12 Where have all the alternatives gone?
The shrinking of African water policy options

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This chapter documents findings from research designed to identify successful alternatives to privatisation and commercialisation in the delivery of water and sanitation in Africa. Despite extensive efforts, our research found no examples of truly robust alternatives in sub-Saharan Africa (SSA), although more diverse and promising examples can be found in North Africa. What cases are in evidence are dominated by commercialisation and operate largely as private firms (i.e. corporatisation) rather than in a spirit of public sector solidarity. We found even fewer alternatives in the delivery of sanitation. As a result, our discussion centres on water.

The chapter begins with an overview of the background to water provision across the continent. In SSA, water services in urban areas are characterised by low rates of access, crumbling infrastructure, heavy reliance on donors in the context of major financing shortfalls, and growing numbers living in urban slums outside the reach of formal water service providers. This is in contrast with North Africa, where rates of access to both water and sanitation comfortably exceed those of other developing regions.

With this context in mind, the chapter sets out our research approach, which aimed to cast a wide net to encompass alternatives across the region at utility and municipality level as well as cases of community organisation and activism. Although privatisation has not been widespread in Africa, there has been a substantial policy shift towards marketisation throughout the region. The cases that met efficiency criteria were less successful in terms of social inclusion and equity in SSA. However, cases from North Africa – Morocco and Tunisia in particular – offered relevant comparative case studies.

The following section of the chapter highlights the successes and failures of the cases, which are grouped according to the type of alternative. The "Emerging Issues in African Water" section provides a review of some of the key issues that have shaped water delivery in the region, including the impact and changing nature of engagement with the private sector, the roles of different stakeholders, and the major challenge of finance. The chapter closes with an assessment of key areas for further research.

A limitation of our research is that it is largely desktop and therefore reliant on secondary sources (though enhanced via our close connections with the continent-wide Africa Water Network[1]). It may be that our findings reflect a bias in the literature and that other cases exist that have not been documented (especially given that this is an area that has received such little research attention to date). Alternatively, our findings may reflect a reality in the region that SSA is far behind the rest of the world in terms of the existence of robust alternatives to commercialised and privatised water provision (see the chapters on Asia and Latin America in this volume for comparisons). Even more disheartening is that our research examines cases that have been celebrated as good examples of public provision but upon closer inspection are successful only in terms of efficiency and not because they meet the needs of citizens.

THE STATE OF WATER DELIVERY IN AFRICA

Rates of access to water and sanitation in SSA lag far behind those of most other regions. Furthermore, improvements since 1990 have been modest at best (Table 12.1). According to the Millennium Development Goals (MDGs), the aim is to "halve, by 2015, the proportion of the population without sustainable access to safe drinking water and basic sanitation" (MDG 7 Target 3).[2] For SSA, these targets are relatively low, at just 75% coverage for water

Table 12.1 Regional coverage rates for water and sanitation (1990 and 2008)

	Drinking water coverage (% of population)		*Sanitation coverage (% of population)*	
	1990	*2008*	*1990*	*2008*
Western Asia	86	90	80	85
Latin America and Caribbean	85	93	69	80
Southeastern Asia	72	86	46	69
Eastern Asia	69	89	48	65
Commonwealth of Independent States	92	94	89	89
Oceania	51	50	55	53
Southern Asia	74	87	25	36
North Africa	88	92	72	89
Sub-Saharan Africa	49	60	28	31
Developing regions	71	84	41	52
Developed regions	99	100	99	99
World	77	87	54	61

Source: Joint Monitoring Programme (2010).

and 50% for sanitation by 2015, but they are unlikely to be achieved. Meanwhile, North Africa is set to achieve goals of access rates of 81% coverage for sanitation and 94% for safe drinking water (JMP 2008).

The data presented in Table 12.1 are provided by the Joint Monitoring Programme (JMP), which was established by the United Nations Children's Fund (UNICEF) and the World Health Organization (WHO) to monitor progress towards the MDGs. The information is useful for general comparisons, but figures may be misstated. A safe drinking water source is defined as one which, by nature of its construction and design, is likely to protect the water source from outside contamination, in particular from fecal matter. Such sources are, for JMP classification purposes, piped water into dwelling, plot, or yard, public tap/standpipe, tube well/borehole, protected dug well, protected spring, and rain water collection (JMP 2010).

To estimate the proportion of the population that has access to improved sources, the JMP collates data and information from national statistics offices and other relevant institutions through household surveys and national censuses. These reports present information on survey responses to questions regarding household water source. For example, in Ghana, the 2006 Multiple Indicator Cluster Survey (MICS) report provides survey information based on a sample of 6 302 households nationwide (StatsGhana 2006). In the survey, household representatives are asked to state their source of water. Translating this into the JMP, it is only users of "improved" drinking water sources that are defined as having access.

This approach has limitations. First, just because people pay a price for water, it may not be "affordable", as such usage may mean that they go without other essential items. Where households may say they have access, many may underconsume because of cost. Second, the MDGs and JMP data fail to incorporate the time taken to obtain water. Research indicates that water consumption remains fairly constant when the time taken to collect water is less than 30 minutes for the round trip but falls when collection takes longer than this (JMP 2008). According to the Ghana 2003 Demographic and Health Survey, nearly two out of 10 households in urban areas have to travel more than 15 minutes each way to access water. These people would be classified as having access according to the information in Table 12.1, even though the distance travelled to collect it is likely to mean that consumption is dangerously low.

In addition, there is a gender dimension to water collection. According to the MICS report in Ghana, adult women are more likely to be responsible for fetching drinking water than men and children. In households with better-educated heads, men play a relatively larger role in water collection than in households with less-educated heads (StatsGhana 2006). So, even though a respondent in a survey sample may be classified as having access, these data may disguise an onerous burden for women who travel long distances to collect water with adverse health implications as a result of carrying heavy loads, or inadequate consumption. The burden is greatest on women in households with the least education.

Notwithstanding weaknesses in the data, Table 12.2 provides more detail on coverage in SSA. Whereas progress has been made in reducing the *proportion* of the population without safe access since 1990 (this has fallen from 51% to 40%), improvements have failed to keep up with population growth so that the *absolute numbers* of those unserved have increased. In 2006, 331 million people in the region still did not have access to an improved drinking water source. In North Africa, the figure was approximately 8 million.

The data in Table 12.2 suggest that safe drinking water is unfairly distributed, with much lower rates of access in rural areas, but the percentage and number of people that lack safe access in urban areas is increasing. The overall proportion of the urban population served has stayed constant at 83%. The number of unserved has increased from 24.6 million to 51.7 million – a rise of 109%. North Africa also saw an increase in the absolute numbers of the urban population that lacked access to water by around 800 000 – an increase of 20% (authors' calculations derived from JMP 2010 data).

Statistics fail to capture the full extent of deprivation in urban areas of SSA. For many living in cities, the quality and quantity of water is not sufficient. Hundreds of thousands of people who supposedly have access to water only have access to communal pipes with intermittent water supply shared by many. In lower-income areas, people pay more for water, and there are additional costs associated with lack of access to safe water. For example, in SSA, people living in poverty spend at least one-third of their incomes on treatment of water-borne and water-related diseases such as diarrhoea and malaria (UN-Habitat 2006).

