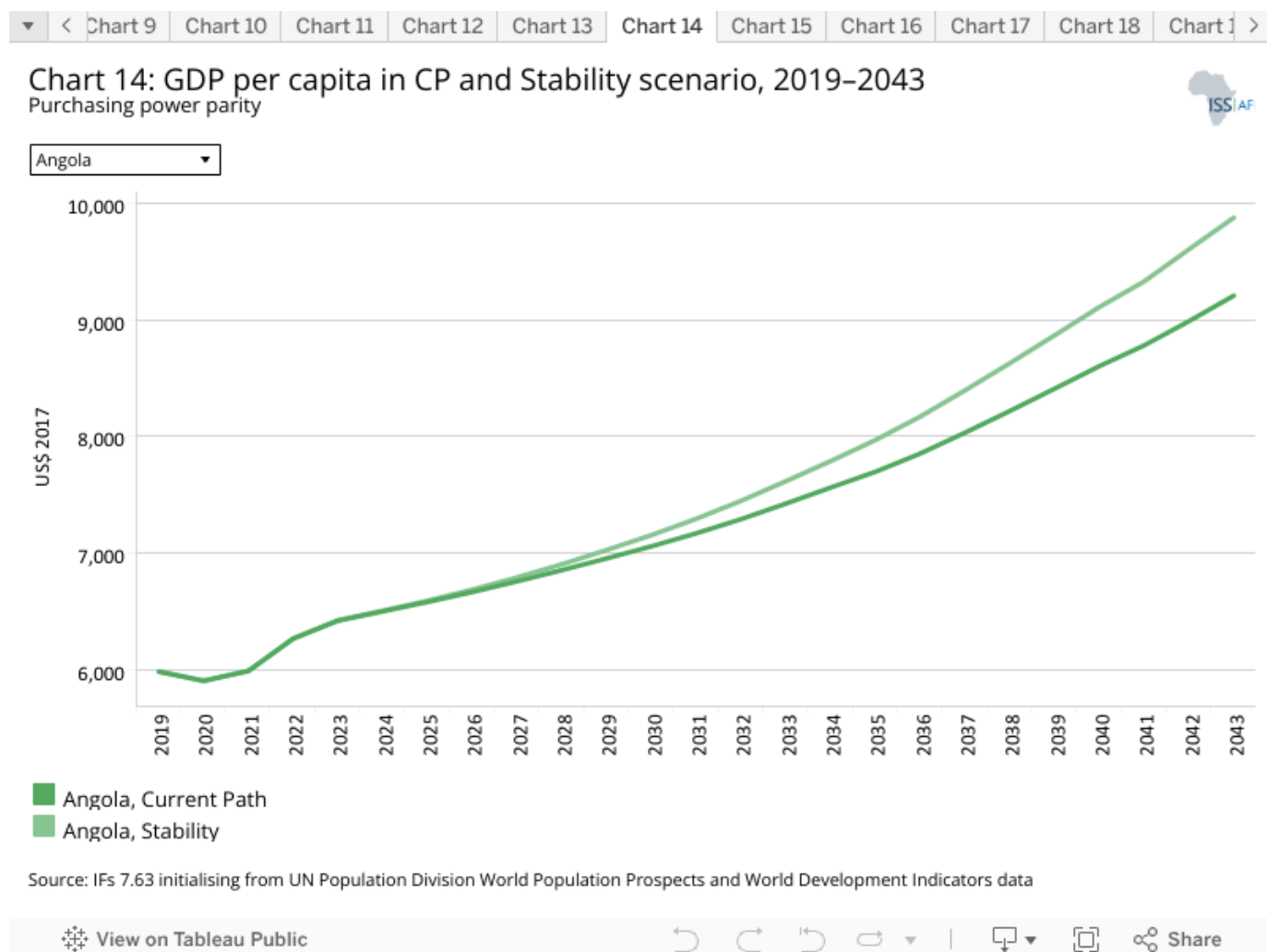
internal conflict. Stability is generally a prerequisite for other aspects of development and this would encourage inflows of foreign direct investment (FDI) and improve business confidence. Better governance through the accountability that follows substantive democracy is modelled separately.

The intervention is explained here in the thematic part of the website.

The governance security index captures the probability of internal war and vulnerability to conflict. Angola scores lower on this index than other lower middle-income African countries, reflecting its turbulent history and the nation's struggle to consolidate its democracy as it transitions away from its distinctly autocratic and authoritarian history. Because of its history of large-scale armed conflict, the IFs Government Security Index ranked Angola at a lowly 49th in Africa in 2019

Indeed, as is typical of resource-dependent countries, Angola's oil wealth has led to rent-seeking and corruption. Reports on conspicuous consumption abound as do tales of the extent to which a small elite has appropriated the country's wealth. According to Transparency International's corruption perception index, in 2021 Angola was ranked the 44th most corrupt country in the world. Moreover, the Financial Action Task Force only removed Angola from its money-laundering blacklist in 2016.

In the Stability scenario, Angola's score on the governance security index improves dramatically over the next decade and, by 2043, by 29% compared to the Current Path forecast. This improvement would in turn increase the country's levels of government capacity and societal inclusion, creating an environment in which peace can flourish. Conversely, Angola's score stagnates on the Current Path.

| ▼ | < | Chart 9 | Chart 10 | Chart 11 | Chart 12 | Chart 13 | **Chart 14** | Chart 15 | Chart 16 | Chart 17 | Chart 18 | Chart 1 | > |

Chart 14: GDP per capita in CP and Stability scenario, 2019–2043
Purchasing power parity

ISS AF

Angola ▼

Angola, Current Path
Angola, Stability

Source: IFs 7.63 initialising from UN Population Division World Population Prospects and World Development Indicators data

⊹ View on Tableau Public   ↶ ↷ ↺ ↻ ▼ | ⬚ ▼   ⬚   ⁰⁄₀ Share

The ambitious but attainable governance improvements modelled in the Stability scenario result in greater average income growth over the long term compared to the Current Path. Measured using the GDP per capita, average incomes reach US$9 872 by 2043 in the Stability scenario. On the Current Path, average incomes only reach US$9 205. Thus, in the Stability scenario, average incomes are approximately US$667 greater in 2043 than on the Current Path, reflecting the positive effect of greater stability in governance on the well-being of Angolans. A large part of that improvement is due to the reduction of defence expenditure in Angola that follows greater stability. Whereas, in 2019, government consumption on the military was at 3% of GDP and, in the Current Path forecast set to remain at that level to 2043, in the Stability scenario, military expenditure declines to 1.5% of GDP in 2043.
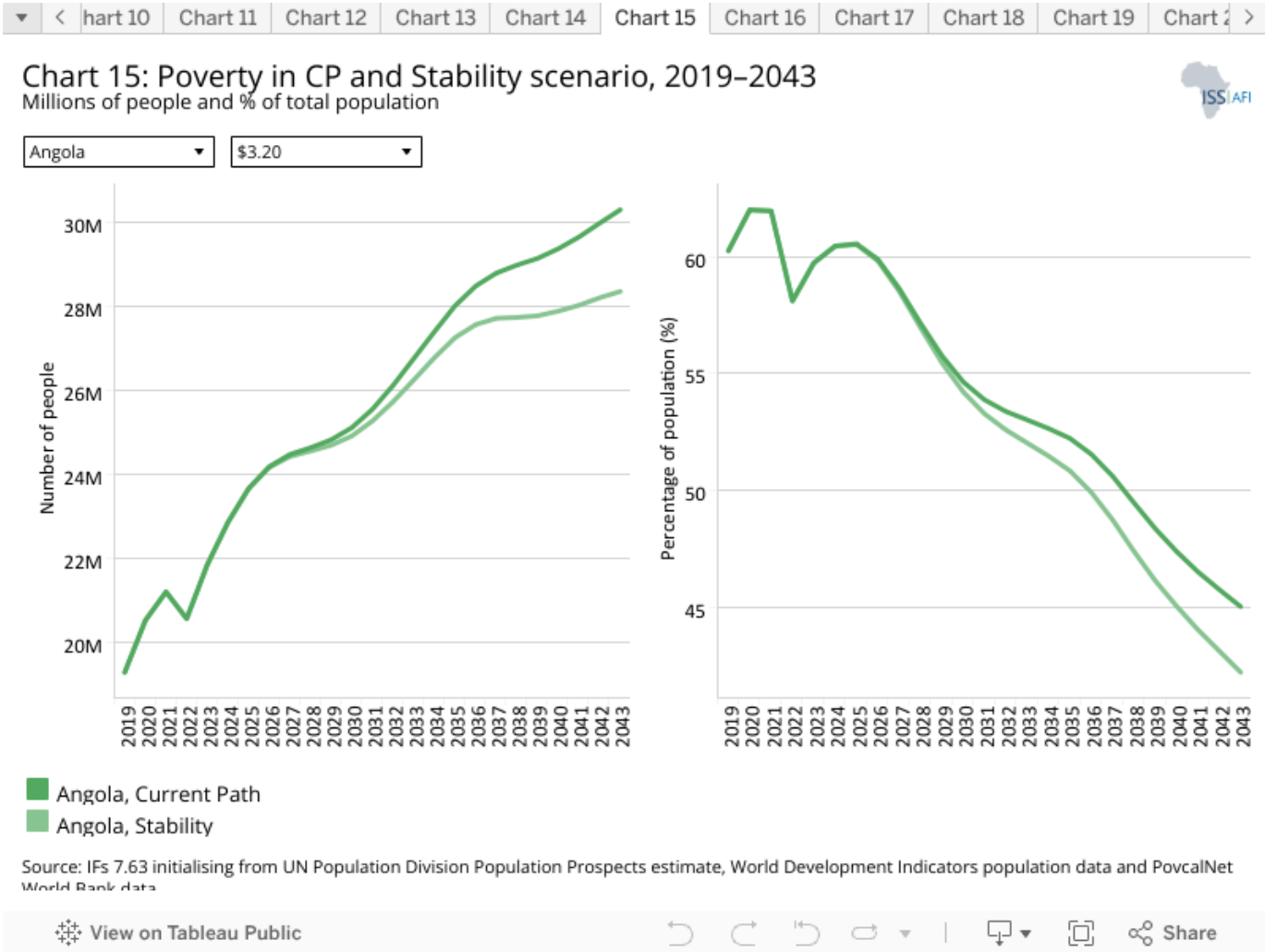
Chart 15: Poverty in CP and Stability scenario, 2019–2043
Millions of people and % of total population

In 2019, three out of every five Angolans (over 19 million people) were living in extreme poverty. On the Current Path, the share of the Angolan populations living in poverty will fall slightly to 45% by 2043, but the number of poor Angolans will continue growing owing to rapid population growth. The Stability scenario offers a slightly more optimistic future in which the poverty rate falls to 42% by 2043. However, even in the Stability scenario, the number of Angolans living in extreme poverty will continue to grow until the mid-2030s, reaching 28 million people by 2043. The underwhelming effect of the Stability scenario on poverty suggests that, even with improved governance and societal stability, poverty will continue to worsen in Angola without immediate efforts to address its key drivers — rapid population growth, low levels of educational attainment, and middling economic prospects.
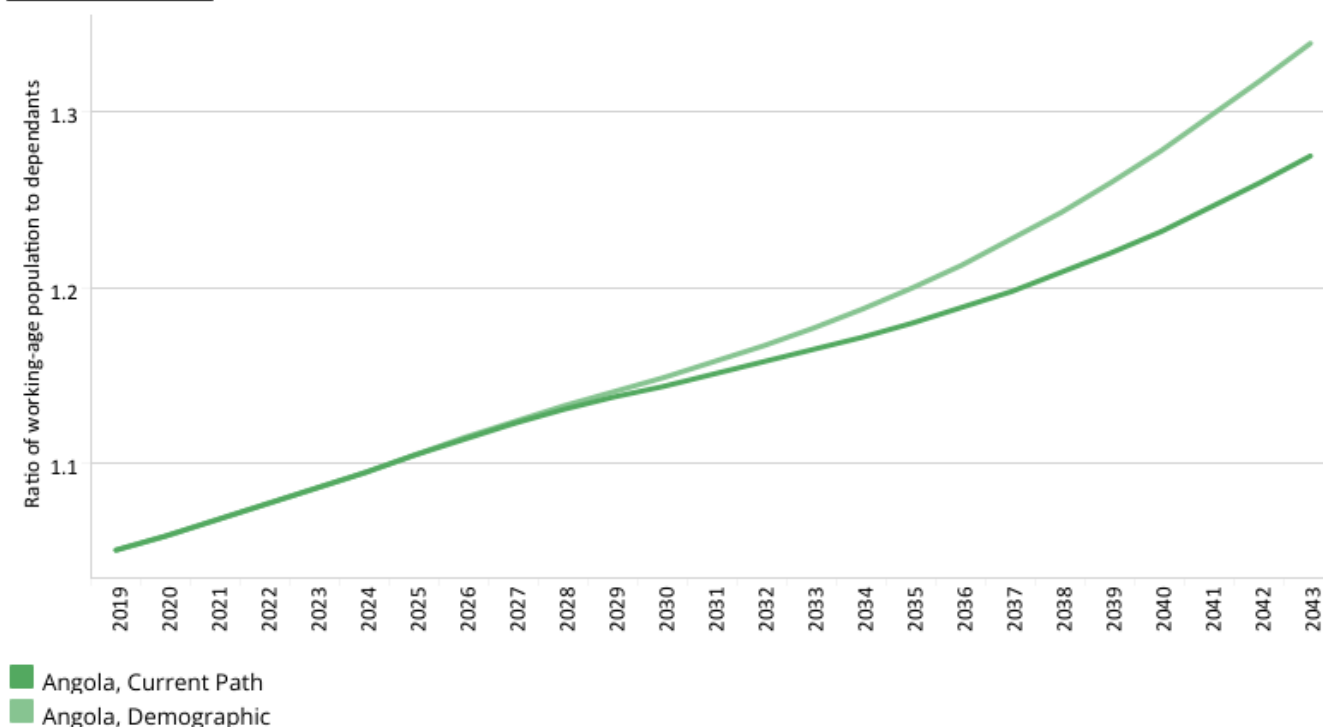
Demographic scenario

Chart 16: Demographic dividend in CP and Demog scenario, 2019–2043
Ratio of working-age population to dependants

ISS AFI

Angola ▼

■ Angola, Current Path
■ Angola, Demographic

Source: IFs 7.63 initialising from UN Population Division Population Prospects

⠿ View on Tableau Public   ↶ ↷ ↺ ↻ ▼ | ⬇▼ ⛶ ⊶ Share

This section presents the impact of a Demographic scenario that aims to hasten and increase the demographic dividend through reasonable but ambitious reductions in the communicable-disease burden for children under five, the maternal mortality ratio and increased access to modern contraception.

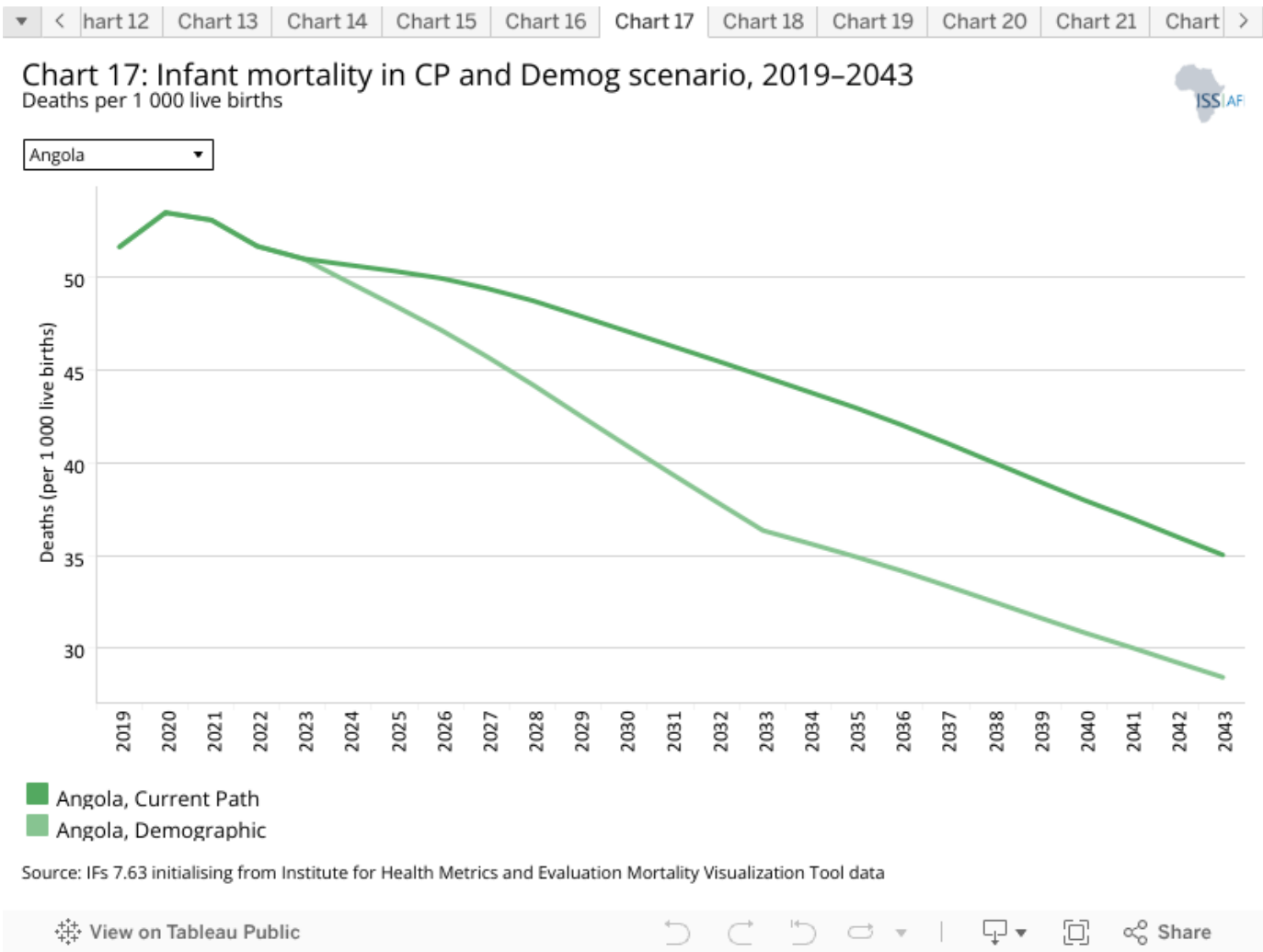The intervention is explained here in the thematic part of the website.

Demographers typically differentiate between a first, second and even a third demographic dividend. We focus here on the contribution of the size of the labour force (between 15 and 64 years of age) relative to dependants (children and the elderly) as part of the first dividend. A window of opportunity opens when the ratio of the working-age population to dependants is equal to or surpasses 1.7.

At present, Angola's population is just about equally divided between the working-age population and dependants. In both the Demographic scenario and in the Current Path forecast, the ratio of Angola's working-age population to its dependants will remain below 1.4 out to 2043. (In other words, Angola will have fewer than 14 working-age individuals for every 10 dependants by 2043).

This suggests that, even in the Demographic scenario, Angola will only have the potential to achieve a demographic dividend late in the second half of the century. Only then will it benefit from its most important economic asset: its large

labour force.

Angola could advance its demographic dividend, and in turn improve income growth more rapidly, by prioritising improving women and girls' access to education and healthcare — particularly reproductive healthcare.

Chart 17: Infant mortality in CP and Demog scenario, 2019–2043
Deaths per 1 000 live births

Source: IFs 7.63 initialising from Institute for Health Metrics and Evaluation Mortality Visualization Tool data

The infant mortality rate is the number of infant deaths per 1 000 live births and is an important marker of the overall quality of the health system in a country.

Health outcomes have generally improved in recent decades in Angola. Infant mortality, although still high compared to other lower middle-income African countries, dropped significantly to just over 51 deaths per live births in 2019. In the Current Path forecast, the infant mortality rate will continue to fall to 47 deaths per 1 000 live births by 2030 and 35 by 2043. However, the infant mortality rate decreases much more quickly in the Demographic scenario, falling to approximately 28 deaths per live births by 2043.

Maternal education is strongly correlated with reductions in child and infant mortality, underscoring the urgent need for greater investment in schooling for girls and women, especially in primary and secondary school.

Chart 18: GDP per capita in CP and Demog scenario, 2019–2043
Purchasing power parity
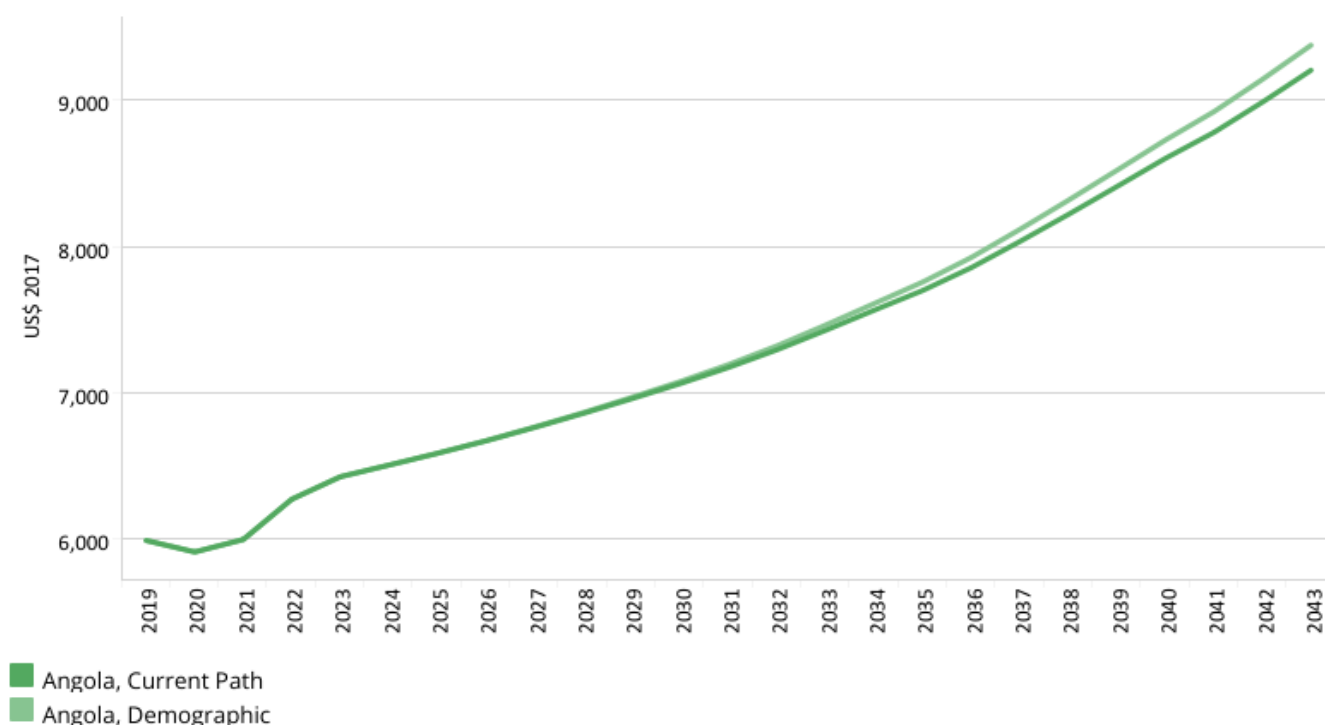
Angola ▼

■ Angola, Current Path
■ Angola, Demographic

Source: IFs 7.63 initialising from UN Population Division World Population Prospects and World Development Indicators data

⁙ View on Tableau Public   ↺ ↻ ↺ ↻ ▾ | ⬇▾ ⛶ ⊷ Share

In the Current Path forecast, Angola's average incomes will outpace those of other lower middle-income countries in Africa and reach US$7 060 by 2030 and US$9 205 by 2043. In the Demographic scenario, average incomes grow just slightly more quickly, reaching US$9 376 by 2043 (US$171 greater than the amount projected on the Current Path). That the Demographic scenario only achieves a modest improvement in incomes — and only in the long term — shows that more concerted efforts by the government to improve livelihoods will be necessary to improve Angolans' quality of living.

