

PART II

Are Household Needs Being Met?

Africa's infrastructure market structure is different from that of other regions because there are more poor households to serve, a higher share of the population lives in rural areas, and there is therefore a larger spread of population and production hubs. In addition, foreign and domestic investors do not always agree on infrastructure priorities, and the priorities are also likely to be different between investors and poor households. This second part of the book focuses on the level of coverage of the needs of households, and on issues related to affordability and quality of service. The water decade (in the 1990s) and the MDGs probably contributed to improvements in the water sector (although not in terms of access to piped water). For telecom sector, the explanation of the improvement in access rates is more on the side of the global payoffs of a technological revolution. Electricity, sanitation, and transport, however, are all lagging. In those sectors, access rates are hardly following the pace of population growth. Apart from a lack of access, there are also serious issues of affordability, actually more for households without access to formal networks than for households with access. In some areas small-scale providers are closing the infrastructure gaps for households but often at high production costs and at high profit margins, collected from poor households who are left out of the services provided by low-cost producers. Finally, quality is also poor in many countries, and production costs are an issue as well. For monitoring and evaluation, there is widespread lack of data on quality of service for the poor; hence, this is an area where data collection efforts are needed.