SSA has the highest rate of urban growth in the world (4.58%). Overall it is estimated that around 30% of the population lives in urban areas, and this proportion is rapidly increasing and is expected to reach more than 60% by 2050 (UNDESA 2007). Urban growth in SSA typically goes hand in hand with increases in urban slums. SSA has the highest prevalence of

Table 12.2 Proportion of the population of sub-Saharan Africa with access to improved water source

	1990				*2008*			
	Population (millions)	*% served*	*Population unserved (millions)*	*% unserved*	*Population (millions)*	*% served*	*Population unserved (millions)*	*% unserved*
Urban	145 029	83	24 655	17	304 301	83	51 731	17
Rural	372 932	36	238 676	64	518 135	47	274 611	53
Total	517 961	49	264 160	51	822 436	60	328 974	40

Source: Joint Monitoring Programme (2010).

slums in the world with 71.8% of its urban population living in such areas. In the last 15 years, the number of slum dwellers in the region has almost doubled from 101 million in 1990 to 199 million in 2005 and is expected to reach nearly 400 million in 2020. High rates of inequality prevail within some cities, particularly in countries such as South Africa, Namibia and Angola (UN-Habitat 2008a). Slum cities (i.e. where the prevalence of slums is dramatically high so that they are the common form of human settlement) are prevalent throughout SSA where poor households experience multiple shelter deprivations. In such circumstances, the lack of access to water is intertwined with unplanned growth, so the lack of basic services is not just attributable to the informality of the settlements but is rather "an outgrowth of inadequate planning, construction and social services" (UN-Habitat 2008a, 113).

While deprivation occurs even in planned communities, municipal authorities often refuse outright to extend essential services to unplanned neighbourhoods, putting thousands of families at risk. In some cases, settlements qualify as cities simply on account of the size of the population, but they lack the infrastructure and economic activities required to make the cities viable (UN-Habitat 2008a). Rapid urbanisation has meant that many residents are outside the scope of the piped network and depend on alternative water sources, which include private wells, small-scale private sector providers, community-organised provision, or unsafe water sources.

In much of SSA, the water system is characterised by aging infrastructure that is in need of repair and replacement, let alone extension to unserved areas. Recent research into infrastructure spending needs, carried out by the Africa Infrastructure Country Diagnostic (AICD), indicates a substantial financing gap. The authors of the AICD study estimate the required spending figure for water supply and sanitation (WSS) to be about US$21.9 billion a year. Current spending in the region is US$7.6 billion (Foster and Briceño-Garmendia 2010). The scope for increasing revenue from user fees is slim, given that average tariffs for the region are high – at between US$0.86–6.56/$m^3$. This is higher than in other developing regions, where the average tariff is between US$0.03–0.6/$m^3$, and not far off OECD countries, where average water tariffs are roughly US$1/$m^3$ (Foster and Briceño-Garmendia 2010).

Donor funding is far more significant in SSA than in other regions, and in water and sanitation than in other types of infrastructure. For the region as a whole, around 27% of capital expenditure is financed by donors and this rises to 35% for fragile states (Foster and Briceño-Garmendia 2010). However, other evidence suggests that the level of donor dependence is much higher. Research by WaterAid in Ghana indicates that between 2004 and 2010 around 85% of total planned investment in urban water was financed by donors (WaterAid 2005).

Privatisation to large companies has not been widespread in SSA as compared with other regions, and the proportion of infrastructure spending that

has come from the private sector for investment in water and sanitation in SSA is virtually zero. Some long-term concessions are still in operation in Côte d'Ivoire, Senegal, South Africa, Niger, and Mozambique, but no new concessions have been signed in the past 10 years (although the contract in Senegal has been extended). With long-term concessions in decline, methods for engaging with the private sector have metamorphosed. There has been a greater focus on short-term management contracts. Despite relatively low levels of privatisation, many countries – with extensive donor involvement – have implemented some kind of commercialisation in the water sector. As a result, public sector provision is often dominated by commercialised priorities leading to a blurring of the distinction between the two. Commercialisation often paves the way for the introduction of the private sector at some future stage. This is summarised by McDonald and Ruiters:

> The majority of water services in the region may still be in public hands – therefore allowing liberal analysts to argue that water has not been privatised in the region – but the reality is that virtually all water systems in southern Africa have been fundamentally transformed by the (growing) pressures of commodification, as evidenced by the increasing number of public–private partnerships and the running of public water services like a private business. (2005, 23)

To summarise, the water delivery system is dominated by low access and poorly maintained infrastructure in dire need of investment in a context of rapid urbanisation and growing slum prevalence. Large proportions of the urban population fall outside the scope of the formal piped water network. In such a context, efforts to privatise have brought little or no investment but have shaped policy frameworks within most countries, establishing commercialised utilities with a focus on efficiency and financial sustainability. Meanwhile, pressing concerns such as equity and social provision continue to be largely unaddressed.

LOOKING FOR "ALTERNATIVES"

Our aim was to identify alternatives to privatisation and commercialisation in Africa that were effective in terms of social justice and equity and not just according to narrow criteria of economic efficiency. There were three broad themes on which we searched for cases: effective public sector providers (as an alternative to privatised utilities), effective community provision (as an alternative to the domestic small-scale private sector), and examples of activism in response to privatisation.

Initially our focus was on sub-Saharan Africa, and we started with an A–Z list of 44 countries in this region. Our process of information gathering took the form of an ongoing Internet search and literature review, pursuing

contacts from research and activist networks, such as trade unions and academics, development and research institutions. When cases appeared to be of interest, we pursued strands of investigation, following up with more detailed research to find out more details where possible. We identified the main water provider in each country. Key web sources included World Bank websites for information on programmes completed, ongoing, or in the pipeline. The International Benchmarking database (www.ib-net.org) and data provided by the Global Water Operators' Partnership Alliance (GWOPA) provided some kind of overview of utility performance.

As this process evolved, some cases began to firm up while others fell by the wayside. From our original list, we began to exclude those where we knew that the main water utility had been privatised (Côte d'Ivoire, Senegal, Gabon, Mozambique, Ghana, Cameroon). We also excluded countries in crisis (Somalia) or where our initial enquiries indicated that the performance of the water sector has been abysmal or non-existent (such as Chad) when it became clear that these were unlikely to offer inspirational examples of public service delivery, or at least examples that had been documented (although we kept an open mind regarding community provision).

It became clear that the extent of neoliberal reforms in the water sector is particularly pervasive in SSA, even if privatisation has only been achieved in a few locations. Nigeria, for example, introduced a World Bank-sponsored Urban Water Sector Reform Project in 2004 with a view to encouraging full-scale privatisation. Although privatisation has not been achieved, it is clearly on the agenda and is shaping sector policy. Some countries are emerging from conflict and donors have been supporting reconstruction with infrastructure funding and promoting sector reform efforts including public sector partnerships (e.g. Sierra Leone, the Democratic Republic of the Congo [DRC], Burundi, the Central African Republic, Angola). After some initial enquiries, we expanded our geographical region to include North Africa when it emerged that Morocco and Tunisia would present suitable cases for our research and could be useful comparisons for those in SSA. This, then, is how our country selection was shaped.