Chart 19: Poverty in CP and Demog scenario, 2019–2043
Millions of people and % of total population

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| Angola ▼ | $3.20 ▼ |

■ Angola, Current Path   ■ Angola, Demographic

Source: IFs 7.63 initialising from UN Population Division Population Prospects estimate, World Development Indicators population data and PovcalNet World Bank data

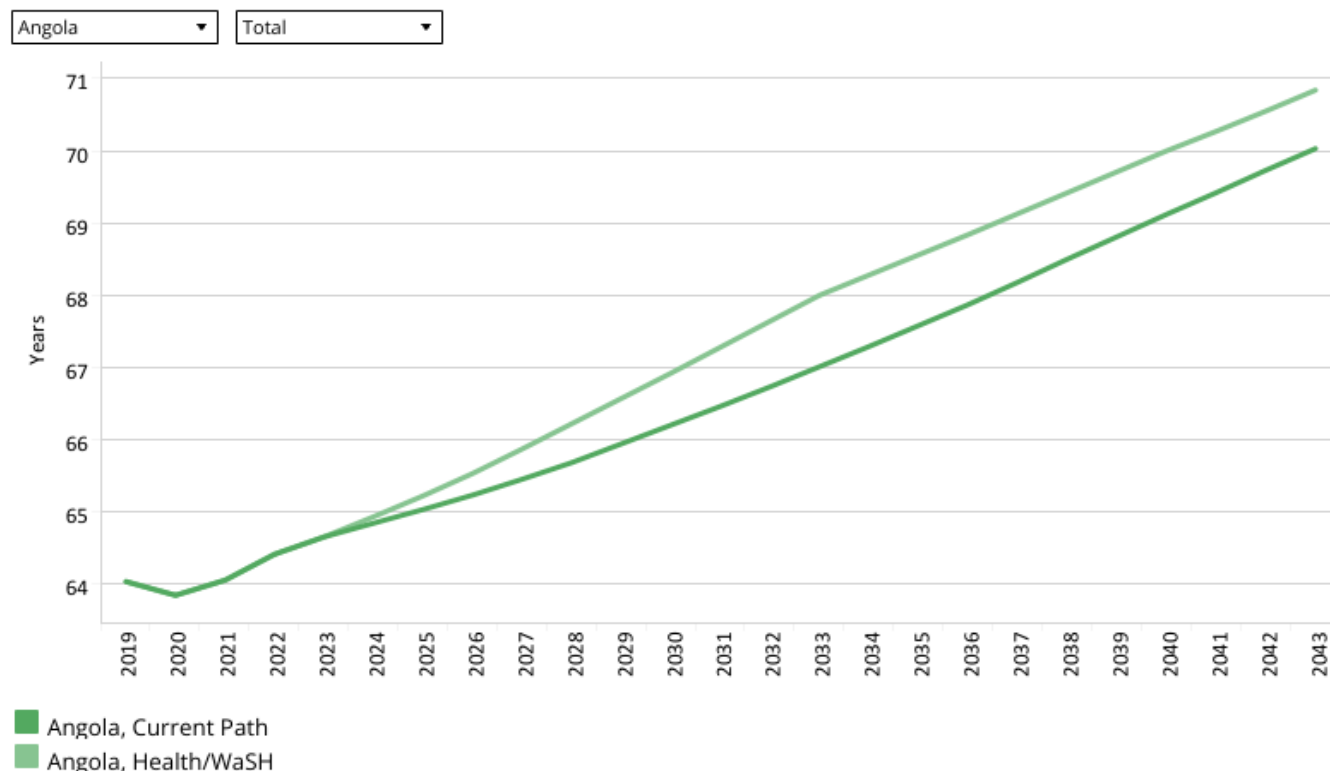⁘ View on Tableau Public   ↺ ↻ ↺ ↻ ▼ | ⊡▼ ▣ ⸰⸰ Share

On the Current Path, the poverty rate will fall from the 2019 estimate of 60% to 55% by 2030 and 45% by 2043. Meanwhile, the number of Angolans living on less than US$3.20 per day will continue to grow for the coming decades owing to rapid population growth, reaching 30 million people by 2043.

The improved child and maternal health outcomes modelled in the Demographic scenario only modestly improve Angola's poverty outlook. In the Demographic scenario, the number of Angolans living on less than US$3.20 per day still continues to grow through our forecast horizon of 2043. It also shows that the poverty rate falls only slightly more quickly in the Demographic scenario than in the Current Path forecast. The modest effect of the Demographic scenario on Angolan poverty speaks not only to the pervasiveness of poverty — especially rural poverty — in the country, but also to the need for coordinated efforts that include education, health, and infrastructure initiatives to address it.

Health/WaSH scenario

Chart 20: Life expectancy in CP and Health/WaSH scenario, 2019–2043

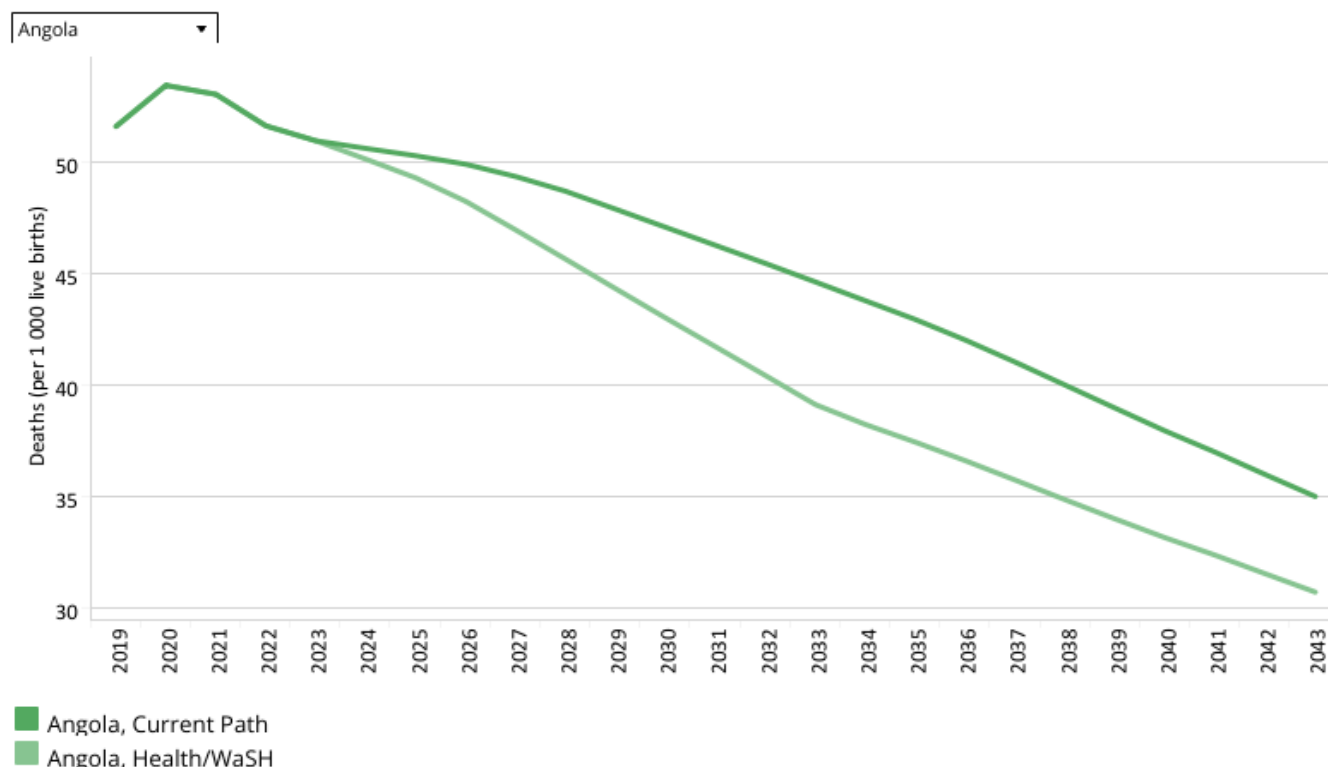Source: IFs 7.63 initialising from Institute for Health Metrics Evaluation GBD Foresight Tool data

This section presents reasonable but ambitious improvements in the Health/WaSH scenario, which include reductions in the mortality rate associated with both communicable diseases (e.g. AIDS, diarrhoea, malaria and respiratory infections) and non-communicable diseases (NCDs) (e.g. diabetes), as well as improvements in access to safe water and better sanitation. The acronym WaSH stands for water, sanitation and hygiene.

The intervention is explained here in the thematic part of the website.

Life expectancy in Angola has improved dramatically from just 39 years in 1975 to 64 years in 2019 and is expected to improve to 70 years by 2043. However, despite these improvements, Angola lags behind the average for lower middle-income African countries in this key measure of quality of life. In 2019, the average person in lower middle-income Africa lived to be just over 67 years old.

The improved health outcomes and access to water and sanitation modelled in the Health/WaSH scenario only slightly improve life expectancy in Angola as compared to the Current Path forecast, and only over the long term. Even in the Health/WaSH scenario, Angolans do not live as long as the average individual in lower middle-income Africa, underscoring the need for more than just health and sanitation improvements in the country.

Chart 21: Infant mortality in CP and Health/WaSH scenario, 2019–2043
Deaths per 1 000 live births

Angola, Current Path
Angola, Health/WaSH

Source: IFs 7.63 initialising from Institute for Health Metrics and Evaluation Mortality Visualization Tool data

⊹ View on Tableau Public   ↺ ↻ ↶ ↷ ▾ | 🖵▾ ⬚ ⤳ Share

In 2019, an estimated 52 infants out of every 1 000 live births did not survive beyond their first year. This rate is higher than the average for lower middle-income Africa and extremely high compared to developed countries (for example, the U.S. had an infant mortality rate of 5.6 in 2019). In the Current Path forecast, the infant mortality rate will fall to 38 deaths per 1 000 live births by 2035 and approximately 35 by 2043. At that point, the infant mortality rate in Angola should be similar to the average rate for lower middle-income countries in Africa.

In the Health/WaSH scenario, Angola's infant mortality rate falls more rapidly to 43 deaths per 1 000 live births in 2030 and 30.8 deaths by 2043. Although this forecast marks an improvement over the Current Path, it suggests that Angola will still be far from reaching the Sustainable Development Goal to reduce the under-five mortality rate to at least 25 deaths per 1 000 live births by 2030.
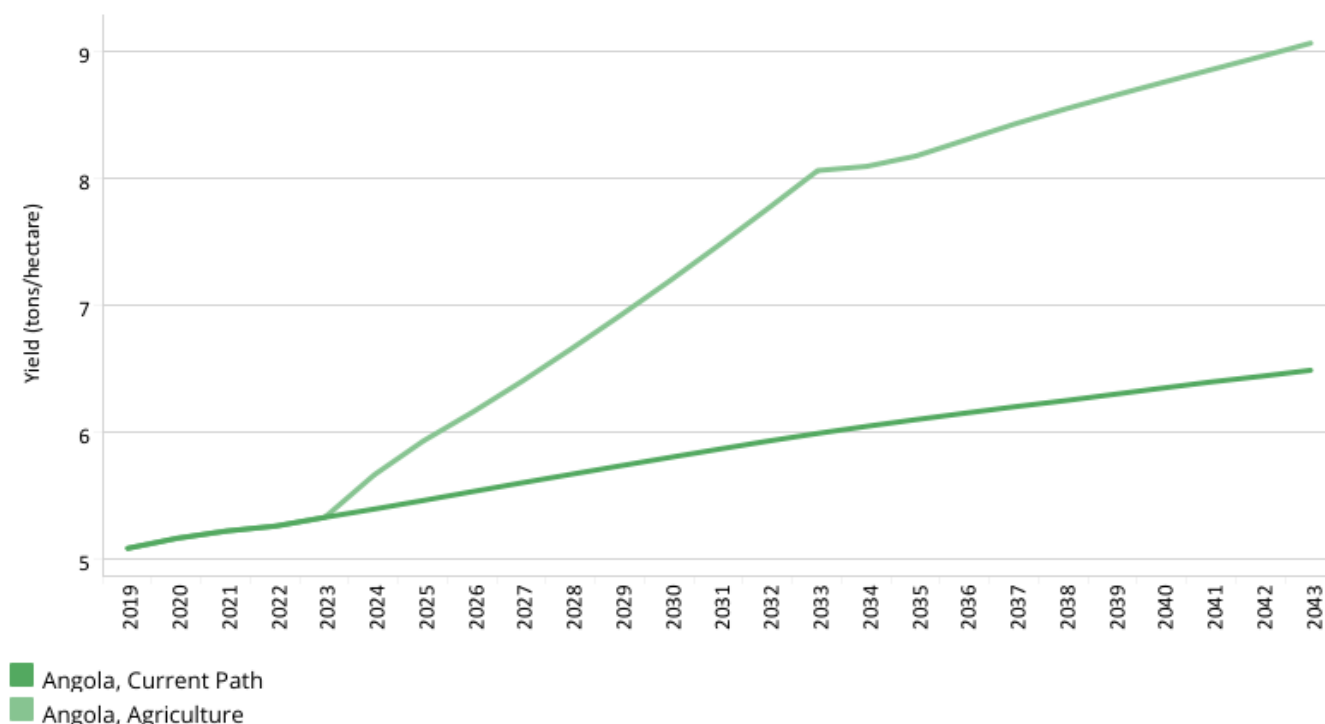
Agriculture scenario

Chart 22: Yield/hectare in CP and Agric scenario, 2019–2043
Pre-loss levels

Angola ▼

- Angola, Current Path
- Angola, Agriculture

Source: IFs 7.63 initialising from FAOSTAT on-line statistical service data

View on Tableau Public   Share

The Agriculture scenario represents reasonable but ambitious increases in yields per hectare (reflecting better management and seed and fertiliser technology), increased land under irrigation and reduced loss and waste. Where appropriate, it includes an increase in calorie consumption, reflecting the prioritisation of food self-sufficiency above food exports as a desirable policy objective.

The intervention is explained here in the thematic part of the website.

The data on yield per hectare (in metric tons) is for crops but does not distinguish between different categories of crops.
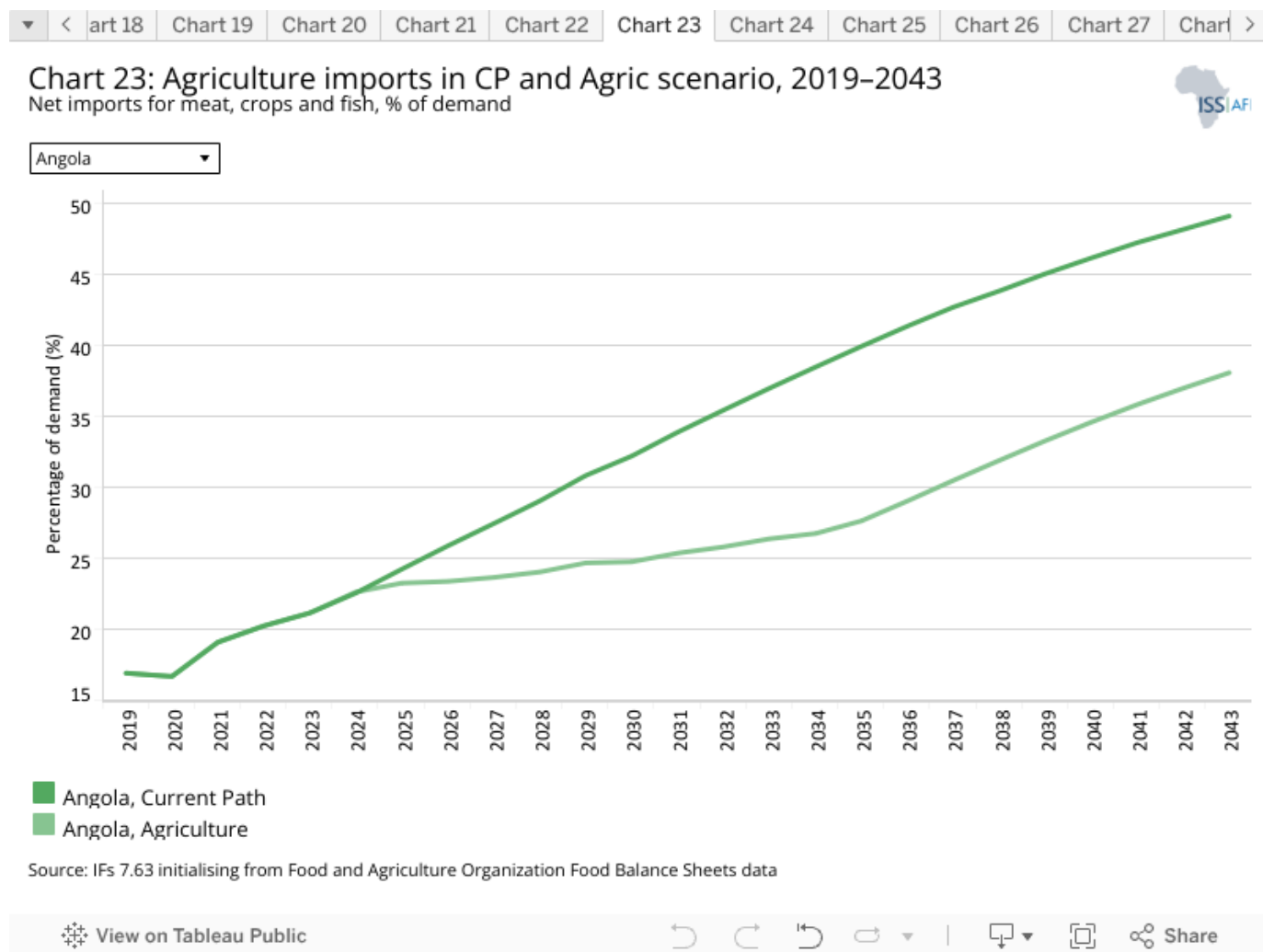
Angola's agricultural sector performs far below its potential, which its low agricultural yields reflect. Only 2% of Angola's cropland is equipped for irrigation (88 793 hectares), while 0.2% is actually irrigated (11 600 hectares). In recent years, agriculture's share of Angola's economy has grown rapidly, however, averaging 4.9% a year during the 2011-2017 period.

On the Current Path, yields will increase only modestly from the 2019 estimate of 5 tons per hectare to 6.5 tons by 2043. In the Agriculture scenario, they increase more rapidly to 7.2 tons per hectare by 2030 and about 9 tons by 2043, marking a significant improvement over the Current Path forecast.

Developing Angola's agricultural sector faces a number of barriers, key among them being the lack of land tenure security

among subsistence farmers, fertilizer costs, the enduring threat of landmines, climate change and deforestation. According to the World Bank's Angola Country Climate and Development Report (CCDR), yields of major crops will be negatively impacted through, amongst others, shorter and more concentrated rainy seasons, higher temperatures, increased droughts, and water scarcity. Without security of tenure, small-scale farmers cannot access credit to invest in better seeds, implements and facilities that could improve yields. The country needs to redouble its efforts to transition from subsistence farming go climate-resilient farming.

In June 2022, the government announced the start of construction of a US$2 billion industrial complex to produce fertilizer in the Zaire province, to be completed in 2026. Production will meet local demand as well as for export purposes.

Chart 23: Agriculture imports in CP and Agric scenario, 2019–2043
Net imports for meat, crops and fish, % of demand

Source: IFs 7.63 initialising from Food and Agriculture Organization Food Balance Sheets data

Agricultural import dependence is a key element of food insecurity; countries highly dependent on agricultural imports, especially of foods that can be grown domestically, are vulnerable to international commodity price shocks.

In 2019, Angola depended on agricultural imports to meet an estimated 17% of domestic demand. Meanwhile, lower middle-income Africa, on average, depends less on agricultural imports than Angola — a dynamic projected to continue over the forecast horizon. In the Current Path forecast, Angola's agricultural import dependence will increase rapidly over the coming decades: by 2043, the nation is projected to depend on agricultural imports to meet half of its domestic food demand.

In the Agriculture scenario, the import dependence outlook is brighter, but still concerning from a food security

perspective. The improved agricultural production modelled in this scenario helps to stabilise the country's dependence on agricultural imports over the medium term. However, Angola's population is among the youngest and fastest growing in the world, and greater investments in the agricultural sector will be necessary to keep its dependence on food imports from deepening over the long term.

Chart 24: GDP per capita in the CP and Agric scenario, 2019–2043
Purchasing power parity

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Angola ▼

■ Angola, Current Path
■ Angola, Agriculture

Source: IFs 7.63 initialising from UN Population Division World Population Prospects and World Development Indicators data

⁜ View on Tableau Public   ↶ ↷ ↺ ↻ ▼ | ⬇▼ ▣ ⌁ Share

On the Current Path, Angola's average incomes will outpace those of other lower middle-income countries in Africa and reach US$7 060 by 2030 and US$9 205 by 2043. The improved agricultural productivity modelled in the Agriculture scenario helps to improve average incomes slightly more rapidly, but only slightly: by 2043, GDP per capita is projected to reach US$9 494 in the Agriculture scenario — only US$289 greater than the Current Path forecast. More coordinated efforts that span sectors — governance, agriculture, education, health, infrastructure — are needed to improve Angola's average incomes more rapidly.

Chart 25: Poverty in CP and Agric scenario, 2019–2043
Millions of people and % of total population
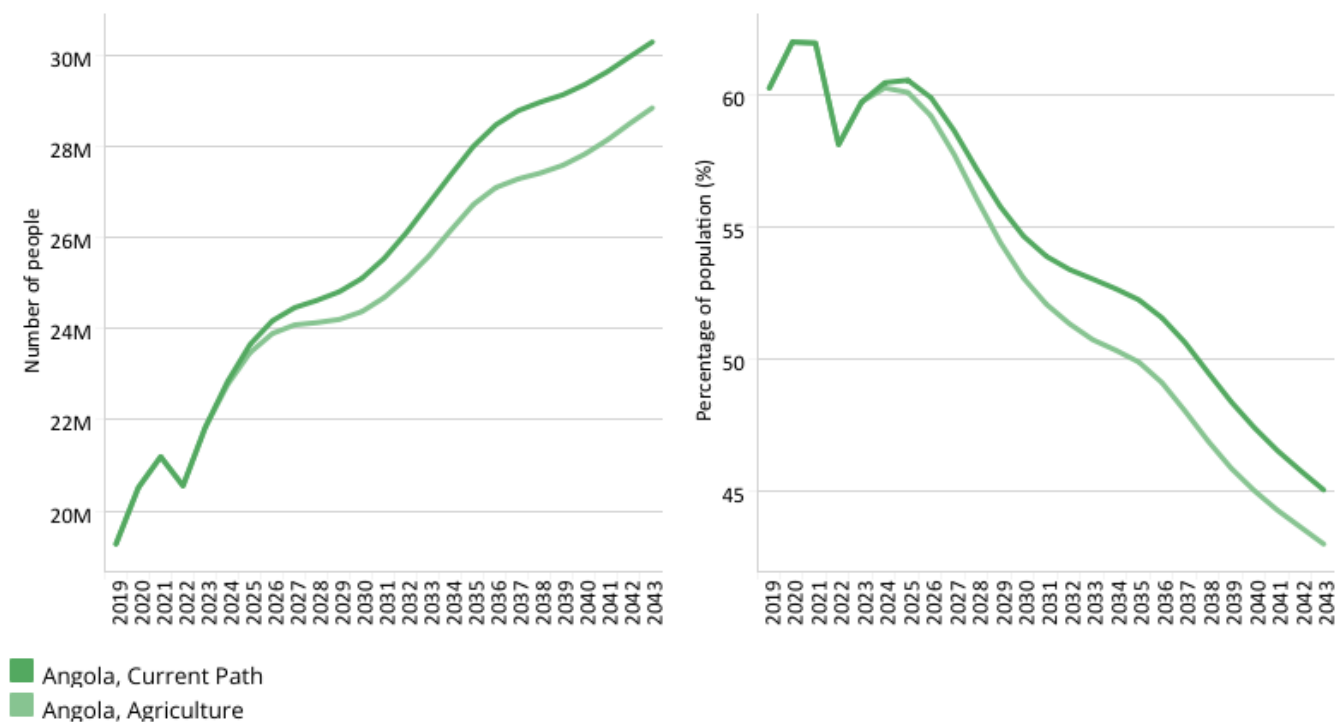
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[Angola ▼] [$3.20 ▼]

■ Angola, Current Path
■ Angola, Agriculture

Source: IFs 7.63 initialising from UN Population Division Population Prospects estimate, World Development Indicators population data and PovcalNet World Bank data

⊹ View on Tableau Public   ↶ ↷ ↺ ↪ ▼ | ⬇▼ ▢ ∝ Share

On the Current Path, the poverty rate will fall from the 2019 estimate of 60% to 55% by 2030 and 45% by 2043. Meanwhile, the number of Angolans living on less than US$3.20 per day will continue to grow for the coming decades owing to rapid population growth, reaching 30 million people by 2043.

The improved agricultural productivity modelled in the Agriculture scenario helps to slightly reduce poverty in Angola over the long term but does not make a substantial difference. In the Agriculture scenario, the extreme poverty rate falls more rapidly to 53% in 2030 and 43% by 2043. However, the Angolan population is among the youngest and fast growing in the world. Because of this, the number of extremely poor Angolans continues to grow through 2043 in the Agriculture scenario, reaching nearly 29 million people by that year.
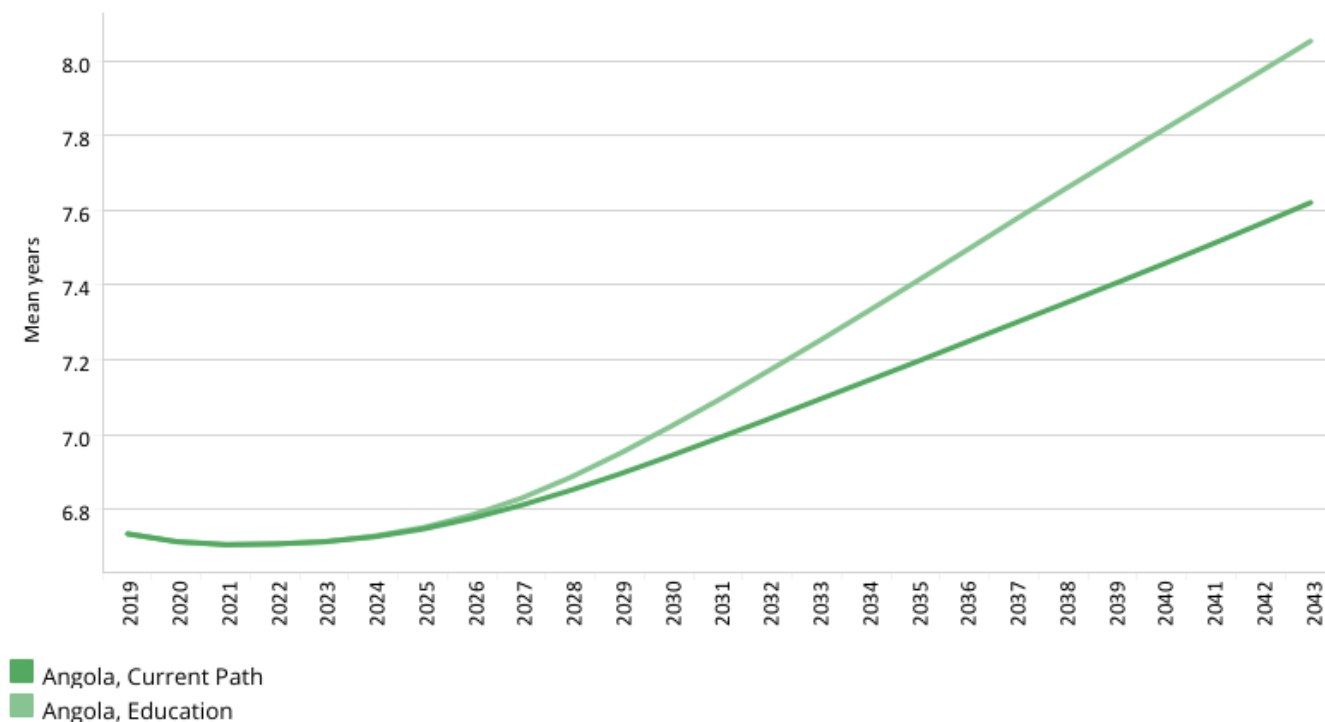
Education scenario

Chart 26: Mean years of education in CP and Educ scenario, 2019–2043
Mean years of adult (+15) education

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Angola ▼   Total ▼

■ Angola, Current Path
■ Angola, Education

Source: IFs 7.63 initialising from Barro-Lee data
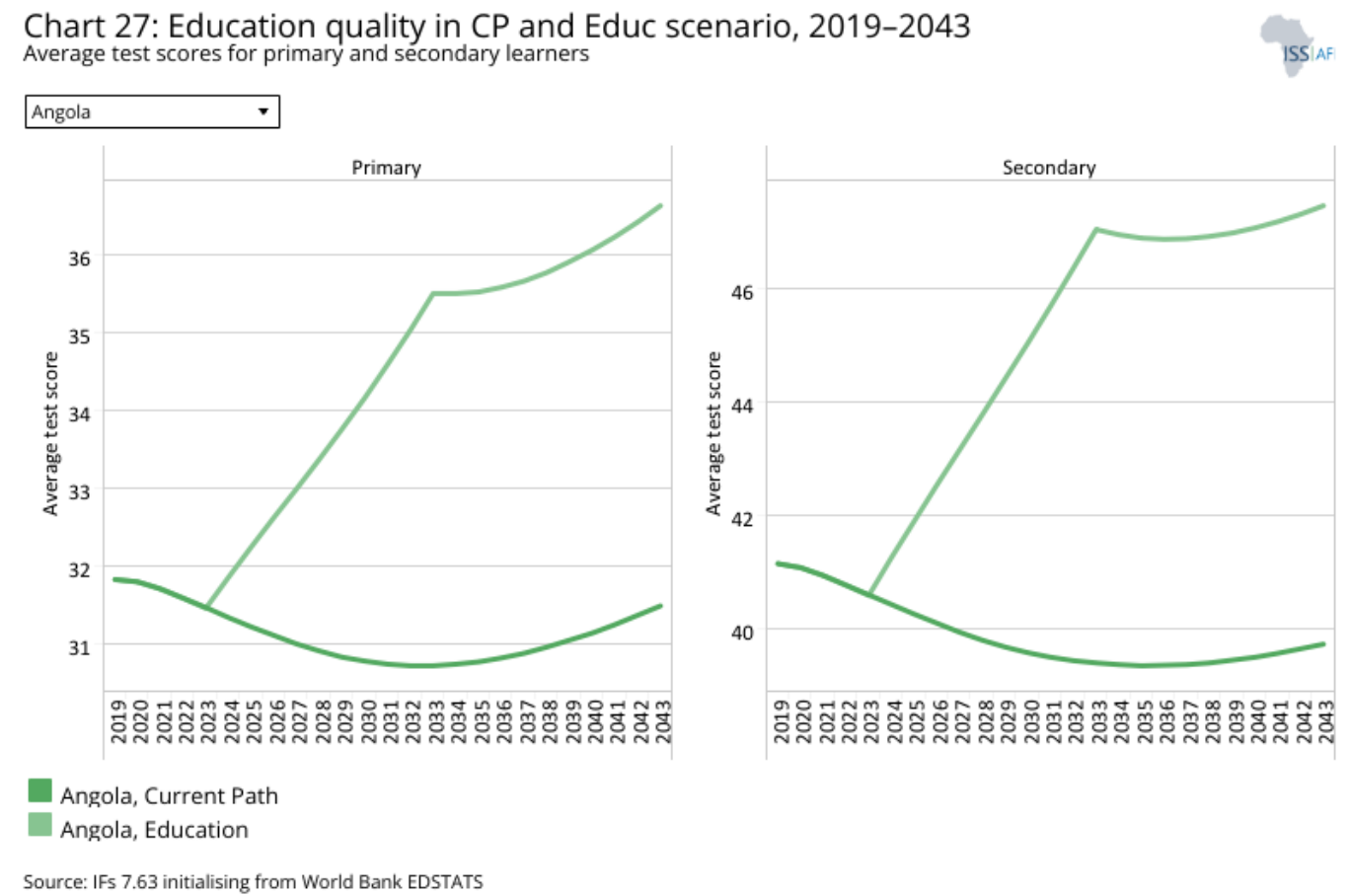
⁜ View on Tableau Public   ↶ ↷ ↺ ↻ ▼ | ⬓▼ ⬒ ⋈ Share

The Education scenario represents reasonable but ambitious improved intake, transition and graduation rates from primary to tertiary levels and better quality of education. It also models substantive progress towards gender parity at all levels, additional vocational training at secondary school level and increases in the share of science and engineering graduates.

The intervention is explained here in the thematic part of the website.

In 2019 it is estimated that the average Angolan adult (+15 years of age) had achieved 6.7 years of education. In 2014 (the latest year of available data), the average adult above the age of 25 in Angola had completed four years of schooling. Nationally, nearly one-third of Angolan adults had not received any education, and in that category, 70% were women. A quarter of Angola's population 25 years and older had received an incomplete primary education; 15% had completed primary; 13% had completed lower secondary, while another 13% had also completed upper secondary; and, lastly, only 2.6% had attained a bachelor's degree or equivalent.

These concerning low levels of educational attainment reflect the challenges faced by Angola's education system, particularly at the primary level. A lack of well-trained teachers and limited infrastructure undermine the quality of education, a problem fuelled by underspending on education.

In the Current Path forecast, the average Angolan adult in 2030 will have 6.9 years of education; in 2043, 7.6 years. Meanwhile, in the Education scenario, educational attainment is slightly higher: by 2043, the average Angolan adult will have achieved 8.1 years of education. Even in the Education scenario, Angola lags slightly behind the average for lower middle-income African countries.

Chart 27: Education quality in CP and Educ scenario, 2019–2043
Average test scores for primary and secondary learners

Angola, Current Path
Angola, Education

Source: IFs 7.63 initialising from World Bank EDSTATS

⊹ View on Tableau Public ↺ ↻ ↶ ↷ ▾ | ⬇▾ ⬜ ⚹ Share

Average test scores are a good indicator of the quality of an educational system. In Angola, both primary and secondary test scores are lower than the average for lower middle-income African countries, speaking to the challenges facing Angola's education system, which include poor infrastructure and underspending on education. These test scores are not projected to improve in the Current Path forecast.

Conversely, in the Education scenario, average test scores for both primary and secondary learners improve by nearly 90% for both primary and secondary learners by 2043 and eventually surpass the average for lower middle-income Africa.

Chart 28: GDP per capita in CP and Educ scenario, 2019–2043
Purchasing power parity
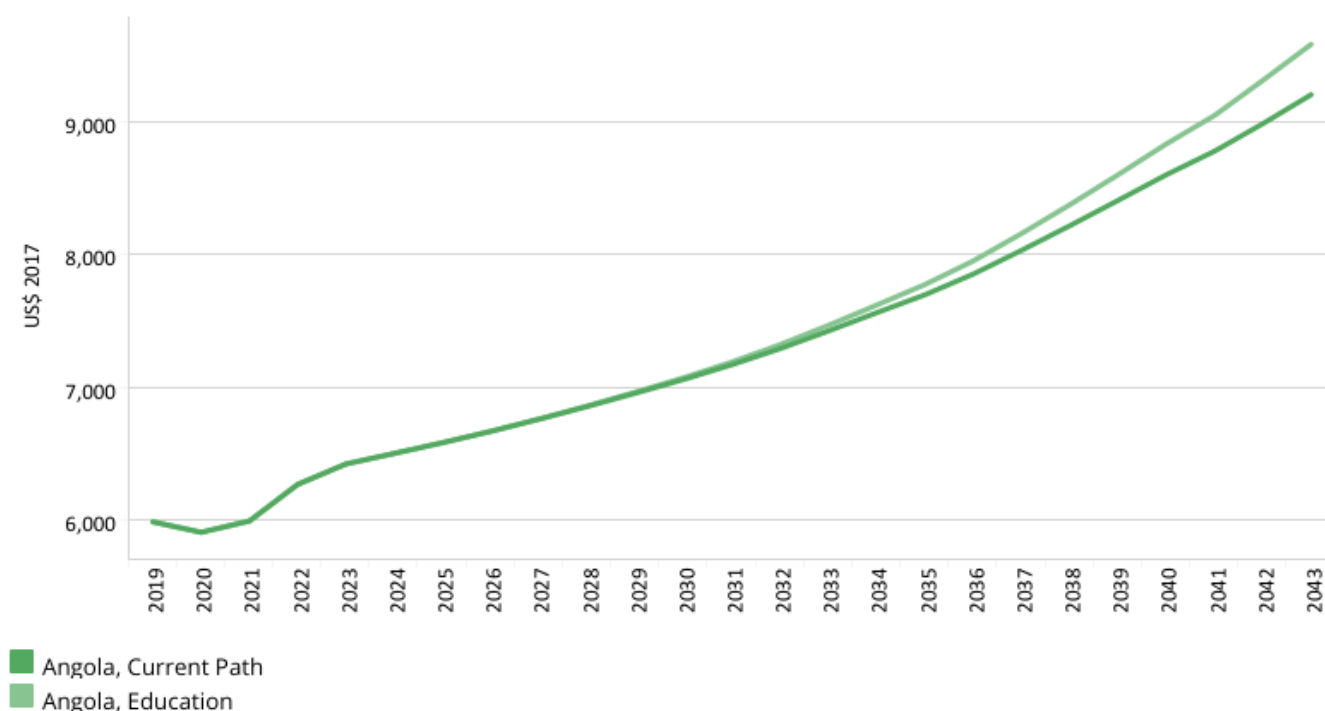
Angola ▼

Angola, Current Path
Angola, Education

Source: IFs 7.63 initialising from UN Population Division World Population Prospects and World Development Indicators data
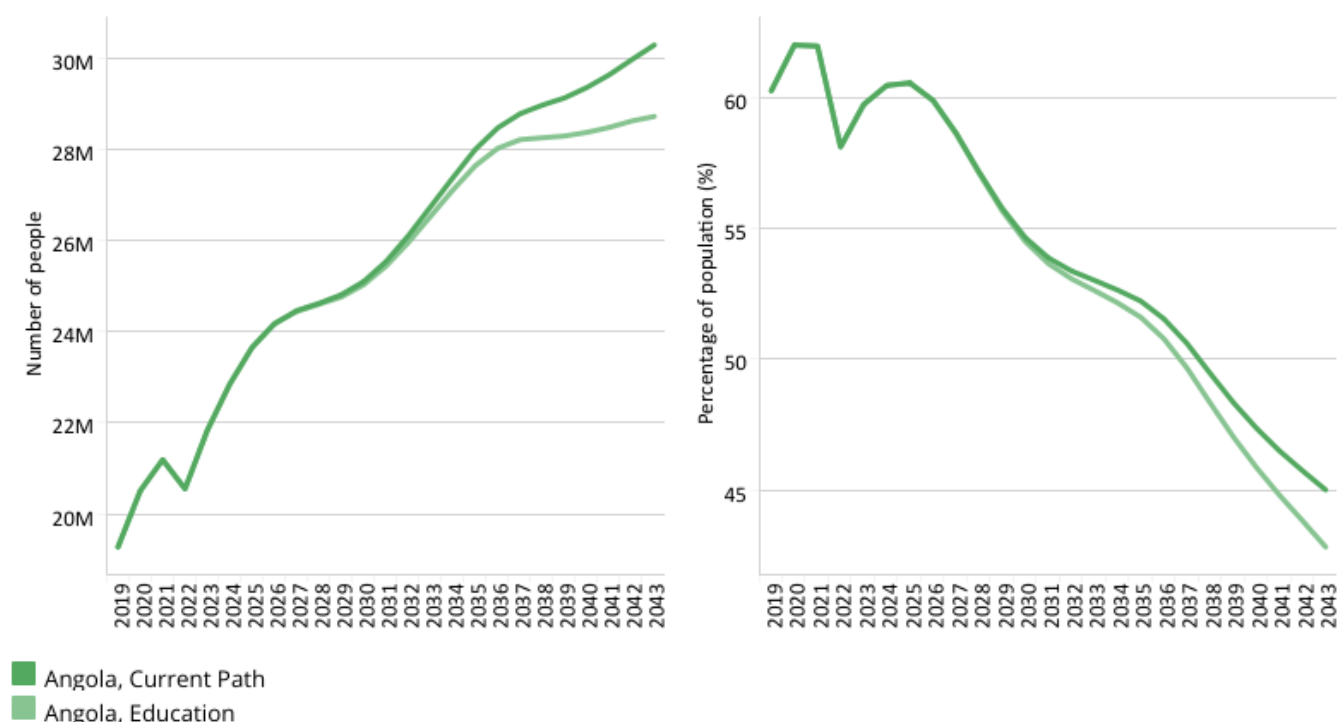
⊹ View on Tableau Public   ↺ ↻ ↶ ↷ ▾ | 🖫▾ ⛶ ⛗ Share

On the Current Path, Angola's average incomes will outpace those of other lower middle-income countries in Africa and reach US$7 060 by 2030 and US$9 205 by 2043. The Education scenario helps to improve average incomes in Angola, but only over the long term. By 2043, average incomes reach US$9 584 in the Education scenario, marking an increase of US$379 over the Current Path forecast.

Chart 29: Poverty in CP and Educ scenario, 2019–2043
Millions of people and % of total population

ISS|AF

Angola ▼ $3.20 ▼

■ Angola, Current Path
■ Angola, Education

Source: IFs 7.63 initialising from UN Population Division Population Prospects estimate, World Development Indicators population data and PovcalNet World Bank data

⊹ View on Tableau Public   ↺ ↻ ↶ ↷ ▼ | ⛶ ▼ ⛶ ⥮ Share

On the Current Path, the poverty rate will fall from the 2019 estimate of 60% to 55% by 2030 and 45% by 2043. Meanwhile, the number of Angolans living on less than US$3.20 per day will continue to grow for the coming decades owing to rapid population growth, reaching 30 million people by 2043.

One of the key drivers of poverty in Angola is deprivation of education. However, improving education alone will not substantially alleviate Angola's widespread and pervasive poverty. In the Education scenario, the number of Angolans continues to grow over the forecast horizon, reaching 28.7 million people by 2043 — only about 1.6 million fewer people than is forecast on the Current Path and approximately 9 million more people than in 2019.