In addition to exploring the activities of public utilities, we searched for evidence of smaller-scale service provision at the community level in each of the remaining countries. We also looked at activism and the effects of protests against neoliberal water sector policies. Our work in this area was less systematic, making enquiries of other academics and activists working in this field and exploring links and connections.

Despite the extensive reach of our research, detail is often lacking. We have largely had to rely on the work of others due to the scale of our task. Hence, what we have is a "mapping" of what has been documented about public and community provision of water in Africa. Our research is representative of the region as far as information is available. There may be other alternatives that have not yet been researched – for example, in smaller African countries such as Togo (where the utility, TdE, comes eighth in a

list of best performers in non-revenue water ([NRW; composed of unbilled consumption, apparent losses such as non-payment and metering inaccuracies, and real losses]) and Benin (where the utility SONEB scores highly on some efficiency measures [World Bank 2009]). From discussions it appears that the water utility in Mauritius, CWA, has strong performance, although there is little documented on this. There may also be successful subnational municipal providers that have not been researched (for example) in Tanzania and Botswana, and there are probably numerous additional community water systems across the region. The cases are representative of alternatives in the region as far as is generally known, but this is not a widely researched field.

Furthermore, the secondary information that is available is often clouded by a commercialisation perspective. Hence, the vast majority of performance indicators are in terms of "efficiency". This has meant that public sector utilities are measured by how much they are like the private sector, with a heavy emphasis on financial performance. For example, a literature review of the impact of reforms in Uganda, Tanzania, and Kenya would suggest that they are all successful because of improvements in commercial, financial, and technical performance. This is attributed to autonomy, incentives, and accountability (Mugisha and Berg 2007). It has proved extremely difficult to obtain data on social aspects of delivery such as labour standards or access for the poor. In addition, any meaningful analysis on the extent of genuine participation and public sector ethos is difficult to gauge without conducting detailed fieldwork.

Notwithstanding these constraints, our research is a major advance in collating the disparate literature on public and community alternatives to private provision in the region. Our cases demonstrate capacity and support for public and community provision that are the start of a positive engagement and of promotion of alternatives to privatisation. They should also be seen in relation to the other regions and sectors covered in this book.

Classifying alternatives

Our research has identified public providers and community systems that are classified and evaluated according to predetermined typologies and "success" criteria, as summarised in Table 12.3 (see Chapter 2, this volume, for a fuller discussion of research methodology). In addition, we have noted some successful community-managed systems of provision. These have been typically stimulated by an international NGO providing resources and impetus to local communities. These are numerous in the region in response to the failings of the dominant system of state-led provision to reach the urban poor. The findings from our research tentatively suggest that community-based organisations (CBOs) are more effective, however, when they operate in some kind of partnership with a public utility rather than in isolation.

Our findings fall into two organisational categories: single public sector agencies working alone to deliver a service (SiPs); and single

Table 12.3 African water alternatives

Country	*Type*	*Name*	*Area served*	*Population served*
Public provision				
Morocco	SiP	ONEP	National rural and urban – excluding some private concessions	27 million
Tunisia	SiP	SONEDE	National provider of drinking water	8.2 million
Uganda	SiP	NWSC	23 large towns	2.6 million
Burkina Faso	SiP	ONEA	42 cities	2.8 million
South Africa	SiP	Durban water, eThekwini Municipality	District – rural and urban	3.1 million
South Africa	SiP	Ugu	District – predominantly rural	700 000
Community provision				
Angola	SiNP/ PuNP	Development Workshop	73 standposts in Luanda	74 000
Ghana	SiNP	Savelugu		20 000
Ethiopia	SiNP	Hitosa	Villages and small towns	100 000
Zambia	SiNP/ PuNP	Lusaka water trusts		600 000
Tanzania	SiNP	Temeke	Peri-urban (Dar es Salaam)	43 000

non-profit agencies working alone to deliver a service (with no significant involvement by the state) (SiNPs). The typologies were blurred to some extent where, for example, public water utilities from one country were operating a management contract in another jurisdiction (as, for example, with publicly owned Rand Water from South Africa operating the Ghana Water Company Limited in Accra). While on one level this could be regarded as a public-public partnership (PuP), we have classified it as a form of privatisation on the grounds that the consortium was awarded the contract in a commercial tender competing against private companies (van Rooyen and Hall 2007).

Some of the utilities in our list have always been in the public sector. Two of these cases, Morocco (ONEP) and Tunisia (SONEDE), were established over 30 years ago and do not appear to be under threat of privatisation. Other SiPs were formed more recently in the wave of sectoral reform that has been experienced across the region since the 1990s and have had private sector participation to some degree and have been subject to commercialisation to some degree (ONEA in Burkina Faso and National Water and Sewerage Corporation [NWSC] in Uganda).

The SiNP cases are smaller than state utilities. These are typically communities that have mobilised (or been mobilised by others) to address poor service delivery. While they are not a substitute for SiPs, they are an important alternative to the domestic private sector as a means to provide water to poor households, and some present innovative practices that could be replicated by state agencies. Whereas we have categorised these as single non-profit agencies, our research tentatively indicates that they are typically more successful when they have the support of a state utility.

Our research also uncovered various types of protest against privatisation. Evidence from other regions indicates that social movement activism is a prelude to social change on a wider scale (see Chapter 6, this volume). The two countries that have demonstrated most resistance to privatisation are Ghana and South Africa. These are discussed in more detail below.

SUCCESSES AND FAILURES OF ALTERNATIVES

Our discussion of successes and failures centres on alternative public utilities, of which we identified two in North Africa and two in SSA. We also discuss two municipal alternatives from South Africa and cases we have identified of community provision. The cases from North Africa are more robust, while the cases from SSA are heavily commercialised, yet these are the best available public water system alternatives that we could identify in the subregion. Most countries in SSA have strong donor input into sector finance and policy design. The similarities of the policies of commercialisation and marketisation – if not actual privatisation – across SSA are striking.

SiPs I: Morocco and Tunisia

These state-owned water providers have income levels that are higher than several countries in the SSA region. The delivery of water in both is the responsibility of a public authority established in the late 1960s or early 1970s, and they have high rates of access and operate progressive tariff structures.

The water utility in Morocco, the National Office for Potable Water (ONEP), is an autonomous national public utility founded in 1972 and provides water to 27 million people with a staff of 6 800. ONEP is responsible for 99% of the water production and 70% of the distribution. Access rates for water are high (100% for urban water), although less so for sanitation (72% overall). ONEP is financially robust and has received no government subsidy since 1995, although it has received loans from donors, including the European Investment Bank and *Agence Française de Développement* (AFD). ONEP operates a progressive tariff structure, which aims to allow for solidarity between different regions to generate equality across the country as well as access for the poorest. ONEP is committed to public service delivery, has the right to water for all as a core value, and has a long-term vision (Bensaid 2008).

There was a movement towards privatisation in Morocco in the late 1990s. Two long-term lease contracts were signed with French companies for the distribution of water in Casablanca and Rabat. Now, according to Samir Bensaid, Director for Cooperation and Communication at ONEP, a key obstacle to the development of public service is the privatisation dogma along with frequent inappropriate technological choices and other dogmatic views, for example those regarding desalination. Internal obstacles to service improvement include bureaucracy, autocratic relationships with users, and lack of transparency (Bensaid 2008). ONEP is involved in two collaborative arrangements with water utilities in other SSA countries – namely, SNDE in Mauritania and SNEC in Cameroon.

In Tunisia, the national water distribution utility, *Société Nationale d'Exploitation et de Distribution des Eaux* (SONEDE), was created in 1968 under the supervision of the *Ministère de l'Agriculture et des Ressources Hydrauliques* (MARH). SONEDE is responsible for the delivery of water in both rural and urban areas. Water coverage is 99% in urban areas and 89% in rural areas. Unaccounted for water is at 20% (WSP and PPIAF 2009).

SONEDE is publicly owned and operated with a board of 12 directors. These are state agents or other government employees, one of which is a trade union representative. At the end of 2006, SONEDE employed 6 017 permanent staff. The law does not permit private sector participation in the form of leasing, build-operate-transfer, or disposition of financial assets, although SONEDE has introduced elements of the private sector over time.

SONEDE raises funds through user fees. The company is reported to have a strong technical performance but less-good customer service. Tunisia has several national social programmes relating to water supply and sanitation for the poor, including Presidential Programmes and a National Solidarity Fund (FSN) that aim to increase public service delivery in underprivileged urban and rural areas. These programmes are financed from the state budget, external loans, and donations. Cross-subsidies are implemented – for example, a water connection loan is offered by SONEDE, which is repayable over a period of between five and eight years at 11% interest as a surcharge on the quarterly water bill. Surpluses from user fees enable the utility to cover all operation and maintenance costs as well as contribute an average 40% of financing for new projects with the rest from medium- and long-term loans. SONEDE borrows mostly on domestic markets and seeks concessionary loans for larger infrastructure projects (WSP and PPIAF 2009).

The extent to which these water operators will be affected by the democratic uprisings and changes taking place in the region in 2011 remains to be seen but may bring further transparency and equity orientation to both.

SiPs II: Uganda and Burkina Faso

Two national public water and sanitation utilities, NWSC in Uganda and ONEA in Burkina Faso, are regularly cited as examples of successful public provision in SSA (for example, Baietti et al., 2006). They are both

operating in the context of very low incomes with extensive input from donors. NWSC in Uganda now provides consultancy to other water utilities in the region and the "Ugandan model" has been adopted elsewhere (for example, in Tanzania).

Although publicly owned and operated, these utilities have all undergone restructuring along neoliberal lines (i.e. corporatised). Both cases have been associated with privatisation to some degree as part of World Bank-sponsored reforms. In Burkina Faso, privatisation was a condition for the provision of donor investment funds. Donors were pressing the government of Burkina Faso to introduce a form of private sector participation similar to the long-term lease contracts adopted in Senegal and Niger, but the state insisted on a less invasive form of privatisation. ONEA signed a management contract with French multinational Veolia between 2001 and 2007. The private operator was appointed only to address financial aspects of utility management (World Bank 2008). In Uganda, NWSC had a three-year management contract with JBG Gauff (1997–2001), followed by a second management contract with Ondeo (2002–2004). These were considered a prelude to more far-reaching privatisation, although this did not occur largely because of a marked improvement in the performance of NWSC as well as a downturn in investor interest in the African water sector (Watasa 2009). Thus these alternatives have emerged in the context of the need for donor finance and donor support for privatisation.

The improvements that have taken place in these utilities are attributed to the introduction of performance contracts between the utility and the government. In Burkina Faso, three-year contract plans were introduced in 1993 between ONEA and the government of Burkina Faso that set targets for financial and commercial performance with targets for 34 indicators (WSP 2009a). In Uganda, the performance of NWSC was extremely poor in 1998 when a new board and CEO were appointed. The performance has improved dramatically, according to key indicators. In addition to a performance contract with the government, the utility established a series of Internally Delegated Area Management Contracts – IDAMCs. Under these, an area manager has to meet agreed targets, which typically include working ratio, cash operating margin, non-revenue water, collection efficiency, and connection ratio measured by reporting systems as well as unannounced visits from "checkers". If targets are met, the manager earns a bonus, which can be as much as 120% of base salary. If targets are not met, a penalty is paid (Muhairwe 2009a).

Tables 12.4 and 12.5 show some key performance indicators for NWSC and ONEA. While there has been a dramatic turnaround in NWSC, the tables show that ONEA was performing well before the start of the management contract.

The data in these tables are from presentations developed to demonstrate the strength of performance of these utilities, but this is virtually always in terms of productive efficiency. In Burkina Faso, the World Bank

Table 12.4 National Water and Sewerage Corporation (NWSC), Uganda, performance comparisons in 1998 and 2008

	1998	*2008*
Service coverage	48%	72%
Network coverage	Increased by >50%	NA
Total connections	50 826	202 559
Staff per 1 000 connections	36	7
NRW	60%	32.5%
Turnover (US$)	21 million	84 million

Source: Muhairwe (2009b).

Table 12.5 ONEA, Burkina Faso, performance comparisons in 2001 and 2007

	2001	*2007*
Access to piped water	71%	76%
Number of customers	75 150	145 650
Staff per 1 000 connections	8	5
UFW (% of production)	–	18
UFW (m^3/km/day)	5.5	4.8
Turnover (US$)	25 million	45 million

UFW = unaccounted-for water losses
Sources: Fall (2009), World Bank (2008; Burkina Faso project evaluation).

2008 project evaluation report stated that "[t]he financial equilibrium of the urban water sector was restored in 2006" (World Bank 2008, 10). This means that, according to the report, ONEA is fully able to cover its operational and maintenance costs and the debt service associated to its capital expenditures programmes without government subsidies.

In Uganda, NWSC can now cover operations and maintenance costs, as well as depreciation, through tariffs. However, despite substantial gains, according to the CEO, tariffs will not be sufficient to cover investment needs: "Full cost recovery tariffs remain a myth in most developing countries" because the tariff required would be unaffordable (Muhairwe 2009b). Alternative financing options are being explored. NWSC recently benefited from a debt-equity swap and is exploring the possibility of a local bond issue to raise funds for capital investment (Muhairwe 2008). This is potentially an innovative source of financing, but it is still in the planning stage. ONEA does not currently access local markets to finance capital infrastructure. While it is legally autonomous, ONEA struggles to collect payment from public sector customers (WSP and PPIAF 2009).