Manufacturing scenario

Chart 30: Value added by sector in CP and Manufac/Transfers scenario, 2019–2043
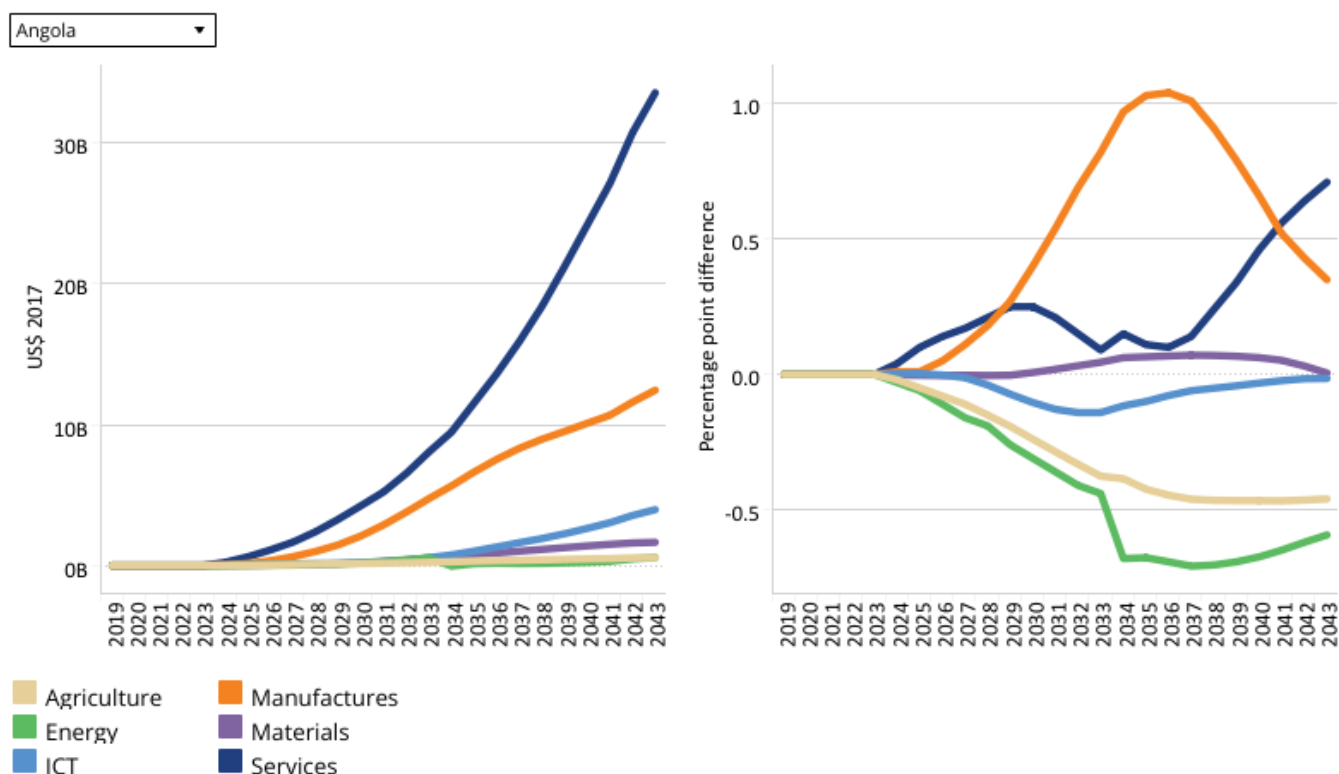
Source: IFs 7.63 initialising from International Monetary Fund World Economic Outlook database

The Manufacturing/Transfers scenario represents reasonable but ambitious manufacturing growth through greater investment in the economy, investments in research and development, and promotion of the export of manufactured goods. It is accompanied by an increase in welfare transfers (social grants) to moderate the initial increases in inequality that are typically associated with a manufacturing transition. To this end, the scenario improves tax administration and increases government revenues.

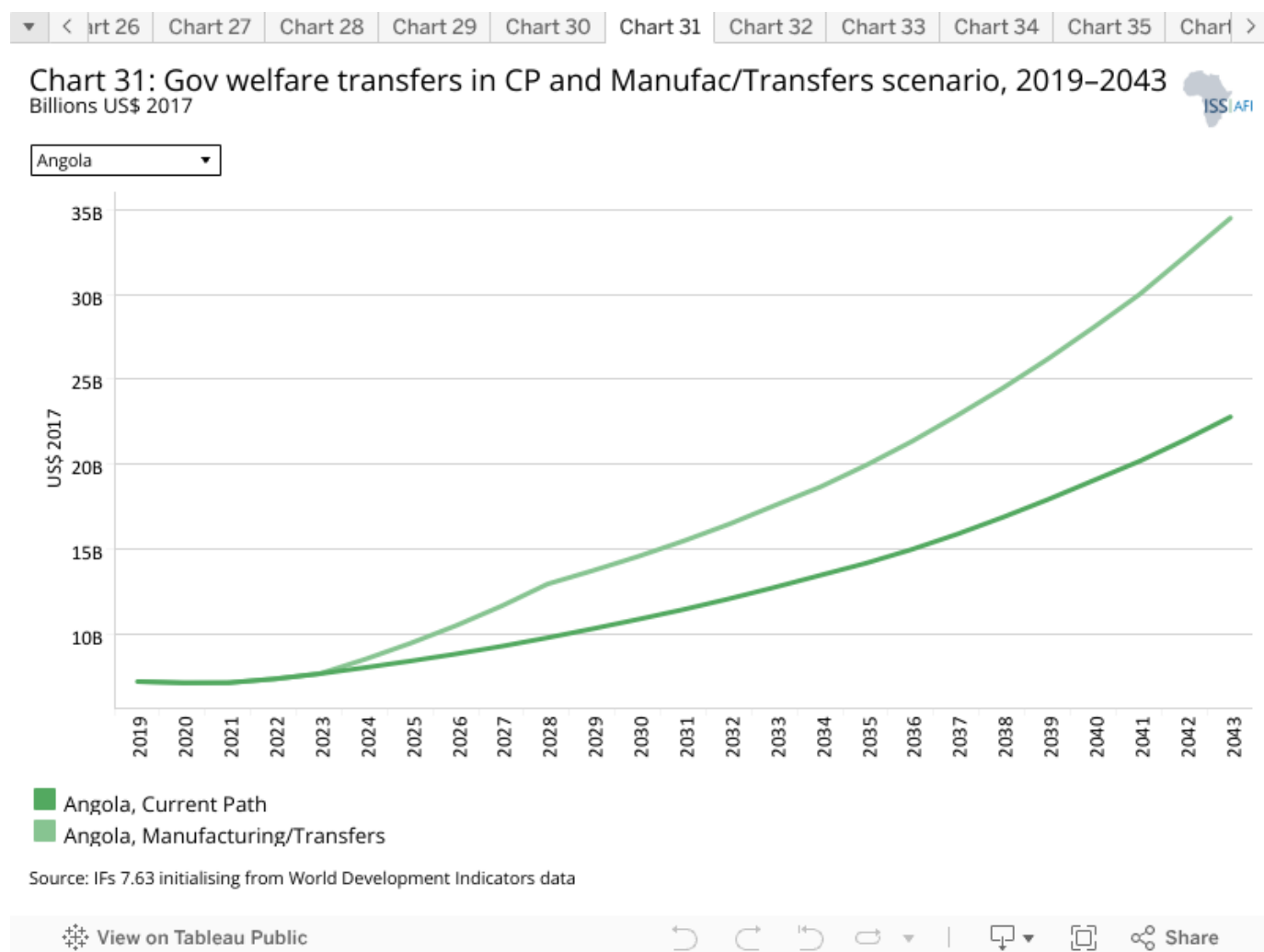The intervention is explained here in the thematic part of the website.

Chart 30 should be read with Chart 8 that presents a stacked area graph on the contribution to GDP and size, in billion US$, of the Current Path economy for each of the sectors.

Crude oil exports dominate the Angolan economy. Recognising that hydrocarbons alone cannot sustain sufficient economic growth to improve the livelihoods of Angola's growing population, the Angolan government has embraced the need to enhance other sectors such as agriculture, manufacturing and tourism as drivers of future growth. Agriculture, which has historically contributed as much as 13% (1998) and as little as 5% (2008), comprised roughly 12.5% of GDP in 2019. The contribution of the services sector has ranged from 21% of GDP in 1999 to 49% in 2009 and has since remained in the 46%–51% band. Manufacturing contributed less than 15% in 2019.

In the Current Path forecast, the value-added contributions of the services sector, manufacturing sector, ICT and materials sectors are projected to continue growing in both relative and absolute terms.

Although the absolute contributions of agriculture and energy are also set to increase, their value added as a per cent of GDP will decline.

In the Manufacturing/Transfers scenario, manufactures' contribution to GDP grows the most relative to the Current Path forecast. However, in the long-term, the contribution of services to GDP also grows, experiencing the biggest leap from the late-2030s onward. However, services, followed by manufactures, experience the most significant growth in their absolute contribution to the Angolan economy.

Chart 31: Gov welfare transfers in CP and Manufac/Transfers scenario, 2019–2043
Billions US$ 2017

Angola, Current Path
Angola, Manufacturing/Transfers

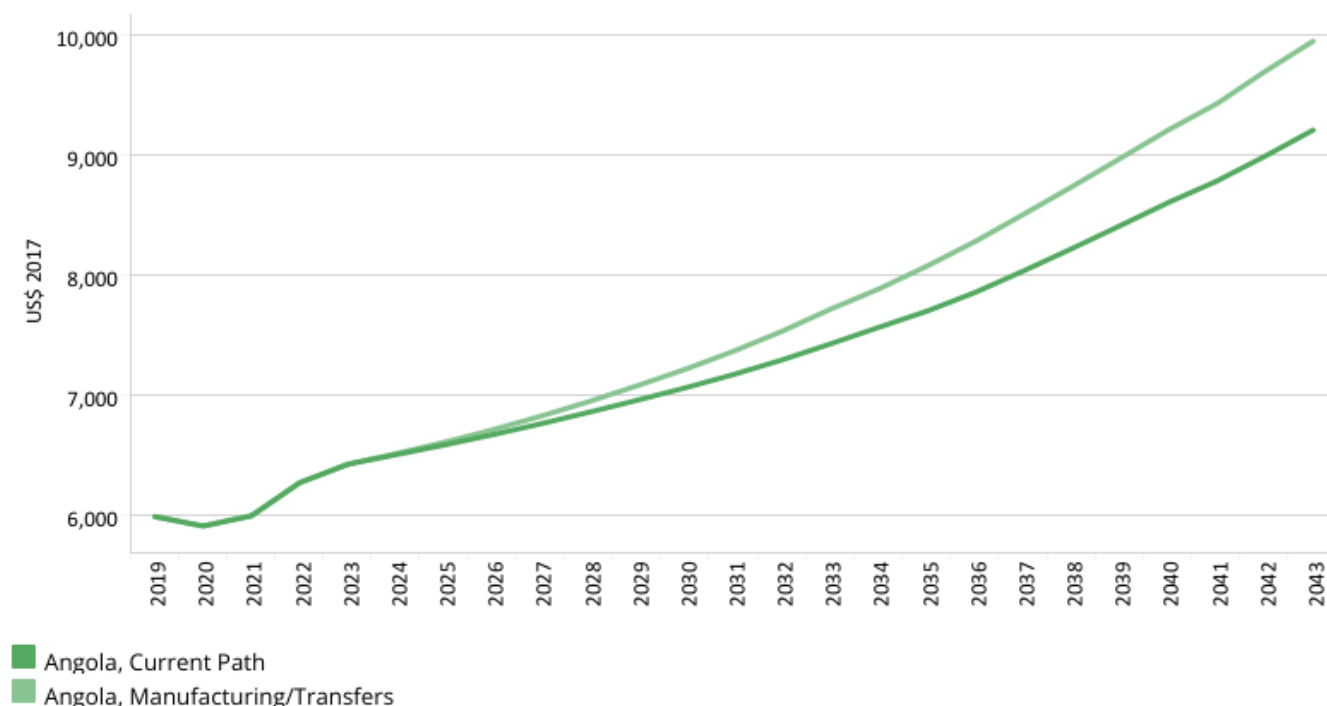Source: IFs 7.63 initialising from World Development Indicators data

There is a growing literature on the success of cash transfer programmes to combat poverty. In the Manufacturing/Transfers scenario, cash transfers from the Angolan government to vulnerable populations increase from 5.2% (US$7.18 billion) of GDP in 2019 to 6.7% (US$14.56 billion) in 2030 and 7.8% (US$34.5 billion) in 2043. Conversely, in the Current Path forecast, transfers do not exceed 6% of GDP over the forecast horizon.

Chart 32: GDP per capita in CP and Manufac/Transfers scenario, 2019–2043
Purchasing power parity

Angola ▼

■ Angola, Current Path
■ Angola, Manufacturing/Transfers

Source: IFs 7.63 initialising from UN Population Division World Population Prospects and World Development Indicators data
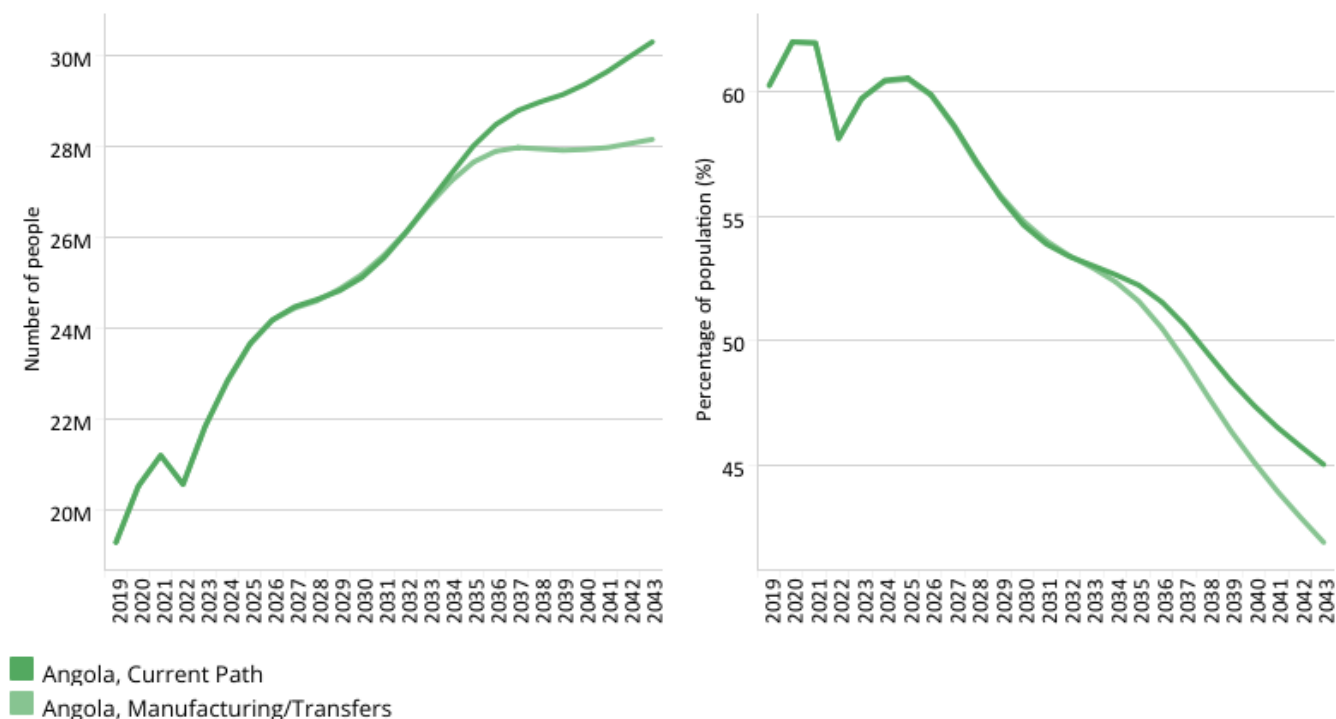
⁜ View on Tableau Public   ↺ ↻ ↺ ↻ ▾ | ⬇▾ ⬚ ⋘ Share

On the Current Path, Angola's average incomes will overtake those of other lower middle-income countries in Africa and reach US$7 060 by 2030 and US$9 205 by 2043.

In the Manufacturing/Transfers scenario, average incomes in Angola increase more rapidly than on the Current Path, reaching US$7 220 by 2030 and US$9 945 by 2043 — US$740 greater than the Current Path forecast. This growth in GDP per capita in the Manufacturing/Transfers scenarios evidences the positive impact of cash transfers to vulnerable populations — and of the growing Angola's manufacturing sector — on incomes over the long term.

Chart 33: Poverty in CP and Manufac/Transfers scenario, 2019–2043
Millions of people and % of total population

Angola ▼ $3.20 ▼

■ Angola, Current Path
■ Angola, Manufacturing/Transfers

Source: IFs 7.63 initialising from UN Population Division Population Prospects estimate, World Development Indicators population data and PovcalNet World Bank data

⊹ View on Tableau Public   ↶ ↷ ↺ ↻ ▼ | ⬇▼ ⛶ ⤳ Share

Poverty is among Angola's most pervasive challenges, especially in rural areas. In the Current Path forecast, the poverty rate will fall from the 2019 estimate of 60% to 55% by 2030 and 45% by 2043. Meanwhile, the number of Angolans living on less than US$3.20 per day will continue to grow for the coming decades owing to rapid population growth, reaching 30 million people by 2043.

While the poverty rate falls more quickly in the Manufacturing/Transfers scenario than on the Current Path, the number of poor Angolans still grows through the late-2030s before stabilising around 28 million people. Lifting more Angolans out of poverty in the short term will require more dramatic, concerted efforts from the government to address its ailing infrastructure, widespread corruption, and struggling educational and health systems.
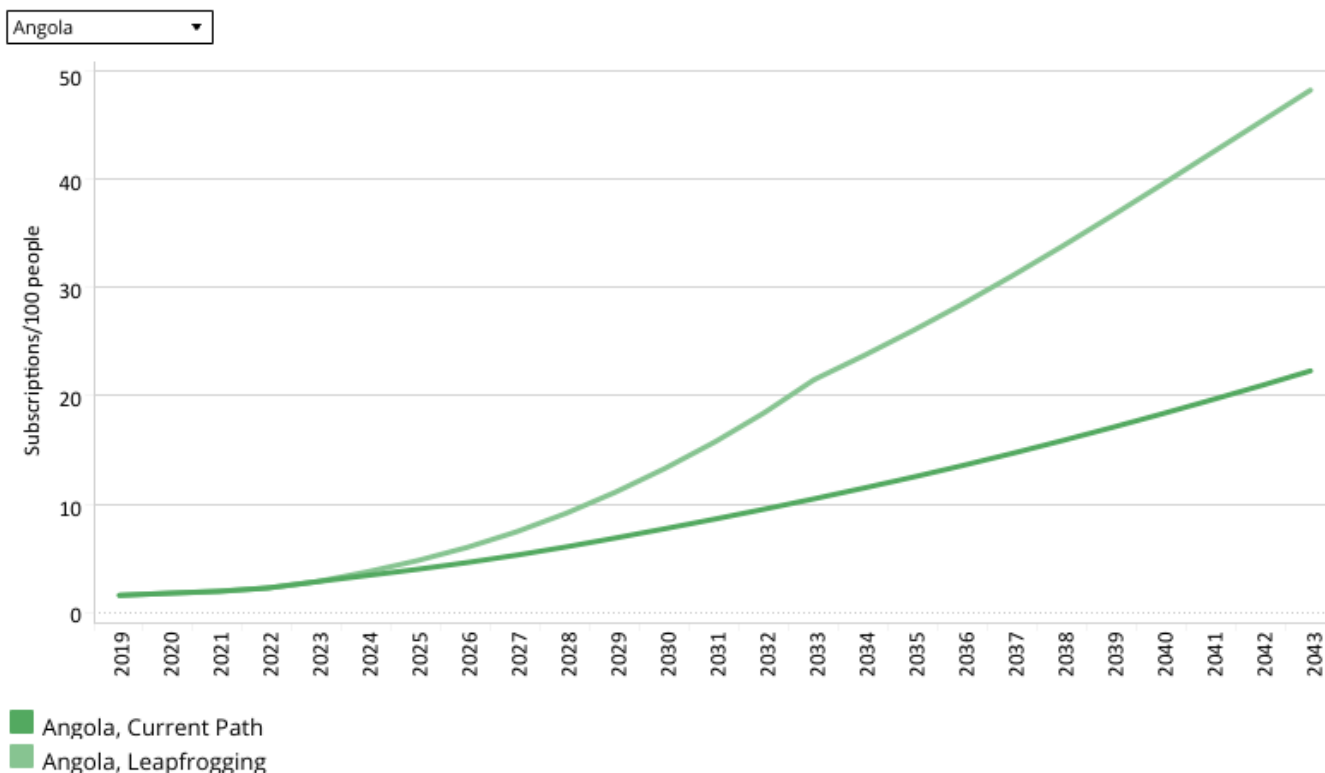
Chart 34: Fixed broadband access in CP and Leapfrogging scenario, 2019–2043
Subscriptions per 100 people

ISS|AFI

Angola ▼

■ Angola, Current Path
■ Angola, Leapfrogging

Source: IFs 7.63 initialising from International Telecommunication Union data
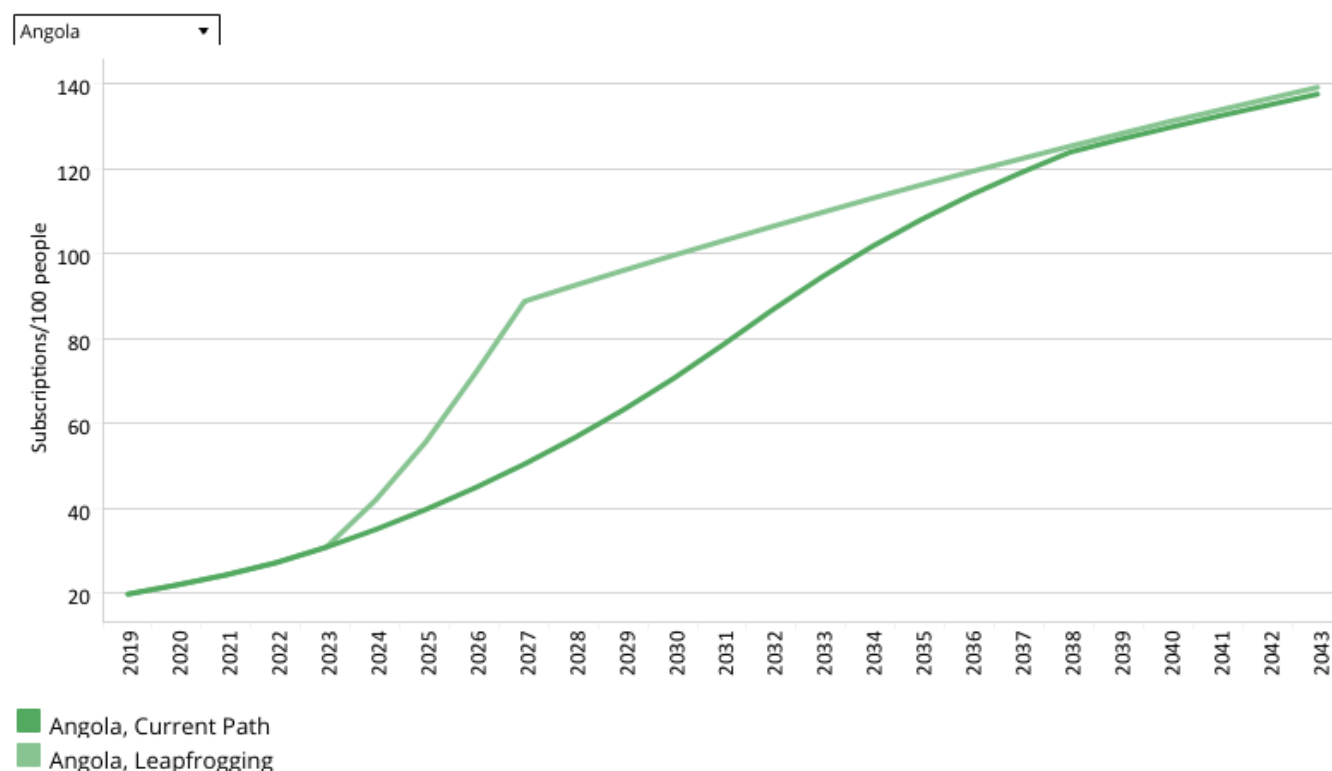
⁙ View on Tableau Public   ↺ ↻ ↶ ↷ ▼ | 🖵▼ 🔲 ⋘ Share

The Leapfrogging scenario represents a reasonable but ambitious adoption of and investment in renewable energy technologies, resulting in better access to electricity in urban and rural areas. The scenario includes accelerated access to mobile and fixed broadband and the adoption of modern technology that improves government efficiency and allows for the more rapid formalisation of the informal sector.