While the above indicators suggest that the performance of these utilities has been impressive, social policy has not featured strongly in reforms. There is now a "pro-poor" unit within NWSC, but the utility management has no incentive to serve poor households as they buy at the "social tariff", consume small amounts, and are less consistent payers. NWSC therefore applied to development agencies to help finance connections for poor households (Berg and Mugisha 2010).

According to Kouanda and Moudassir (2007), equity has deteriorated in Burkina Faso with the adoption of neoliberal reforms. Before the introduction of the management contract, water pricing was based on need and incomes from the profitable centres (the two biggest cities – Ouagadougou and Bobo), which were able to compensate for less profitable performance in other centres. Pricing objectives were aimed at achieving overall financial balance with cross-subsidy from different types of consumers. This was reportedly dismantled by Veolia, which, in the 2004 Contract Plan, stipulated that extension of network services will be dependent on financial profitability as well as size of the recipient community. The authors describe this as "a major turning point in ONEA's water supply policy" (Kouanda and Moudassir 2007, 17).

A different story is told by Matar Fall, the Lead Water and Sanitation Specialist at the World Bank, who presents a pre-reform case of low access and low productivity as well as an "inappropriate" tariff policy – i.e. one that is not based on cost recovery. The aim of the management contract was to restore "financial equilibrium" (Fall 2009, 27). According to Kouanda and Moudassir (2007), this has meant reducing charges to large-volume consumers and increasing charges to small-volume consumers.

In terms of pricing, both utilities have a progressive tariff policy with domestic users charged less than high-volume commercial users. The tariff structure is such that larger customers subsidise access for small consumers and large centres in the service area support small centres that are in deficit although the extent of this has reportedly been weakened in Burkina Faso (see above). Billing and collection rates for ONEA are hampered by non-payment by public institutions (WSP and PPIAF 2009).

In Uganda, NWSC water and sewerage rates are subject to annual indexation based on the domestic price index, exchange rate, foreign price indices, and electricity tariffs. As a result, the average tariff increased by 9.7% in 2008/2009, although the increase for large industrial users was only adjusted by 6%.[3]

There is concern about the amount of discretion of NWSC and the lack of adequate monitoring of the new mode of management (Watasa 2009). There is no independent regulator, and all reports are generated from within NWSC. The separation of roles (asset holding, regulation, and service provision), which was intended to create the institutional space for regulation, still has not happened. Some regulatory instruments are provided for and some exist but their effectiveness is questionable. While the institutional

arrangements seem to offer a good foundation for regulation, this is not the case in practice due to fragmentation (Water Dialogues 2007).

To conclude, then, these cases demonstrate that effective public provision is possible in the region – but the emphasis is clearly on a public utility that closely resembles the private sector. In a 2009 interview, the CEO of NWSC states that "[w]e must run this business as if it were a private entity",[4] and this model is being extended to other countries in the region.

As the examples show, the way in which "success" of "public" service provision in Africa is interpreted is extremely narrow. The fact that these models are not participatory is never discussed. Some have policies in place for "customer" feedback, but these do not offer genuine forms of democratic participation. Nor have the concerns of CBOs been listened to (Watasa 2009). Similarly, the commercialised SiPs identified above are not necessarily equitable. Their coverage performance is usually in terms of access, without reference to who is getting access, and there is little incentive to serve poor households when performance is measured in terms of productivity and financial efficiency.

In Uganda, specific measures were taken to improve staff motivation and incentives, and the union was involved in efforts to improve staff performance. The workforce was halved, reportedly with no complaint from unions, and according to the Deputy Secretary General of the Uganda Public Employees Union, the union was closely involved in the restructuring process. Staff now work harder but for more money, and unions from other countries are benchmarking with NWSC on how to work best with management (Werikhe 2006).

These systems are sustainable where they provide water to reliable customers, but without an effective cross-subsidy system, service for poor households will be at the whim of donors, which seems to be the case in Uganda. Sustainability is therefore questionable due to the precarious financial situation of these utilities. Progress has been made, but large investments are required to reach the many end users who live in poverty.

Municipal-level services

There exists a wide array of institutional arrangements for the delivery of water in SSA. Some countries, such as Uganda and Ghana, have a national utility that provides water to major urban areas with different arrangements for rural areas. Elsewhere, there is a bulk water provider, which produces water and then distributes it to intermediaries (such as local or district municipalities) that are responsible for delivery to end users (as in Namibia and in some parts of South Africa). Elsewhere, municipalities are responsible for all aspects of service delivery, including abstraction and distribution (such as Tanzania).

There are therefore hundreds of municipal water providers in the region, and there has been little systematic research into how these operate. While

some are listed in the data provided by GWOPA, these bald figures shed little light on how successful these utilities may be according to other criteria. Often these are established as part of programmes of decentralisation and with support from the World Bank, and the information that is available is typically in terms of efficiency. Hence, we know for example, that there are four "Category A" municipal providers in Tanzania (Arusha, Moshi, Tanga, and Mwanza), which means they are able to cover operation, maintenance, and staffing costs, but we could find little data on how effective they are at this, let alone on other aspects of performance such as support for poor households. Whereas some municipalities may perform well on an individual level, often the transfer of responsibility to the local level is part of a wider programme of decentralisation, which reduces the scope for cross-subsidy at the national level, as for example in Namibia (Bayliss 2008), thus perpetuating regional inequity.

This section discusses two South African municipal providers, Durban and Ugu District Municipalities, which meet some of the success criteria defined for this research. In Durban, the eThekwini Water and Sanitation (eTWS) unit of the eThekwini Municipality (ETM) is responsible for the provision of water and sanitation services to all customers in the municipality. The ETM water and sanitation unit is a ring-fenced municipal department serving 3.1 million people with 394 000 connections. Water coverage is estimated to be around 50%. ETM is described by some observers as one of the strongest water providers in SSA (WSP and PPIAF 2009).

ETM is pursuing social objectives, implementing a Basic Water and Sanitation Programme in the rural and peri-urban areas within its jurisdiction.[5] The aim of this programme is to provide an acceptable basic level of water and sanitation to all households in the eThekwini municipality by 2010. Priority is given to places at risk of water-borne disease. The project is funded in part by the national government's Municipal Infrastructure Grant.

ETM has received international acclaim. In 2007, the municipality won a United Nations Public Service Award for its Water and Sanitation Debt Relief Programme.[6] This was a scheme established to provide support for those who have difficulty paying their water bill, with a debt relief scheme that gives those with accumulated arrears a chance to write these off by signing a contract where they commit to pay the bill in full over a period of 20 months. Under the debt relief scheme, customers in arrears can choose to have a flow limiter installed to limit consumption to 200 litres a day. The ETM water and sanitation programme is also listed under the UN 2006 Best Practices database (www.unhabitat.org/bestpractices/2006).