The intervention is explained here in the thematic part of the website.

Fixed broadband includes cable modem Internet connections, DSL Internet connections of at least 256 KB/s, fibre and other fixed broadband technology connections (such as satellite broadband Internet, ethernet local area networks, fixed-wireless access, wireless local area networks, WiMAX, etc.).

Broadband subscriptions, which are important for economic growth, regional integration, and human development more broadly, are very limited, with fewer than 2 fixed broadband subscriptions per every 100 Angolans in 2019, which is lower than the African average of 3 subscriptions for every 100 people. Subscriptions increase in the Current Path forecast, but only modestly, reaching 22 subscriptions for every 100 people by 2043. The Leapfrogging scenario features a much more rapid uptake of this technology, with 13 subscriptions for every 100 people in 2030 and 48 by 2043.

Chart 35: Mobile broadband access in CP and Leapfrogging scenario, 2019–2043
Subscriptions per 100 people

Angola, Current Path
Angola, Leapfrogging

Source: IFs 7.63 initialising from International Telecommunication Union data

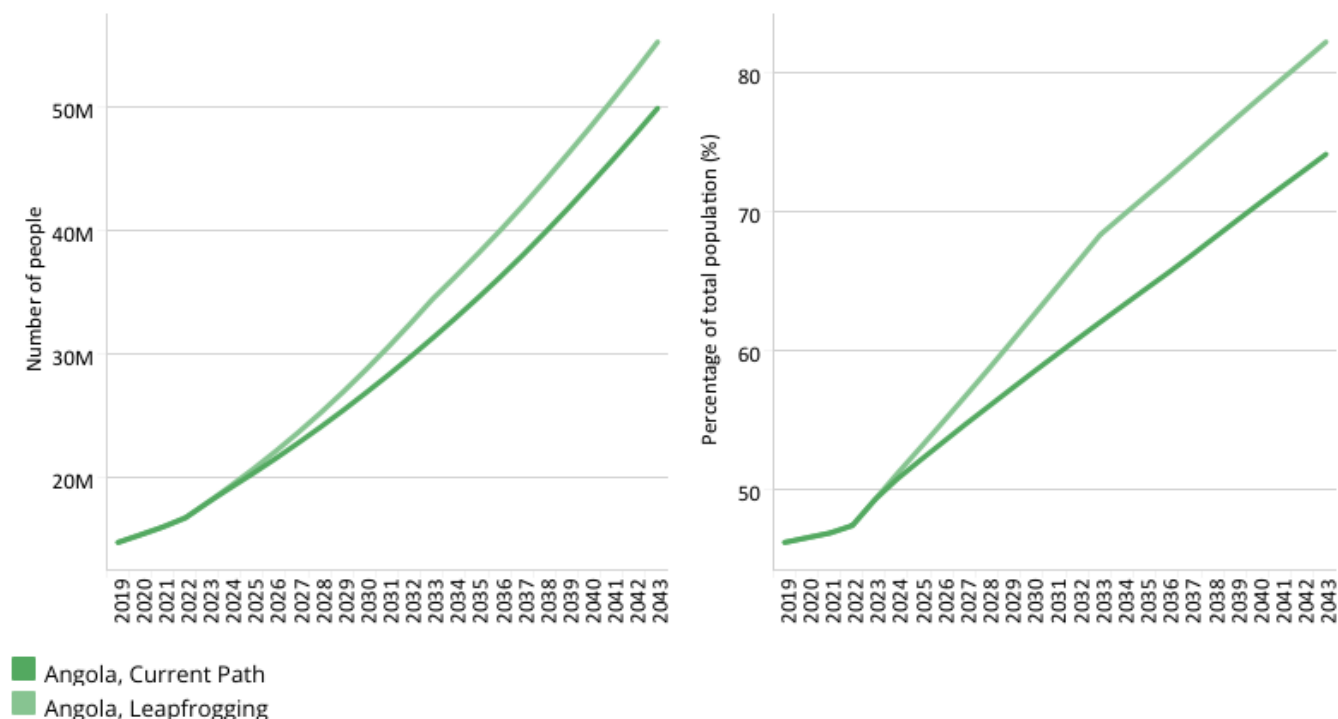View on Tableau Public   ↶ ↷ ↺ ↻ ▾ | ⬇▾ ⬜ ⤳ Share

Mobile broadband refers to wireless Internet access delivered through cellular towers to computers and other digital devices.

With an estimated 20 mobile broadband subscriptions per 100 people, mobile phone ownership in Angola is lower than the average for lower middle-income Africa. Mobile broadband subscriptions have the potential to improve the quality of life of vulnerable or marginalised populations who have little access to health, educational and economic resources. In the Current Path forecast, mobile phone ownership grows at a steady pace, reflecting the rapid uptake of technology in many developing countries. In the Leapfrogging scenario, mobile broadband subscriptions grow dramatically in the short term to 100 per 100 people by 2030 and 139 by 2043.

Chart 36: Electricity access in CP and Leapfrogging scenario, 2019–2043
Millions of people and % of population

ISS|AFI

Angola ▼   Total ▼

■ Angola, Current Path
■ Angola, Leapfrogging

Source: IFs 7.63 initialising from World Development Indicators data

↺ ↻ ↺ ⤷ ▼ | ⬇▼ ⬒ ⤳ Share   View on Tableau Public

At present, Angola's ailing basic infrastructure — including energy infrastructure — does not meet the needs of the country's growing and urbanising population.

In 2019, less than half of all Angolans had access to electricity. Many estimates contend that the access rate may actually be much lower. As little as 8% of the rural population has access to electricity, while roughly 43% of the urban population has access. Because the government struggles to generate and distribute uninterrupted electricity, residents and businesses rely heavily on petrol or diesel generators.

In the Leapfrogging scenario, the electricity access rate grows slightly more rapidly than in the Current Path forecast, reaching nearly 78% by 2043, compared to 74% on the Current Path. This translates into an additional three million Angolans having access to electricity in 2043.

Chart 37: GDP per capita in CP and Leapfrogging scenario, 2019–2043
Purchasing power parity
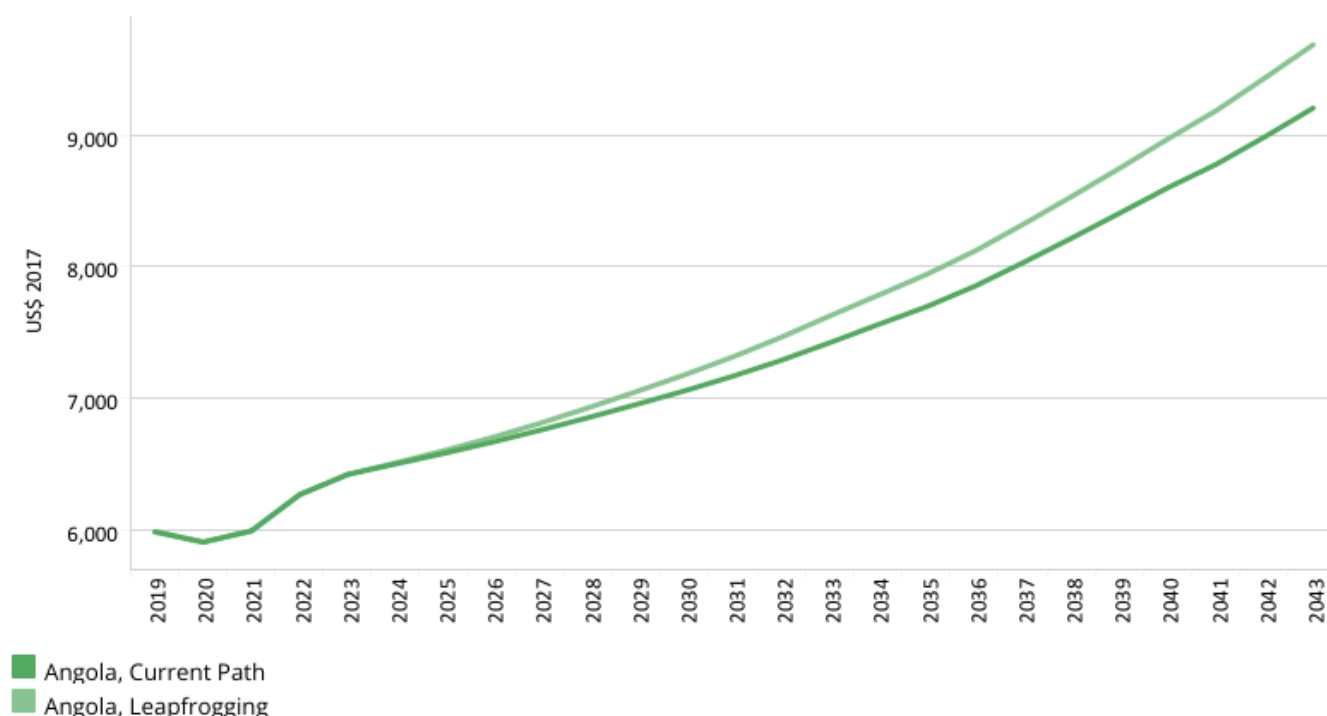
Source: IFs 7.63 initialising from UN Population Division World Population Prospects and World Development Indicators data

⸭ View on Tableau Public   ↺ ↻ ↺ ↷ ▾ | 🖵 ▾   ⛶   ⛛ Share

On the Current Path, Angola's average incomes will outpace those of other lower middle-income countries in Africa and reach US$7 060 by 2030 and US$9 205 by 2043.

Owing to the expanded access to electricity in both rural and urban areas modelled in the Leapfrogging scenario, average incomes grow more quickly than on the Current Path. In the Leapfrogging scenario, average incomes reach US$7 180 by 2030 and US$9 686 by 2043, which is US$481 greater than the Current Path forecast for that year. The greater electricity access of the Leapfrogging scenario has the potential to significantly improve livelihoods in Angola, primarily by granting more Angolans access to healthcare, education, and economic resources.

Chart 38: Poverty in CP and Leapfrogging scenario, 2019–2043
Millions of people and % of total population

ISS|AFI

| Angola ▼ | $3.20 ▼ |

■ Angola, Current Path
■ Angola, Leapfrogging
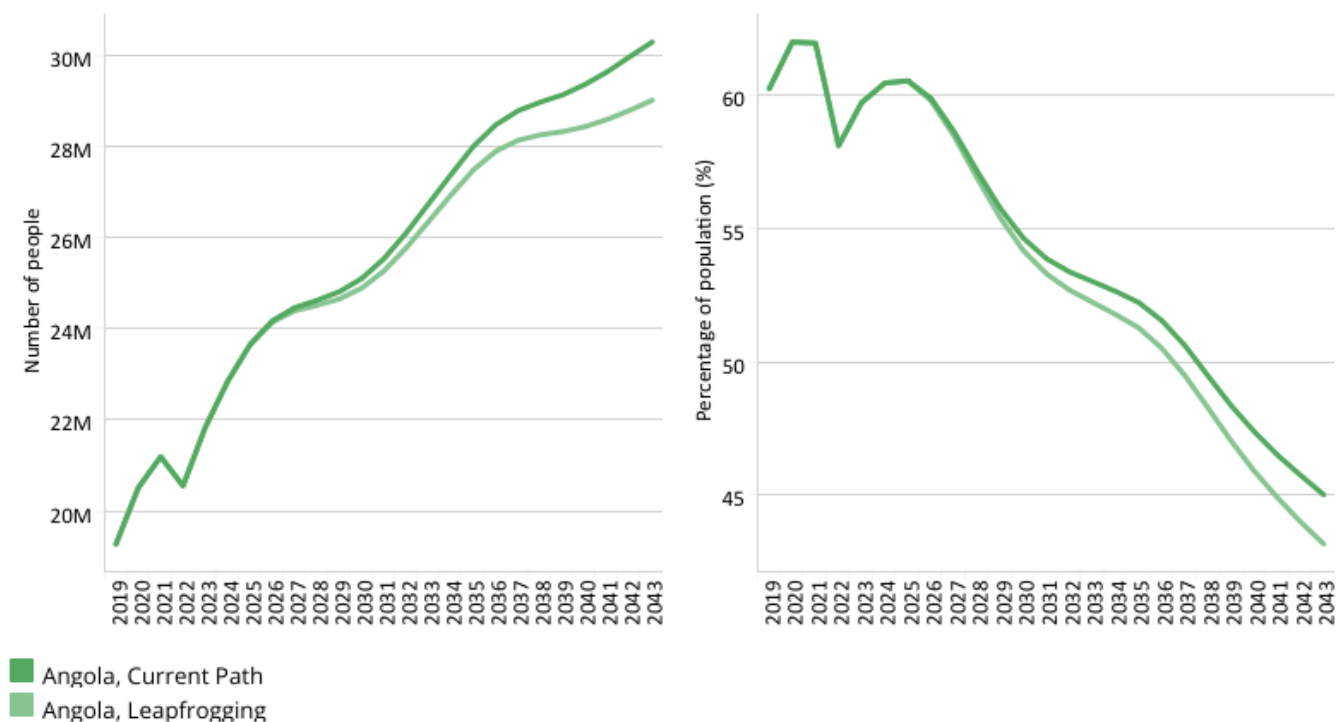
Source: IFs 7.63 initialising from UN Population Division Population Prospects estimate, World Development Indicators population data and PovcalNet World Bank data

⁜ View on Tableau Public   ↺ ↻ ⟲ ⟳ ▼ | 🖵▼ ⬜ ⚡ Share

In the Leapfrogging scenario, extreme poverty remains a growing problem for Angola over the forecast horizon, with the number of Angolans living on less than US$3.20 per day growing until the late-2030s before stabilising. However, this forecast offers a more optimistic picture than the Current Path forecast, on which the number of poor Angolans continues to grow through to 2043 and beyond.

That being said, approximately two out of five Angolans are projected to be living in extreme poverty in the Leapfrogging scenario by 2043 — a dramatic improvement over the 2019 poverty rate of roughly 60%, but gravely concerning, nonetheless. More than expanded electricity access will be needed to more dramatically reduce poverty in the country.

Free Trade scenario

Chart 39: Trade balance in CP and Free Trade scenario, 2019–2043
% of GDP
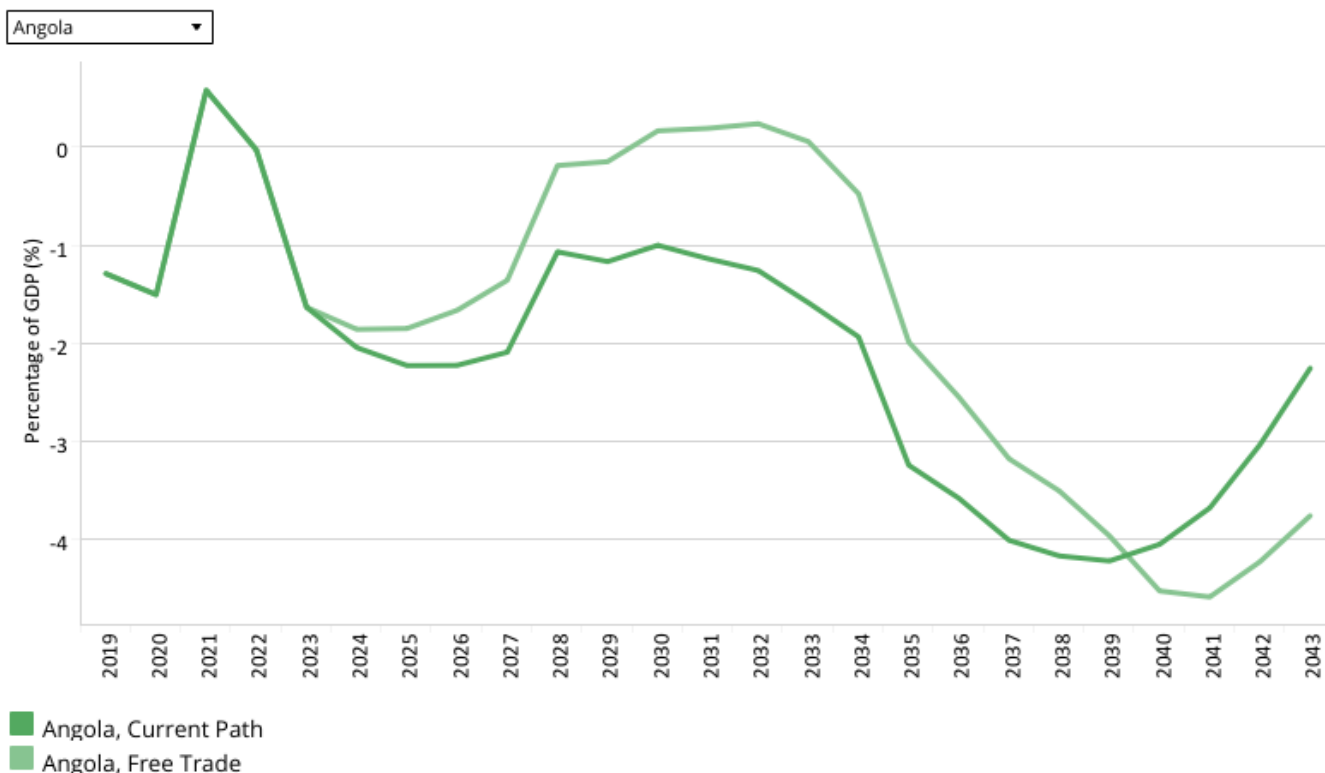
Angola ▼

■ Angola, Current Path
■ Angola, Free Trade

Source: IFs 7.63 initialising from World Development Indicators data

⁙ View on Tableau Public   ↺ ↻ ↶ ↷ ▼ | ⬇ ▼ ⬚ ⁂ Share

The Free Trade scenario represents the impact of the full implementation of the African Continental Free Trade Area (AfCFTA) by 2034 through increases in exports, improved productivity and increased trade and economic freedom.

The intervention is explained here in the thematic part of the website.