However, while achievements have been made, there are concerns about the situation of poor households, a situation acknowledged even by ETM's own commissioned research, which found that "customer satisfaction" was lowest in poorest households (Hemson and Kvalsvig 2005). ETM provides different levels of service for different income levels. They provided a tank for the poorest, but they changed this to a flow limiter, which has been

designed to restrict the flow of water to those that cannot pay their bills. These have been extremely problematic and heavily criticised. The programme in Durban has, on the one hand, meant that some have access to clean water for the first time in their lives, but for others bills have escalated while the amount of water provided is restricted to a level barely enough to survive (Loftus 2005). After the "free basic water" amount (25 litres per person per day), prices increase steeply. Evidence shows that the average per person consumption for low-income consumers actually fell from 22 kilolitres/household/month in 1997 to 15 kilolitres/household/month in 2003 (Bond and Dugard 2008). So while the scheme provides water, it also depends on limiting the amount of water that is available to the poor and then helping them to pay. In addition, it provides only the most basic level of service to poor households. An alternative would be a pricing structure that is more skewed to higher volume consumption rather than trying to get more money out of the poorest (Bond and Dugard 2008).

Also in South Africa, Ugu District Municipality serves about 700 000 people in the province of KwaZulu-Natal. The majority of the population (84%) lives in rural areas. The unemployment rate is about 30% and is higher in rural areas. Despite these constraints, Ugu District Municipality is performing well relative to other municipalities according to official benchmarking. Ugu was found to have the highest rate of payment collection, the lowest proportion of water quality sample failures and an encouraging rate of eliminating backlogs – between 6% and 10% a year for water – although the rate for sanitation is just 2% a year (Water Dialogues 2008).

Ugu is regarded as financially sound with high revenue collection and accurate billing. Unaccounted-for water is around 35%. Connection charges for rural areas are subsidised by those for urban areas although prices still remain high. Consumption charges are also high. The Water Dialogues report cites evidence to show that

> a household using 50 kilolitres per month will pay R6 704.54 (US$857) per year whilst a rural household using 10 kilolitres per month would have to pay R1 094.16 (US$140) per year excluding water rates (if rates are included this increases to R2 184.86 [US$279] per year). Even at R1 094.16 per year, it equates to close on R100.00 (US$13) per month – not an inconsiderable cost for a low-income household. (Zybrands cited in Water Dialogues 2008, 29)

While prices for water consumption are regarded as expensive, there is a surprisingly high payment rate (96%), although some people access water from standpipes or rivers and thus do not pay for their water. For those with metered connections, costs are dear, and there is a question as to whether they even receive their free basic water allocation.

The biggest challenge for Ugu is increasing access. Around 40% of the population still does not have access to potable water, and 70% lacks

access to basic sanitation, although these are not spread evenly, with urban coastal areas receiving far better services than inland rural communities. Whereas this is due in part to historical inequities, there still seems to be a bias towards improving services for towns (Water Dialogues 2008). The utility operates well but struggles financially to make a dent in the long backlogs. Despite a very high payment rate, Ugu DM carries a considerable amount of debt.

Ugu employs 645 staff. They are 100% unionised and the utility has a good retention rate, but, in common with ETM in Durban, there are severe shortages in key skilled areas, and many positions, particularly in middle and upper management, are left unfilled for significant periods. It is reported that the workload has been increasing with increased infrastructure development. In talking to communities themselves, the Water Dialogues (2008) research found that communities dug their own trenches as the municipality will only dig to the end of the municipal pipeline.

There are concerns about accountability and monitoring of Ugu as well as water quality. There is a threat of pollution from industry and agriculture, but recent benchmarking showed that Ugu had low rates of failure of water quality samples. CBOs were not successful in Ugu. Originally they dominated delivery in rural areas, but the municipality chose to disband them and absorb the employees into the water company. CBOs tended to run up debts and lacked capacity. However, according to the Water Dialogues (2008) report, there is a gap in provision in rural areas, which could go some way to being filled by CBOs.

Although these cases of municipal provision are flawed, they show some innovative practices in reaching poorer communities and have made this a priority rather than just focusing on financial sustainability. There has been very little documented about municipal provision in the region, and there are probably many other relevant cases. A key element in these two cases is that investment is not financed by user charges but by a national fund. These municipalities are therefore not limited to being financially self-sufficient but can access national reserves to finance capital investment.

Community provision

As noted earlier, some African cities have very high rates of slum prevalence. In Angola, over 86% of the urban population lives in slum areas (UN-Habitat 2008b). Many of these areas are not reached by public (or private) water utilities. Those that do have a piped connection often do not have water flowing through them. To fill such gaps in service provision people turn to alternative means of accessing water. This can be through small-scale private providers, NGOs, or CBOs – or alternative unsafe sources. Faith-based organisations have also filled this gap. It is not unusual to find communities organising around water provision.

Effective public delivery to all households is a very long way off for most African urban areas. Service provision outside the limits of the utility is an element of water policy that has long been neglected, while attention has focused on improving the performance of the formal provider. Yet most poor households access water through such informal systems. These are not arrangements that are alternatives to the utility but must be considered in parallel.

Lack of formal water access has given rise to a range of private sector water entrepreneurs from sachet sellers to tanker trucks. These providers display all the entrepreneurial agility that is considered lacking in the public sector (customer care, no debts, threat of bankruptcy for poor performance). However, there is no reason to suggest that such providers would be anything but opportunistic and predatory, and anecdotal evidence suggests that this is the case in many situations. Community provision, although far from ideal, nevertheless presents an alternative model to domestic private provision.

This section considers successes and failures of five community-managed water systems: Hitosa (Ethiopia), Development Workshop (Angola), Savelugu (Ghana), Lusaka Water Trust (Zambia), and Temeke District (Tanzania). Each of these was established with support from an international donor or NGO. WaterAid, Development Workshop, UNICEF, Global 2000, Tearfund, CARE International, and the UK Department for International Development (DFID) were all involved in one or more of these.

The CBOs were established on a small scale initially. The smallest of these, in Savelugu, Ghana, is a small-town community system, which is ultimately a distribution system. Unlike other community-managed schemes in Ghana, the Savelugu community accesses its water from the national utility, Ghana Water Company Limited (GWCL; Adam 2005). Temeke in Tanzania began by serving 11 streets in three wards, but eventually this has been extended to 72 standposts covering a population of 43 000. Similarly the Development Workshop project in Angola has evolved over a 15-year period to now serve over 70 000 people (Cain and Mulenga 2009). The biggest of these CBOs is the Lusaka Water Trust, which serves around 600 000 in peri-urban settlements (WSP 2009b).

These systems are basic – they are typically concerned with a system for managing kiosks and standposts. The communities have organised (or been organised by others) into a hierarchy of water committees and water associations with different levels of decision-making powers. The management appoints a tap attendant or kiosk manager. Before these community systems were in place, local residents were paying high prices for water from secondary providers, travelling long distances, and/or using unsafe water. Each of these cases also involves the local water utility to some degree; for example, in Lusaka the utility provides maintenance for the Water Trust system and the local council is represented on the board (Mwanamwambwa et al., 2005). In Ghana the community buys water from the utility.

Community providers are often outside the realm of utility financing and are usually self-financing. To this extent, they fit the mould of neoliberal cost-recovery practices. On a practical level, experience from Angola shows that it is unrealistic to rely on funds from the state budget (Cain and Mulenga 2009). However, evidence from Tanzania indicates that the performance of these CBOs depends on resources and some have been successful in getting substantial donor funding (Dill 2010).