The trade balance is the difference between the value of a country's exports and its imports. A country that imports more goods and services than it exports in terms of value has a trade deficit, while a country that exports more goods and services than it imports has a trade surplus.
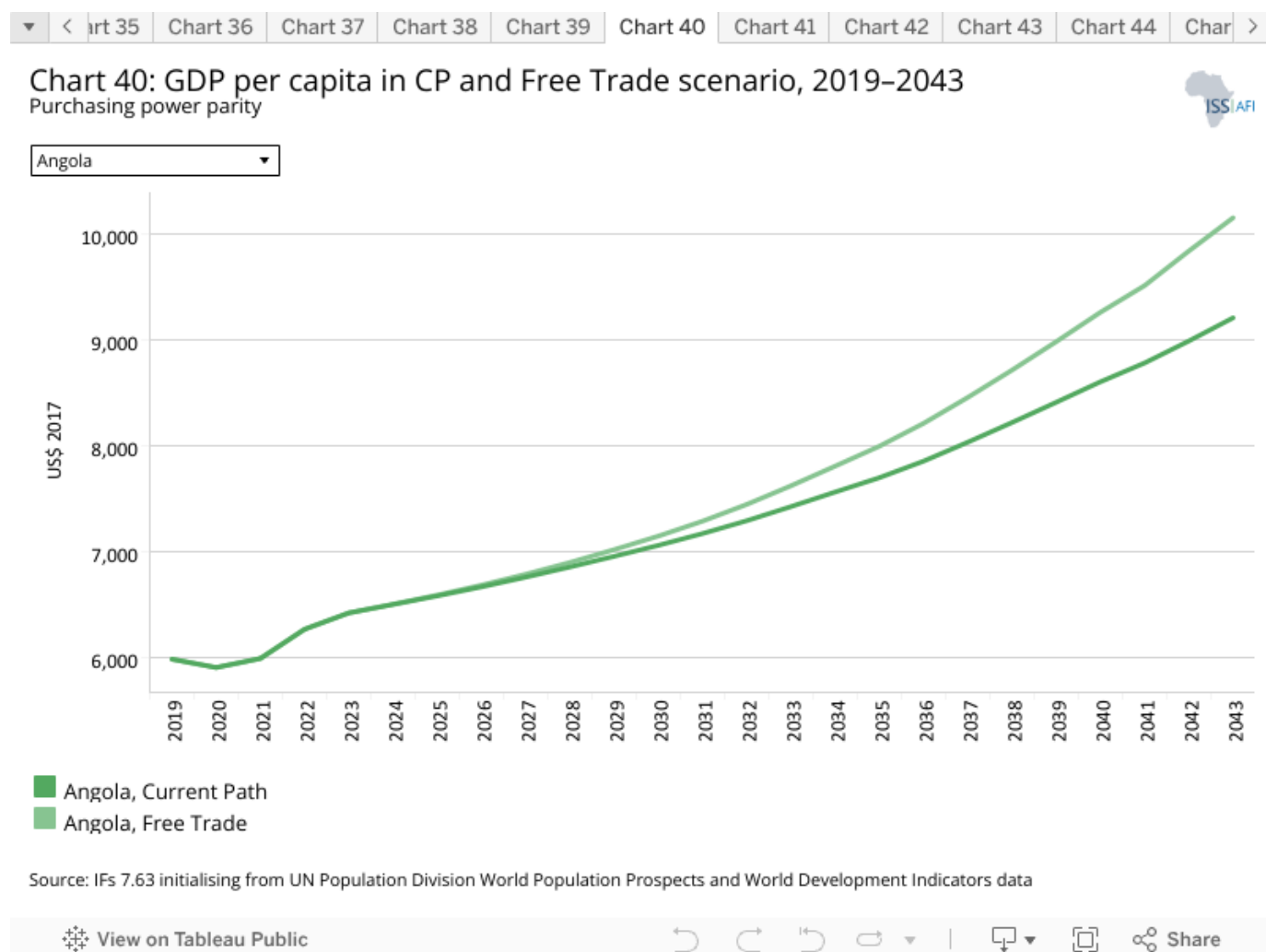
Angola's primary export is crude oil; in fact, the 1.57 million barrels of oil per day that Angola sent abroad in 2017 accounted for more than 95% of export earnings. Diamonds contributed most of the remaining 5%. Most of this oil is exported to China (Angola is the third largest crude oil supplier to China), and in the fourth quarter of 2020, India, Italy and Thailand followed behind China as the main destinations of Angolan oil.

In spite of its oil resources, refined oil is one of Angola's top imports. Angola relies heavily on imported fuel, largely due to a lack of refineries. But natural gas production has grown dramatically in recent years, from 337 billion cubic feet (BCF)

(equivalent to 56.3 MBOE, or million barrels of oil equivalent) in 2007 to 413 BCF (69 MBOE) in 2016. And Angola boasts vast reserves: in early 2018, Angola had 10.9 trillion cubic feet (1.82 BBOE, or billion barrels of oil equivalent) of proven natural gas reserves, accounting for 2% of Africa's proven reserves and 0.2% of global proven reserves.

In the Current Path forecast, Angola will continue to run a trade deficit, primarily due to the country's limited oil reserves and heavy dependence on imported fuel and agricultural goods. In the Free Trade scenario, Angola continues to run a trade deficit, but this deficit is smaller than on the Current Path. Improving trade conditions in Angola will require addressing its inhospitable business and trade climate. Indeed. Angola is among the most difficult countries for businesses. The World Bank ranked Angola as 177th among 190 economies in its Ease of Doing Business Index in 2020, down four places from the previous year. The index ranks countries based on the extent to which the regulatory environment is conducive to business operations and the protection of property rights. Meanwhile, the Fraser Institute's Index of Economic Freedom ranked Angola the 13th least economically free country in the world in 2019.
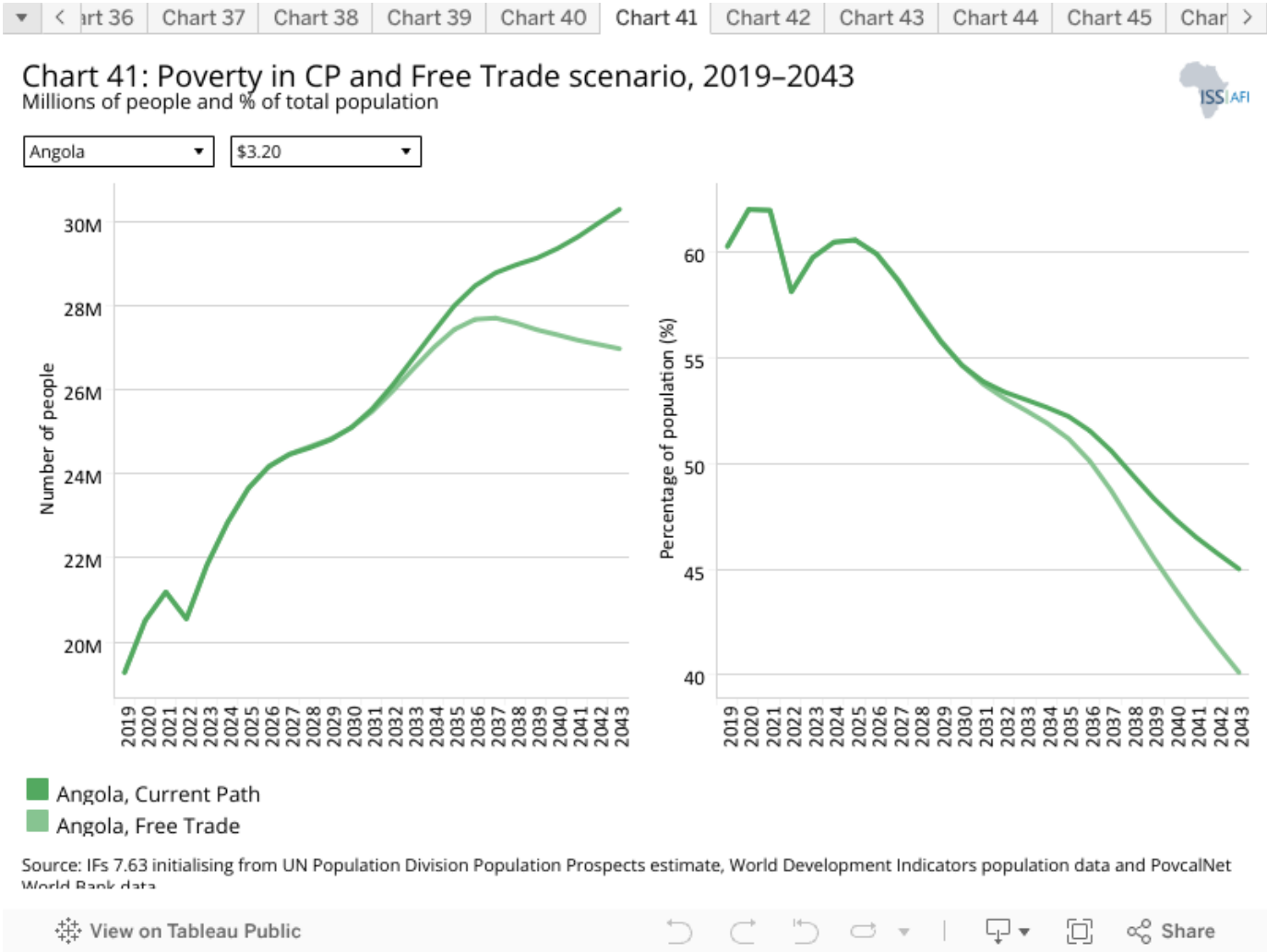
To improve these dismal rankings, the government needs to carry out a raft of reforms across every sector of government to allow for a more facilitating domestic private sector and eventually attract the private sector from elsewhere.

Chart 40: GDP per capita in CP and Free Trade scenario, 2019–2043
Purchasing power parity

Source: IFs 7.63 initialising from UN Population Division World Population Prospects and World Development Indicators data

On the Current Path, Angola's average incomes will outpace those of other lower middle-income countries in Africa and reach US$7 060 by 2030 and US$9 205 by 2043.

The increased economic freedom, productivity and exports modelled in the Free Trade scenario raise average incomes significantly over the medium- and long-term. By 2043, GDP per capita is projected to be US$943 greater in the Free Trade

scenario than on the Current Path, reflecting the importance of economic freedom and productivity to incomes in Angola. Indeed, the country is a difficult environment for businesses to flourish, making it challenging for Angolans to find and benefit from economic opportunities.

Chart 41: Poverty in CP and Free Trade scenario, 2019–2043
Millions of people and % of total population

Angola ▼ $3.20 ▼

Angola, Current Path
Angola, Free Trade

Source: IFs 7.63 initialising from UN Population Division Population Prospects estimate, World Development Indicators population data and PovcalNet World Bank data

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The greater economic freedom and improved productivity and exports in the Free Trade scenario do not substantially reduce poverty in Angola, and only take effect in the long term. By 2043, Angola's poverty rate falls to 40% in the Free Trade scenario — five percentage points lower than the Current Path forecast for that year (45%). This reduction in the poverty rate translates into roughly 3.3 million fewer extremely poor Angolans in 2043 compared to the Current Path forecast for that year.

Financial Flows scenario

Chart 42: Foreign aid in CP and Financial Flows scenario, 2019–2043
% of GDP
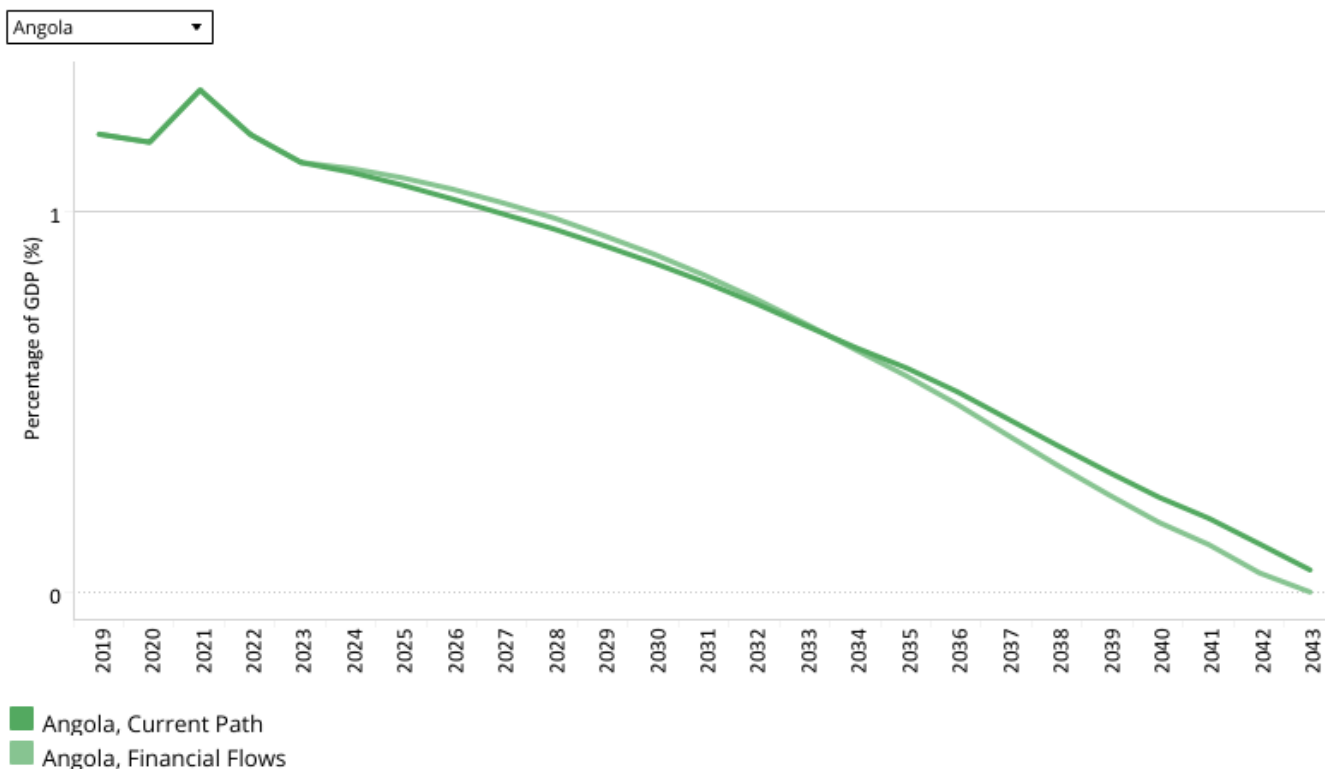
Source: IFs 7.63 initialising from Development Assistance Committee of the OECD data, and World Bank and OECD GNI estimates.

⁜ View on Tableau Public   ⟲ ⟳ ⟲ ⟳ ▼ | 🔽▼ ⬚ ⛛ Share

The Financial Flows scenario represents a reasonable but ambitious increase in worker remittances and aid flows to poor countries, and an increase in the stock of foreign direct investment (FDI) and additional portfolio investment inflows to middle-income countries. We also reduced outward financial flows to emulate a reduction in illicit financial outflows.

The intervention is explained here in the thematic part of the website.

Because of its oil wealth and perceptions of corruption, Angola has not been a major aid recipient since the end of the Cold War. In the Financial Flows scenario, foreign aid to Angola slightly increases over the next decade, making up approximately 1% of GDP in 2030. Aid, if used effectively, can play an important role in improving the livelihoods of people in developing countries by funding basic infrastructure, healthcare resources and other critical goods and services. It also modestly stimulates economic growth but because of its oil wealth and corruption, aid to Angola is forecast to decline by 2043.

Chart 43: Inflow of FDI in CP and Financial Flows scenario, 2019–2043
% of GDP
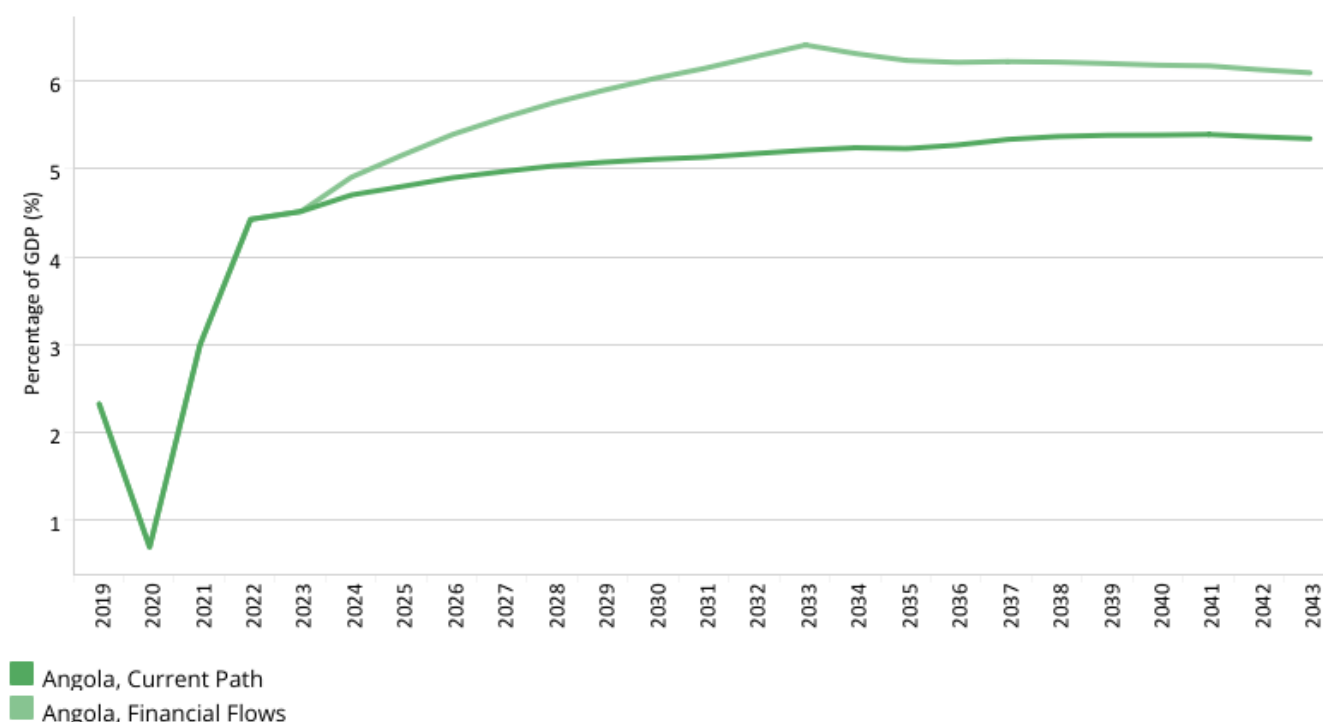
Source: IFs 7.63 initialising from International Monetary Fund World Economic Outlook database

Angola is among the most difficult countries for businesses to operate in, yet, because of the attraction of its oil sector, receives significantly more foreign direct investment (FDI) than other lower middle-income countries in Africa. The World Bank ranked Angola as 177th among 190 economies in its Ease of Doing Business Index in 2020, down four places from the previous year. The index ranks countries based on the extent to which their regulatory environment is conducive to business operations and the protection of property rights. Meanwhile, the Fraser Institute's Index of Economic Freedom ranked Angola the 13th least economically free country in the world in 2017, just above Argentina, Yemen, and the Central African Republic.

In the Financial Flows scenario, FDI to Angola increases more rapidly than in the Current Path forecast, reaching over 6% of GDP in the mid-2030s. On the Current Path, FDI peaks at 5.4% of GDP in 2040.

To become more attractive to investors, the government needs to carry out a raft of reforms across every sector of government to allow for a more facilitating domestic private sector and eventually attract the private sector from elsewhere.

Chart 44: Remittances in CP and Financial Flows scenario, 2019–2043
Billions US$ 2017 and % of GDP
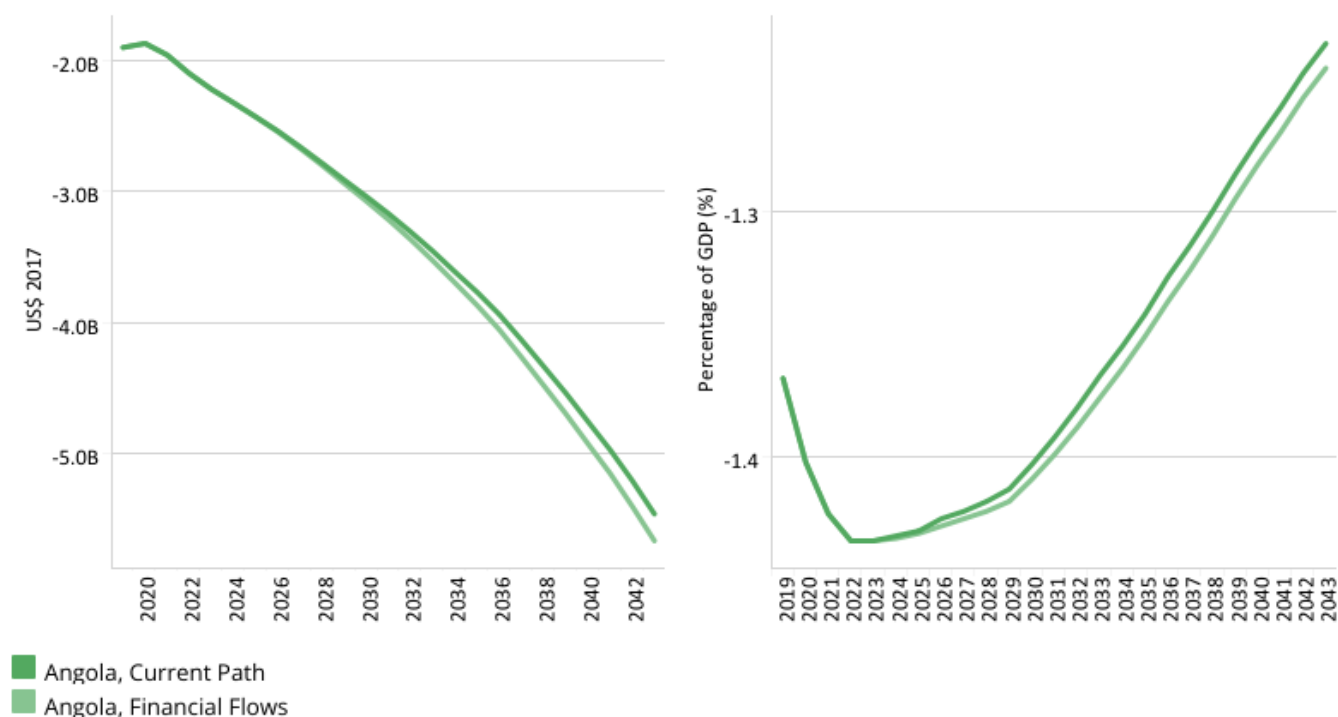
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Angola ▼

■ Angola, Current Path
■ Angola, Financial Flows

Source: IFs 7.63 initialising from World Development Indicators data
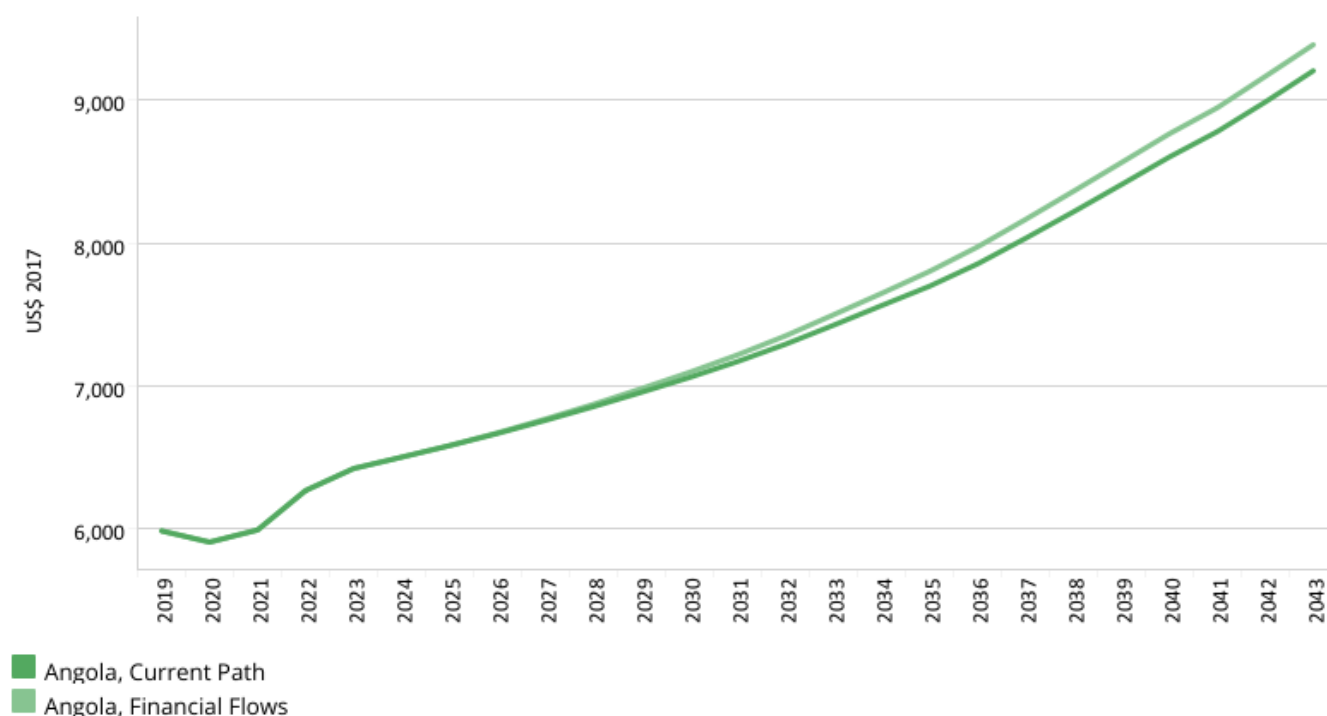
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Large remittance inflows can reduce poverty. However, like South Africa, Angola experiences net outflows. In 2019, nearly US$2 billion was estimated to leave the country. This trend will continue throughout the forecast horizon in the Current Path forecast. In the Financial Flows scenarios, this trend intensifies: more money leaves Angola in this scenario than on the Current Path, with nearly US$5.7 billion, or 1.2% of GDP, leaving the country in 2043.

Chart 45: GDP per capita in CP and Financial Flows scenario, 2019–2043
Purchasing power parity

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Angola ▾

■ Angola, Current Path
■ Angola, Financial Flows

Source: IFs 7.63 initialising from UN Population Division World Population Prospects and World Development Indicators data

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On the Current Path, Angola's average incomes will overtake those of other lower middle-income countries in Africa and reach US$7 060 by 2030 and US$9 205 by 2043.

The increased flows of aid and investment to Angola modelled in the Financial Flows scenario have a modest impact on incomes in Angola. By 2043, the GDP per capita would be US$9 387 — an additional US$182 over the Current Path forecast of US$9 205 for that year. To more substantially improve livelihoods in Angola, a more cross-cutting approach that addresses other urgent needs (water and sanitation infrastructure and basic health resources, for example) is necessary.

Chart 46: Poverty in CP and Financial Flows scenario, 2019–2043
Millions of people and % of total population

ISS|AFI

Angola ▼ $3.20 ▼

■ Angola, Current Path
■ Angola, Financial Flows
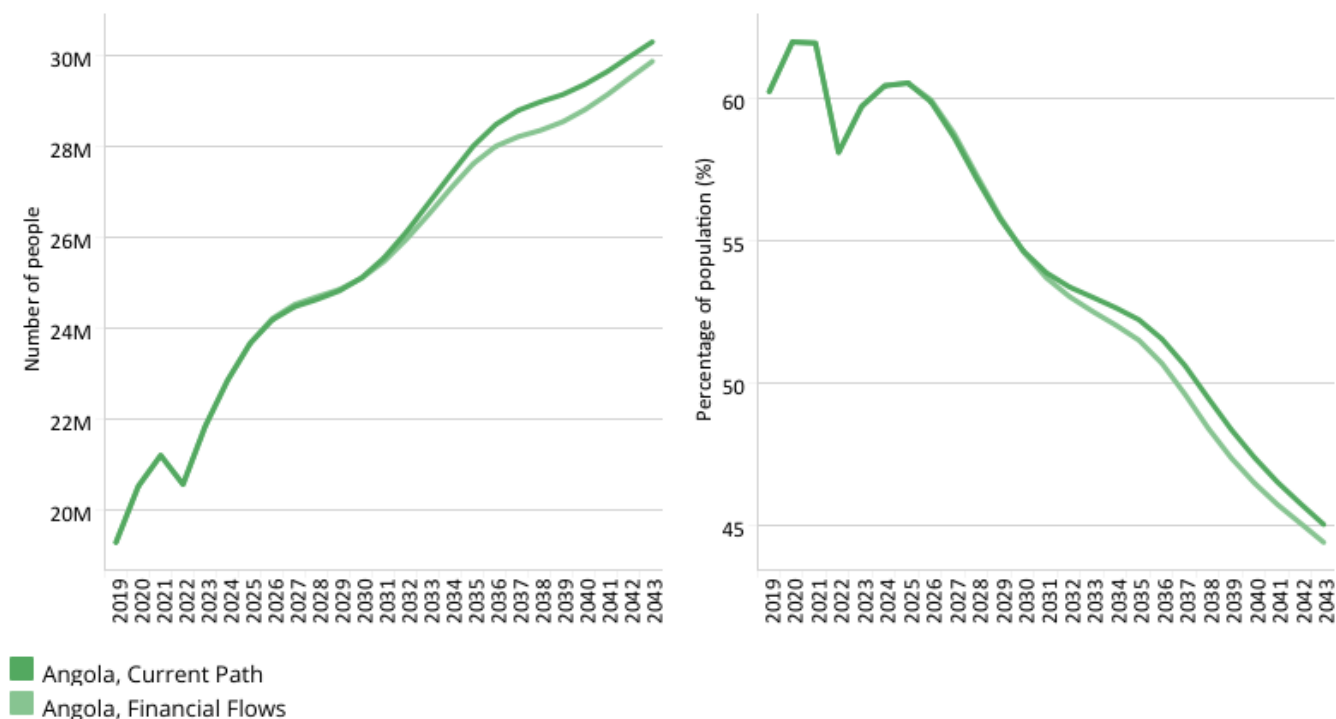
Source: IFs 7.63 initialising from UN Population Division Population Prospects estimate, World Development Indicators population data and PovcalNet World Bank data

⊹ View on Tableau Public   ↺ ↻ ↶ ↷ ▼ | ⬇▼ ⬚ ∞ Share

Trade openness will reduce poverty in the long term after initially increasing it due to the redistributive effects of trade. Most African countries export primary commodities and low-tech manufacturing products, and therefore a continental free trade agreement (AfCFTA) that reduces tariffs and non-tariff barriers across Africa will increase competition among countries in primary commodities and low-tech manufacturing exports. Countries with inefficient, high-cost manufacturing sectors might be displaced as the AfCFTA is implemented, thereby pushing up poverty rates. In the long term, as the economy adjusts and produces and exports its comparatively advantaged (lower relative cost) goods and services, poverty rates will decline.

More than just increased flows of foreign money to Angola is necessary to meaningfully reduce Angola's dire poverty. In the Financial Flows scenario, the number of Angolans living on less than US$3.20 per day grows through the forecast horizon at only a slightly slower pace than on the Current Path. As a multidimensional phenomenon, poverty requires a multidimensional solution.
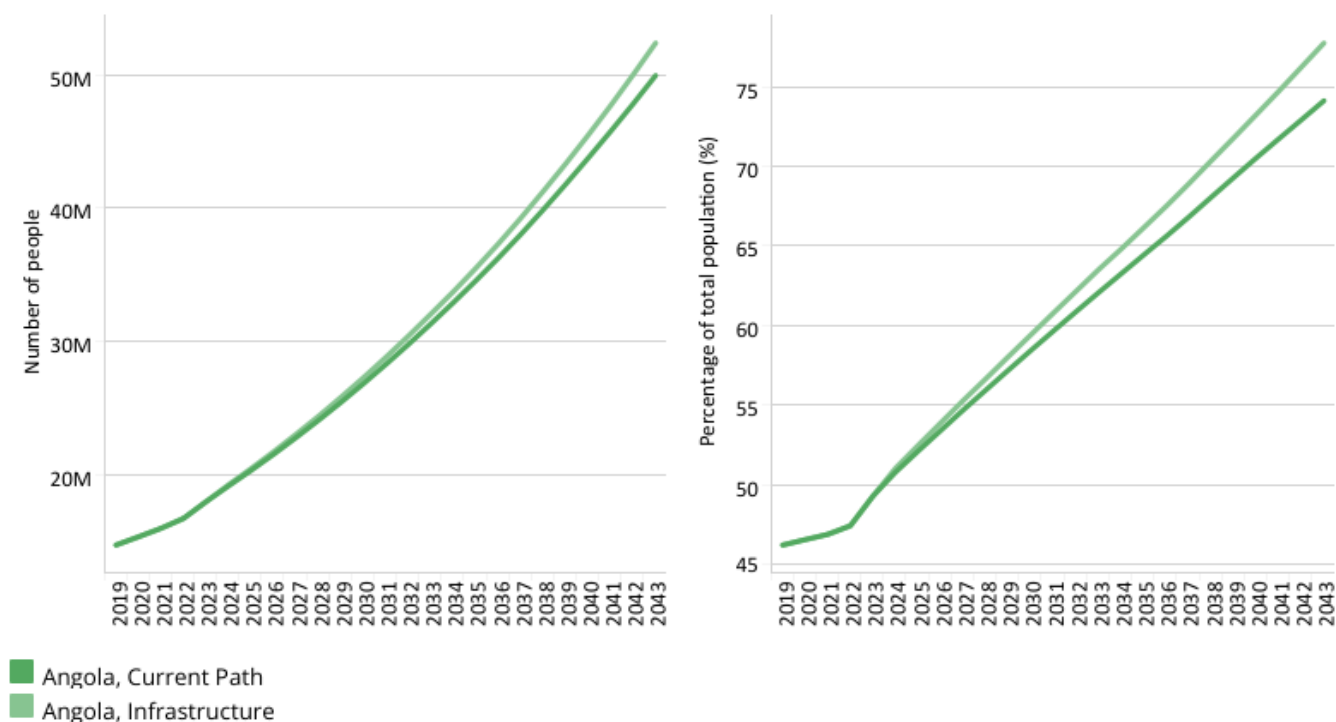
Infrastructure scenario

Chart 47: Electricity access in CP and Infrastructure scenario, 2019–2043
Millions of people and % of population

Angola | Total

■ Angola, Current Path
■ Angola, Infrastructure

Source: IFs 7.63 initialising from World Development Indicators data

⁘ View on Tableau Public   ↺ ↻ ↺ ↻ ▾ | ⬇▾ ⬚ ⤳ Share

The Infrastructure scenario represents a reasonable but ambitious increase in infrastructure spending across Africa, focusing on basic infrastructure (roads, water, sanitation, electricity access and ICT) in low-income countries and increasing emphasis on advanced infrastructure (such as ports, airports, railway and electricity generation) in higher-income countries.
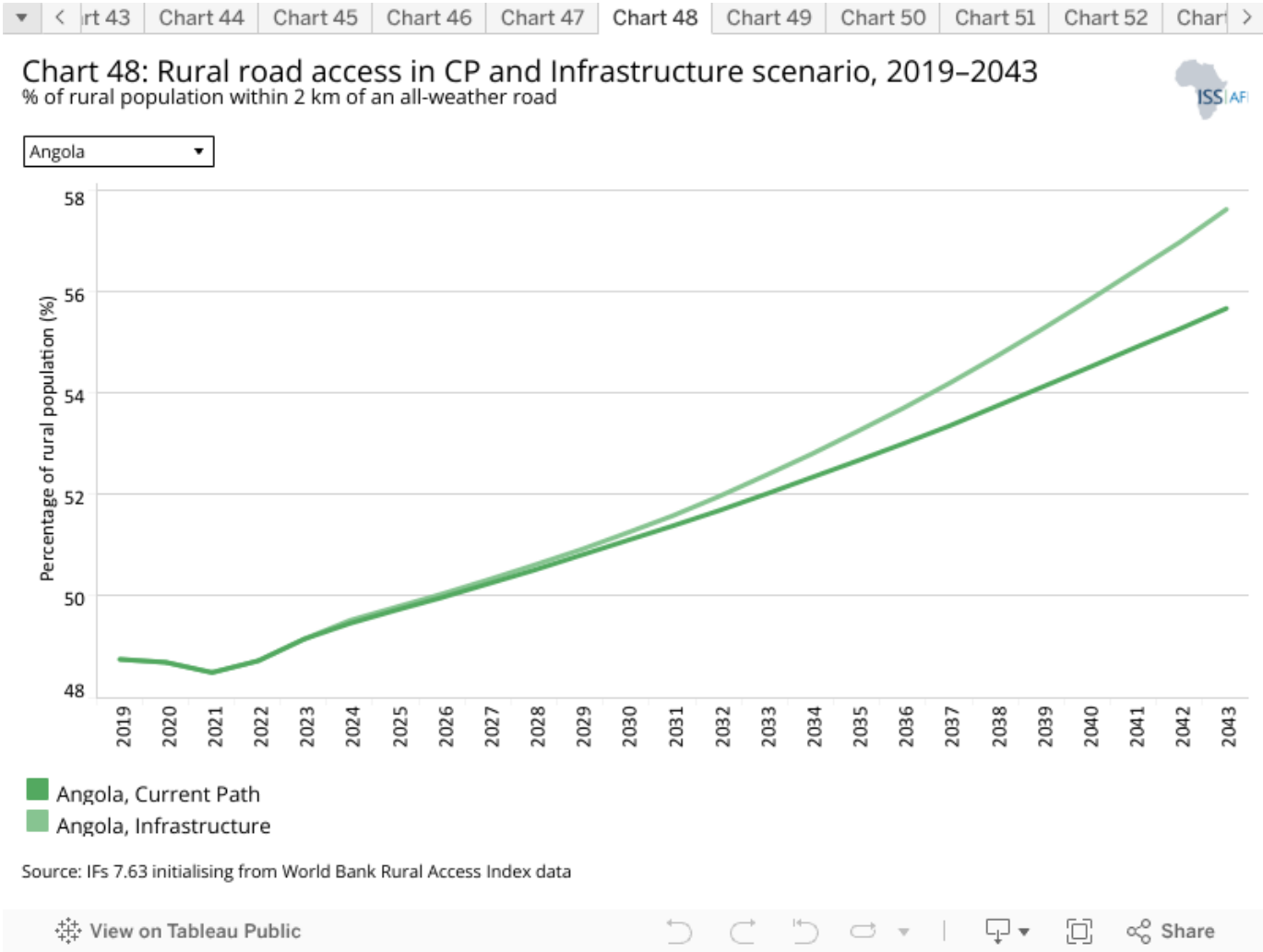
Note that health and sanitation infrastructure is included as part of the Health/WaSH scenario and that ICT infrastructure and more rapid uptake of renewables are part of the Leapfrogging scenario. The interventions there push directly on outcomes, whereas those modelled in this scenario increase infrastructure spending, indirectly boosting other forms of infrastructure, including that supporting health, sanitation and ICT.

The intervention is explained here in the thematic part of the website.

Angola's ailing basic infrastructure does not meet the needs of the country's growing and urbanising population.

In 2019, less than half of all Angolans (14.8 million people) had access to electricity. As little as 8% of the rural population and 43% of the urban population has access. Because the government struggles to generate and distribute uninterrupted electricity, residents and businesses rely heavily on petrol or diesel generators.

In the Infrastructure scenario, the increased infrastructure spending modestly improves electricity access in Angola. By 2043, an additional 3.6% of the Angolan population (approximately 2.4 million people) have access to electricity in the Infrastructure scenario.

Chart 48: Rural road access in CP and Infrastructure scenario, 2019–2043
% of rural population within 2 km of an all-weather road

Source: IFs 7.63 initialising from World Bank Rural Access Index data

Indicator 9.1.1 in the Sustainable Development Goals refers to the proportion of the rural population who live within 2 km of an all-season road and is captured in the Rural Access Index.

Angola has invested heavily in rehabilitating its roads since the end of the civil war, but poor road maintenance appears to remain a challenge, although there is little data regarding Angola's transport infrastructure. In general, roads in Angola's coastal regions are in better condition than those in the inland regions. There are reportedly very few active weighbridges and widespread public concern over the safety of bridges and roads and insufficient regulation and inspection, hindering further expansion of the road transport industry. In 2018, Angola ranked 159th of 167 countries globally on the World Bank's Logistics Performance Index, partly due to the poor conditions of trade- and transport-related infrastructure.

Angola's road network reportedly totals 76 000 km, marking an improvement over the 2011 estimate of 62 560 km and better than the 72 323 km reported in the 1970s. Available data suggest that an estimated 10% of Angola's roads were paved between 1975 and 2001, which then improved to 16% in 2013 and 24% in 2018.

In the Current Path forecast, the share of the rural population within 2 km from an all-weather road will improve from the 2019 estimate of 49% to 56% in 2043. The Infrastructure scenario presents a more optimistic picture, in which this percentage increases to 58% by 2043.

Chart 49: GDP per capita in CP and Infrastructure scenario, 2019–2043
Purchasing power parity
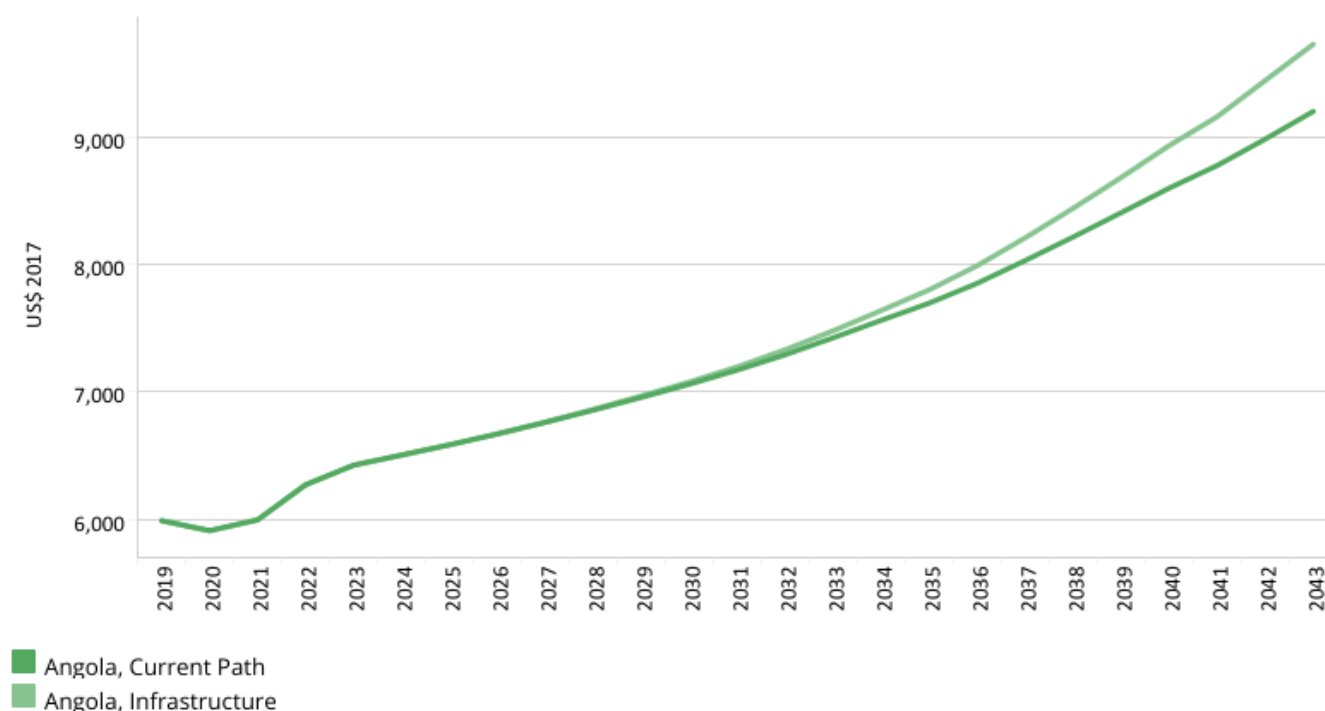
Angola, Current Path
Angola, Infrastructure

Source: IFs 7.63 initialising from UN Population Division World Population Prospects and World Development Indicators data

⁘ View on Tableau Public

On the Current Path, Angola's average incomes will overtake those of other lower middle-income countries in Africa and reach US$7 060 by 2030 and US$9 205 by 2043.

In the Infrastructure scenario, Angola's GDP per capita grows at a faster rate than on the Current Path. However, the increased infrastructure spending modelled in the Infrastructure scenario only impacts Angola's average income from 2030 onward. By 2043, GDP per capita reaches US$9 732 — US$528 greater than the Current Path forecast for that year.