These community systems are far more participatory than the SiPs listed above. Key to their operation is elected officials and water user associations, but whether this has a genuine impact on outcomes is not yet known. While the institutional framework may be accountable and transparent, real decision making may take place behind the scenes. However, although the management system may not represent the interests of the most marginalised, this is an improvement on other options, which are typically paying a higher price to a private provider or using unsafe sources. The impact on quality is uncertain, but it is clear that in some cases (Angola for example), the water sold by private providers is of dubious quality and inferior to that provided by the community (Cain and Mulenga 2009).

In terms of labour conditions, many of the staff of water user associations are volunteers. Similarly, some of the construction of infrastructure is done by volunteers. This typically takes the labour of the poorest and most disadvantaged. In community provision, labour standards are non-existent and work is low-skilled, although skills are acquired on the job. This environment does not encourage unionisation. Some solidarity has been built with other social networks – for example, with South Africa's Homeless People's Federation and Zimbabwe's Dialogue on Shelter networking with Temeke District community-managed water (Glöckner et al., 2004).

Community organisations – like public utilities – encompass numerous different organisational structures. Community management is no guarantee of equitable management and some operate almost as private enterprises even if they are run on a not-for-profit basis. Whereas it is debatable whether such community-managed systems are sustainable, ultimately they need to be seen as a stop gap, a temporary means of alleviating the challenges of service delivery holes. They are no substitute for public provision. The risk with advocating such community systems is that the level of need will be overlooked; a crucial component has to be scaling up to reach the point of effective advocacy for improved public provision, as has happened in South Africa. Community-managed systems can be supported to be agents for social change when empowered to demand better public services.

Activism for public services

There has been surprisingly little resistance to privatisation in Africa outside South Africa and Ghana, which have created effective resistance movements (Prempeh 2006, Bond 2007). The relatively low levels of activism in

relation to water in Africa has largely come about as a result of co-option of civil society groups into service provision, whose lifeline is patronage from the state and donor agencies. In some countries, the high-handedness of dictatorial regimes contributed to the culture of silence. Advocating against neoliberal policies means either being starved of funding or facing state repression. Another factor is the marriage of convenience between civil society and political parties. In such circumstances, civil society is hesitant to criticise government policies (Bond 2007).

This situation is beginning to change as more and more people are challenging the dictators, and popular democracy is taking root in Africa (Prempeh 2006, Bond 2007), with events in North Africa in 2011 perhaps heralding a shift in public service delivery as well. Also, some of the donors and international organisations have come to realise that citizens' advocacy is more effective in promoting transparency and improving service delivery. The World Bank, DFID, the Danish International Development Agency (DANIDA), and the other major donors are setting up funds to support advocacy, although the ideological orientation of such activism may serve to reinforce rather than challenge privatisation.

There are some progressive networks beginning to form across the continent, however, notably through the Africa Water Network (AWN). This platform has a membership of 24 African countries, whose members come from very different backgrounds. There are three main categories of membership – namely, trade unions (predominantly from Public Services International affiliates), social movements, and NGOs, with some academics affiliated to the network. The formation of AWN has extended the reach of water activism on the continent (Pambazuka 2009), with AWN being key in initiating solidarity action across and within countries.

In November 2007, AWN organised a solidarity protest in Soweto, South Africa, against prepaid meters during its 2007 annual general meeting. AWN has also taken a stance against state-sponsored violence on water activism. In 2008, Malian police shot on a crowd protesting against water privatisation. One protester was shot dead (AFP 2008), and AWN organised a global signature campaign, which was delivered to all Malian embassies from the Americas to Africa. The reach of AWN is expanding gradually and also in a diverse way. AWN has not only been protesting but also engaging bodies such as the African Union and the United Nations (UN). In January 2009, AWN was elected to the UN-coordinated Steering Committee of the GWOPA to represent the interests of "civil society organisations".

A number of labour unions (Global Water Intelligence 2001, Hall et al., 2005) in Africa are also at the forefront of the struggle against water liberalisation and privatisation. The South African Municipal Workers Union (Samwu), the Ghana Trade Union Congress (GTUC), the Amalgamated Union of Public Corporation, Civil Service, Technical and Recreational Employees (AUPCCSTRE), the Kenyan Local Government Workers Union,

the Water Employees Trade Union of Malawi (WETUM), and the Tunisia *Syndicat Général des Eaux* (SGE) are the most active in these struggles, and these unions are also members of AWN.

South Africa

There are regular demonstrations and protests in South Africa over the poor state of service delivery and the treatment of low-income households. The Coalition against Water Privatisation (CAWP) was formed in 2003 bringing together a range of social movements and progressive NGOs (McKinley 2006). CAWP has been active in organising protests throughout South Africa against poor service delivery and the introduction of prepaid meters, including bringing in the gender dimension with demonstrations from Women for Water.

A key development in the social movement was a legal challenge on the basis of the right to water. The Centre for Applied Legal Studies (CALS) – a human rights research, advocacy and public interest litigation unit attached to the law school at the University of the Witwatersrand (Johannesburg) – together with CAWP and the Anti-Privatisation Forum (APF) constructed a water rights case against disconnections, the installation of prepaid meters, as well as the low amount of free basic water (FBW) provided by the government, focusing on the impoverished suburb of Phiri, in Soweto. The case was launched in the Johannesburg High Court in July 2006. After appeals, the final judgment was announced in October 2009, with the judge ruling that the installation of prepayment meters in Phiri was in fact lawful. Despite the setback, activism against water commercialisation – and the push for effective "public" service delivery – continues apace in the country, with one of the most vibrant networks on the continent.

Ghana

The National Coalition against Privatisation of Water (NCAP) was launched in May 2001 in Accra (Prempeh 2006). This initiative was taken by civil society (trade unions, NGOs, CBOs, student unions, and think tanks) to stop the privatisation of the Ghana Water Company Limited. According to historians (Bohman 2010), Ghanaian civil society has been active in protesting against harsh water policies since 1934, when the then colonial administration introduced water rates.

Although the campaign by NCAP has not been entirely successful, it can be said that the impact of the campaign was the change of the private sector contract from lease option to service management contract, a less extensive private arrangement. The coalition relied on media campaigns, community mobilisations, solidarity with international water activists, and fact-finding missions to influence the process. NCAP has continued with its campaign even when the contract was changed to a service management contract with

Aqua Vitens Rand Limited (AVRL). Within three years of the management contract, AVRL has been summoned to Parliament to answer questions on service standards, and two managing directors and one operations manager have been fired. These developments are a result of the public pressure generated by NCAP due to poor services. NCAP recently petitioned the serious fraud office to investigate the performance of AVRL vis-à-vis the contract performance benchmarks.