Chart 50: Poverty in CP and Infrastructure scenario, 2019–2043
Millions of people and % of total population

ISS|AFI

[Angola ▼]   [$3.20 ▼]

■ Angola, Current Path
■ Angola, Infrastructure
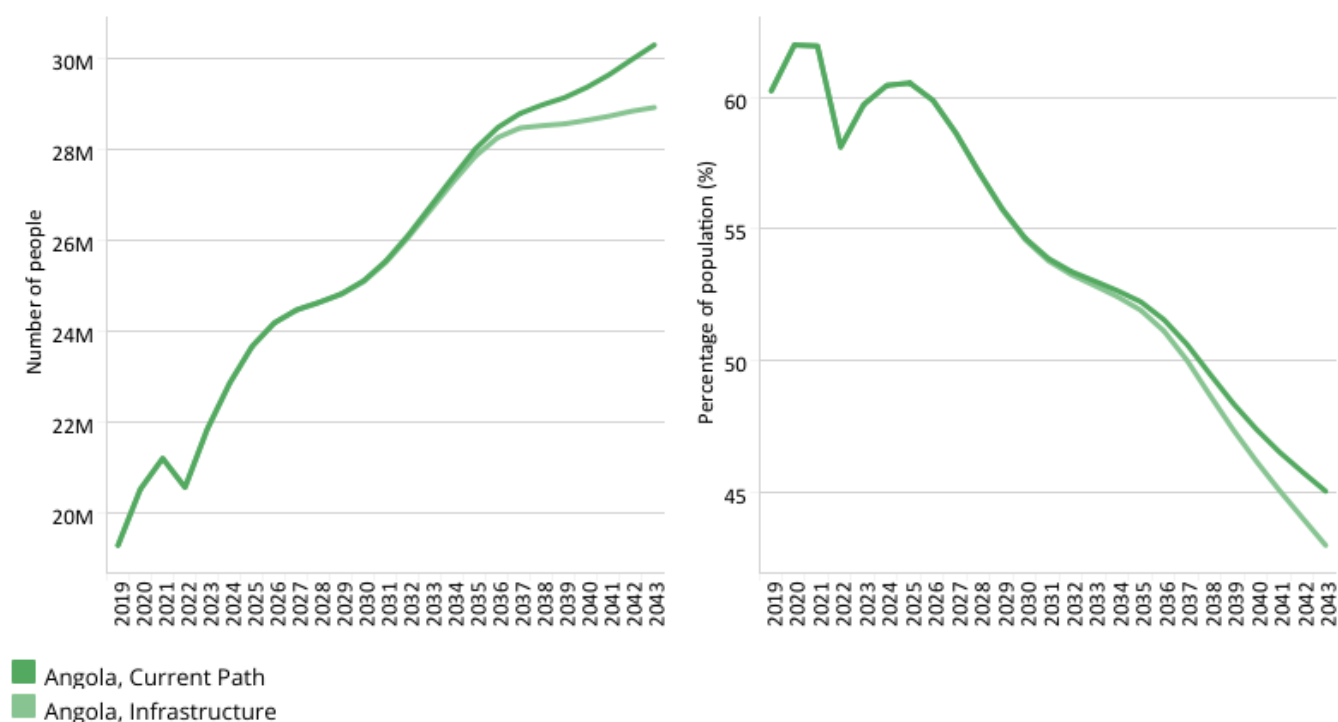
Source: IFs 7.63 initialising from UN Population Division Population Prospects estimate, World Development Indicators population data and PovcalNet World Bank data

⊹ View on Tableau Public   ↺ ↻ ↺ ⤳ ▼ | ⬇▼ ⬜ ⠐ Share

Because the Infrastructure scenario emulates more spending on more advanced infrastructure such as rail and ports, the scenario does little to alleviate Angola's widespread poverty. In both the Current Path forecast and in the Infrastructure scenario, the number of Angolans living on less than US$3.20 per day continues to grow through the forecast horizon.
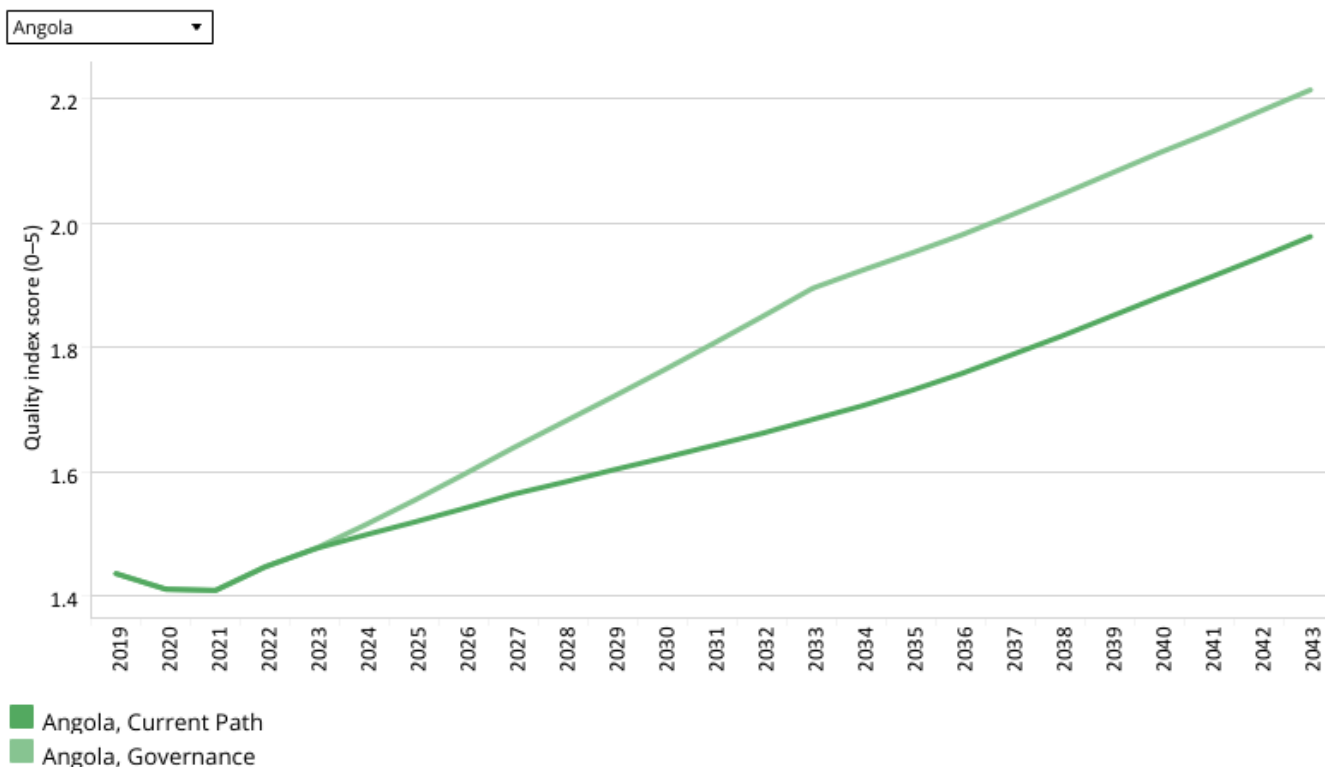
Chart 51: Gov effectiveness in CP and Governance scenario, 2019–2043
World Bank quality index score for government effectiveness

Angola ▼

Angola, Current Path
Angola, Governance

Source: IFs 7.63 initialising from Kaufmann, Kraay and Mastruzzi (2010) data

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The Governance scenario represents a reasonable but ambitious improvement in accountability and reduces corruption, and hence improves the quality of service delivery by government.

The intervention is explained here in the thematic part of the website.

As defined by the World Bank, government effectiveness 'captures perceptions of the quality of public services, the quality of the civil service and the degree of its independence from political pressures, the quality of policy formulation and implementation, and the credibility of the government's commitment to such policies'.

Chart 51 presents the impact of the interventions in the Governance scenario on government effectiveness.

Upon his election in August 2017, President Lourenço inherited a government bureaucracy that performs poorly on most governance indicators, a party that is generally suspicious if not hostile to businesses and comfortable with its reliance on income from oil, and a closed economy that discourages engagement in agriculture or indeed in small business. Angola's poor score of 1.44 out of a possible 5 in 2019 on the World Bank's Government Effectiveness Index reflects these issues and shows that the country is lagging behind the average of 1.89 for lower middle-income Africa.

Typical of resource-dependent countries, Angola's oil wealth has led to rent-seeking and corruption. Reports on

conspicuous consumption abound as do tales of the extent to which a small elite has appropriated the country's wealth. According to Transparency International's Corruption Perception Index, in 2021 Angola was ranked the 44th most corrupt country in the world.

In the Current Path forecast, Angola's score on the Government Effectiveness Index will only reach 1.89 — the 2019 average for lower middle-income Africa — in 2040. In the Governance scenario, government effectiveness in Angola improves more quickly than on the Current Path but does not catch up with the rest of lower middle-income Africa. To dramatically improve government effectiveness, the Angolan government must, above all, commit to greater transparency and adopt a zero-tolerance policy towards corruption.
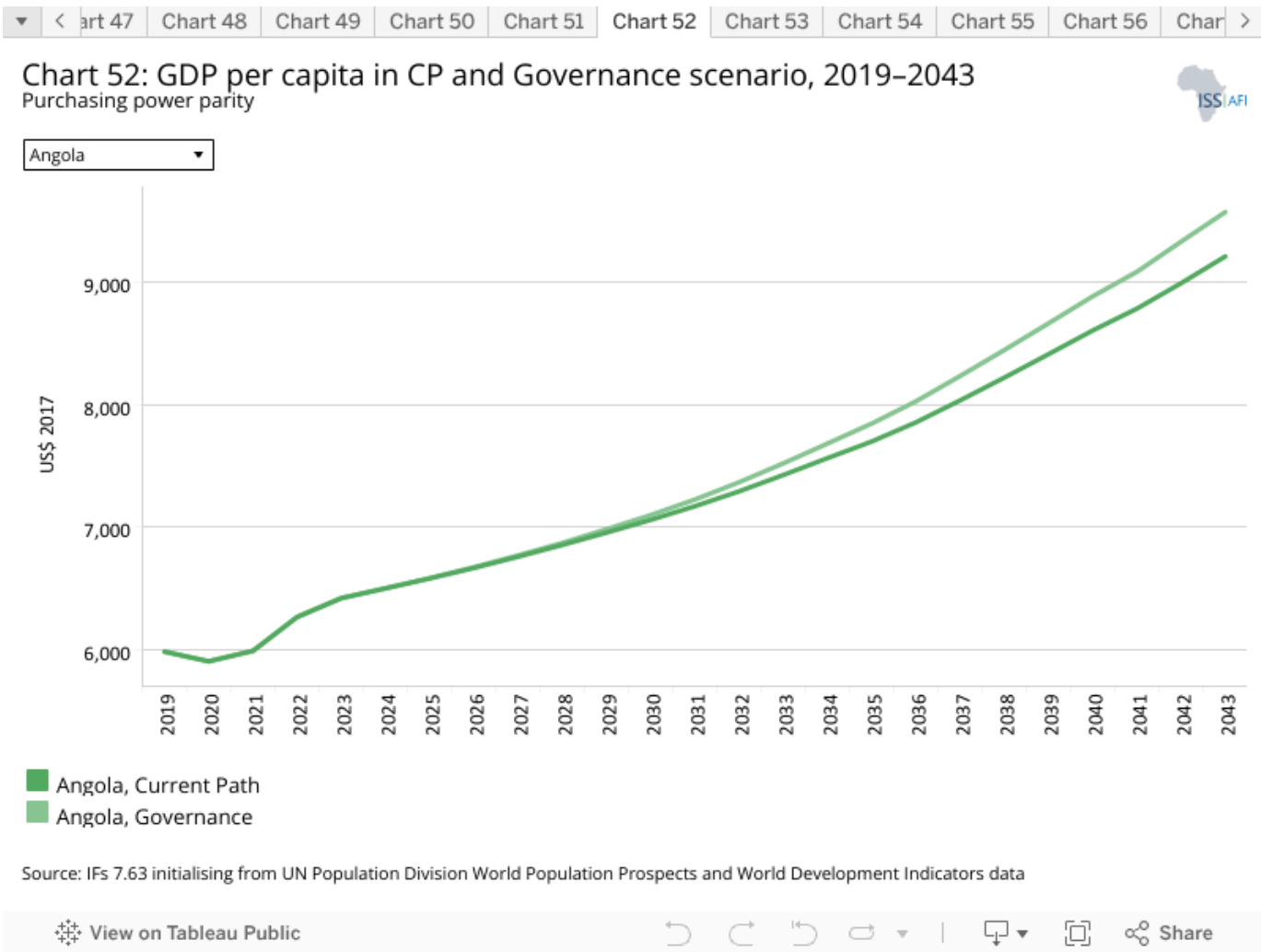

Chart 52: GDP per capita in CP and Governance scenario, 2019–2043
Purchasing power parity

Source: IFs 7.63 initialising from UN Population Division World Population Prospects and World Development Indicators data

On the Current Path, Angola's average incomes will outpace those of other lower middle-income countries in Africa and reach US$7 060 by 2030 and US$9 205 by 2043. In the Governance scenario, average incomes grow just slightly more quickly, reaching US$9 566 by 2043 (US$160 greater than the Current Path projection for that year).

The relatively modest impact of the interventions modelled in the Governance scenario on average incomes in Angola illustrate that a whole-of-government approach to reducing poverty and improving livelihoods is necessary.

Chart 53: Poverty in CP and Governance scenario, 2019–2043
Millions of people and % of total population

ISS|AF

| Angola ▼ | $3.20 ▼ |

■ Angola, Current Path
■ Angola, Governance
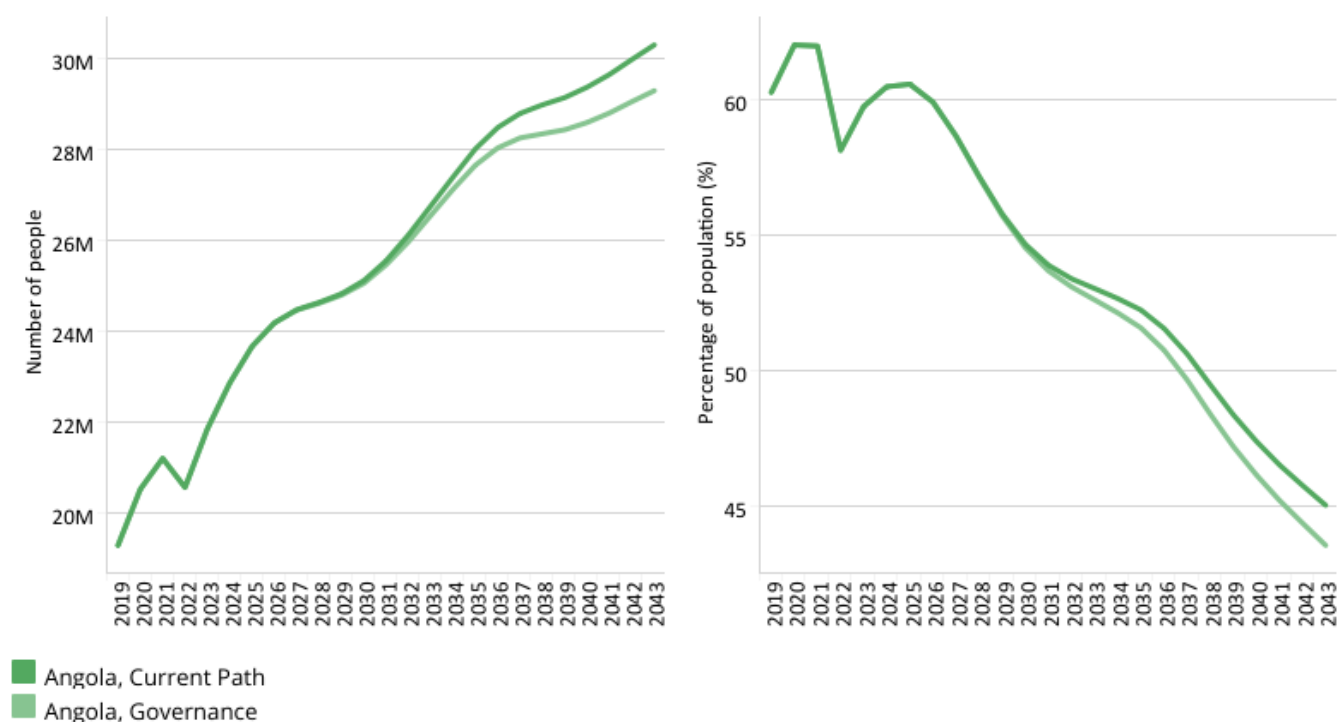
Source: IFs 7.63 initialising from UN Population Division Population Prospects estimate, World Development Indicators population data and PovcalNet World Bank data

⁜ View on Tableau Public   ↶ ↷ ↺ ↪ ▼ | 🖵▼ ⧉ ⚘ Share

In 2019, three out of every five Angolans (over 19 million people) were living in extreme poverty. On the Current Path, the percentage of the Angolan populations living in poverty will decrease slightly to 45% by 2043, but the absolute number of poor people in Angola will continue to grow owing to rapid population growth.

The improved governance modelled in the Governance scenario only modestly reduces levels of extreme poverty in Angola. In fact, even in the Governance scenario, the number of extremely poor people in Angola continues to grow over the coming decades before stabilising around 29 million people in 2040.
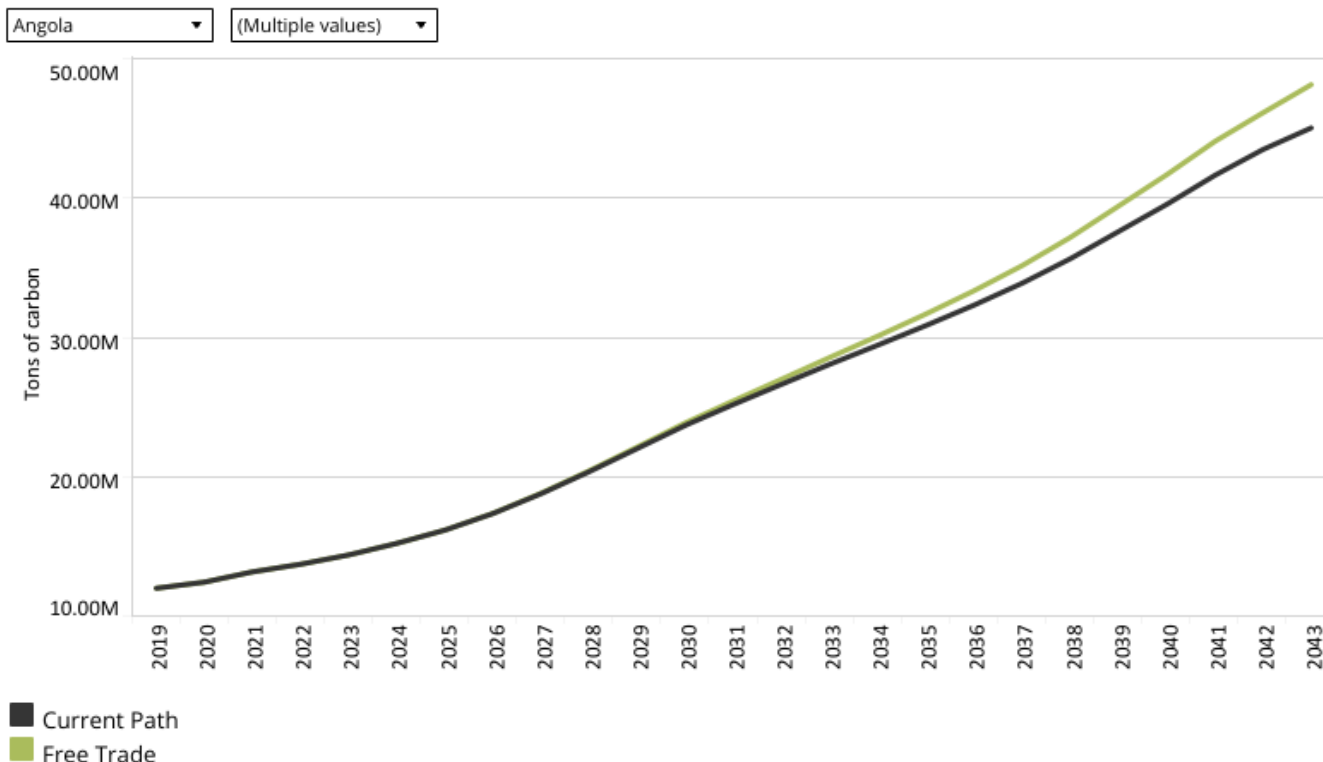
Impact of scenarios on carbon emissions

Chart 54: Carbon emissions in CP and scenarios, 2019–2043
Million tons of carbon (note, not CO_2 equivalent)

Legend:
- Current Path
- Free Trade

Source: IFs 7.63 initialising from Carbon Dioxide Information Analysis Center data

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This section presents projections for carbon emissions in the Current Path for Angola and the 11 scenarios. Note that IFs uses carbon equivalents rather than CO2 equivalents.

Unsurprisingly, Angola's energy sector is responsible for the majority of the country's carbon emissions, followed by the agriculture sector, although low by comparative levels. Angola emitted an estimated 12 million tons of carbon in 2019. In the Current Path forecast, the country will emit 45.1 million tons of carbon in 2043. In the other scenarios, Angola's emissions diverge only modestly from the Current Path, and in all scenarios, carbon emissions double by 2030 and exceed 40 million tons of carbon by 2043. While the expected growth of industry and manufacturing in Angola contributes to this projected increase in emissions, demographic growth plays an important role: generally speaking, as populations and economies grow, so too does demand for carbon-intensive goods and services, such as vehicles.

The Angolan government is participating in the global effort to reduce greenhouse gas emissions. As part of the Paris Climate Accords, Angola pledged to reduce its greenhouse gas emissions by 35% by 2030 by promoting renewable energy, among other measures. It is yet to be seen whether the Angolan government will be capable of mustering the political will to curb its aggressive pursuit of oil.

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About the authors

Dr Jakkie Cilliers is the ISS's founder and former executive director. He currently serves as chair of the ISS Board of Trustees, head of the African Futures and Innovation (AFI) programme at the Pretoria oce of the Institute, and is an extraodinary professor at the University of Pretoria. His 2017 best-seller Fate of the Nation addresses South Africa's futures from political, economic and social perspectives. His three most recent books, Africa First! Igniting a Growth Revolution (March 2020), The Future of Africa: Challenges and Opportunities (April 2021), and Africa Tomorrow: Pathways to Prosperity (June 2022) take a rigorous look at the continent as a whole.

About African Futures & Innovation

Scenarios and forecasting can help Africa identify and respond to opportunities and threats. The work of the African Futures & Innovation (AFI) program at the Institute for Security Studies aims to understand and address a widening gap between indices of wellbeing in Africa and elsewhere in the world. The AFI helps stakeholders understand likely future developments. Research findings and their policy implications are widely disseminated, often in collaboration with in-country partners. Forecasting tools inspire debate and provide insights into possible trajectories that inform planning, prioritisation and effective resource allocation. Africa's future depends on today's choices and actions by governments and their non-governmental and international partners. The AFI provides empirical data that informs short- and medium-term decisions with long-term implications. The AFI enhances Africa's capacity to prepare for and respond to future challenges. The program is headed by Dr Jakkie Cilliers.