The campaign in Ghana has been a motivating factor for other countries on the continent to pick up the fight against privatisation, and NCAP has been instrumental in the formation of AWN. Within Ghana, NCAP has established a network including the following coalitions and platforms: National Coalition of Mining, Network for Women's Rights, Essential Service Platform, and Freedom of Information Bill Coalition. Being part of such a network of civil society groups makes it easier to popularise and mobilise national opinion for its advocacy for public water services.

EMERGING ISSUES IN AFRICAN WATER

This section highlights some of the main themes that emerged in the course of our mapping exercise and some of the constraints to the development of strong alternatives in the region. There are three strands to this analysis. We consider the changing face of privatisation in SSA, the role of different stakeholders (donors, governments, CBOs), and the issue of finance. A key message that underlies our findings is the importance of context and the need for water policy to be integrated into addressing wider issues of deprivation. The delivery of urban water and sanitation cannot be considered in isolation from ongoing rapid urbanisation. Many of the problems in the region stem from inherited tenure and administration systems that cannot cope with rapid urban growth.

The changing face of privatisation

Whereas privatisation was a core policy for many countries, only a handful of long-term concessions are still in place in the water sector today (Côte d'Ivoire, Senegal, Gabon, Niger, and Mozambique), largely with French companies (Saur, Veolia). According to Briceño-Garmendia et al. (2008), there have been 26 "private participation in infrastructure" transactions in water in SSA, but many have been controversial and problematic, with 40% of these cancelled before completion. Setting aside the extensive public sector and donor resources that were diverted to supporting privatisation, times have changed, and three main features dominate the post-privatisation institutional landscape.

First, while the extent of privatisation may be limited, many more countries have voiced commitment to private sector participation and have

introduced sector reforms that are designed to enable it. Many have taken measures to introduce commercialisation such as establishing a corporation or similar entity for the delivery of water with a focus on full cost recovery. Some countries have spent years trying to privatise, such as Malawi, which initially began trying to sell Blantyre and Lilongwe water boards in 1996 before finally agreeing to a management contract with Vitens in 2009, some 13 years later – and even this was only achieved with finance from the European Union and the European Investment Bank. Sector policy in SSA has been dominated by the push to attract the private sector. This contrasts with utilities in North Africa, whose cases outlined above demonstrate that public utilities in Morocco and Tunisia have been effective providers for decades.

The failure to achieve or sustain privatisation has meant that public providers are operating in a policy framework designed for the private sector. In Tanzania, for example, the privatisation contract collapsed after just 18 months when, despite extensive efforts – not to mention finance – the contract made the situation for the poor even worse (de Waal and Cooksey 2008). The utility has since been renationalised, but the state provider that stepped in to fill the gap left by City Water (DAWASCO) has taken on the same contractual framework as the private contractor. So, even if privatisation has not been that far-reaching in terms of contracts signed, its influence has been far more penetrating in the design of policy frameworks, and the scope for alternative approaches has been weakened.

As a result, there is a mismatch between the institutional reality and the policy framework. For example, vast amounts have been spent on consultants for such activities as writing legislation to enable private sector involvement and to establish independent regulators. Now, however, it emerges that the water sector in countries with an independent regulator performs no better than those without one (Foster and Briceño-Garmendia 2010). Although a number of countries have only recently created independent regulators, it seems they are irrelevant.

Similarly, countries have separated the ownership of infrastructure assets from the management of service delivery. This was designed to enable the private sector to step in with low-risk exposure so that the more risky activity of owning infrastructure remained with the state. However, if privatisation is not achieved, the benefit of creating two public sector bodies with similar but institutionally separate functions is not clear.

Second, expectations have been modified so that the private sector is no longer expected to provide finance or be exposed to any kind of risk but just to provide expertise in the form of management contracts. A report from the Public-Private Infrastructure Advisory Facility (PPIAF) indicates that it was a mistake to expect the private sector to bring finance and in fact it should only be expected to generate efficiency, but using public sector investment:

> A new generation of water PPP projects already has been gradually emerging, as these elements were being internalised by the market... More and more countries are adopting a PPP model in which investment is largely funded by public money with the private operator focusing on improving service and operational efficiency. (Marin 2009, 8)

Some of the examples of "successful" public sector utilities discussed above have had short-term private management contracts (Burkina Faso and Uganda). More recently, management contracts have been established that have been awarded to external public utilities rather than the private sector – for example, the management contract in Ghana is with Vitens and Rand Water, Dutch and South African public utilities, respectively. Similarly the management contract in Cameroon was awarded to ONEP, the Moroccan public utility. Hence we are seeing an increasing blurring of the divide between public and private as public utilities have been "privatised" in the past but are now public again, while some public providers are operating in a similar vein to the private sector.

In a further twist, privatisations with management contracts have increasingly taken the form of South-South collaboration – for example, with the Moroccan utility ONEP winning contracts in Cameroon and Mauritania. The Ugandan water utility, NWSC, is now operating in several countries, and this has generated revenue for the corporation. It operates as a consultancy and bids for tenders in the same way as private companies. In 2008 NWSC won contracts to provide services to utilities in Rwanda (Electrogaz), to the Zanzibar water authority, to DAWASA/DAWASCO in Tanzania and Kenya (NWSC 2009). NWSC also provided in-house training, as in June 2009, for civil servants from the water utility in Harar in Ethiopia. This is another mechanism for rolling out the Ugandan model with an emphasis (in the course training manual) on reducing non-revenue water, identifying "illegal" water use, improving billing, and how to provide good customer care. There is no reference to how to reach those most in need or how to identify when a household cannot pay or how to finance extensions to poor areas (NWSC 2009).

While collaboration between public utilities is vital, more research is needed to determine how to make best use of such capacity. For example, where a state provider is operating as a private company, financing their domestic operations with services to other African utilities, there is a lack of solidarity and dilution of the public sector ethos. Even when the "consultancies" are financed by donors, these costs have some opportunity value in that these are resources that could have been spent on some other component of donor support. While public sector workers should be compensated for time and expertise devoted to advising other providers, and this is on commercial terms, it is no different to the private sector.

An alternative means of collaboration is promoted by GWOPA, which aims to facilitate cooperation between public providers via the sharing of expertise rather than competing for tenders on a commercial basis. GWOPA is a UN initiative launched in August 2007 in Stockholm and formally constituted in January 2009 in Nairobi. The focus is on "political, financial and technical support to make Water Operators' Partnerships a more effective and systematic way of building capacity for utilities" (UN-Habitat 2009). Although GWOPA is a novelty, and some water activists are enthused about it, currently there is divergence about the use of a "quarantine" period against private sector companies who participate in the GWOPA. CSO representatives on the steering committee are arguing for 10 years' quarantine for any private company who is engaged in the GWOPA, but this has not been agreed by the private sector. Furthermore, support for GWOPA has been based in part on what may be an overly consensual concept of "public" that includes entities that are underpinned by extensive commercialisation (Boag and McDonald 2010).

Third, given the lack of interest from the international private sector, attention is turning to the domestic private sector. In urban areas of SSA, around half the population is outside the remit of the local water utility, obtaining water from alternative sources (small-scale private providers, NGOs, community organisations, or unsafe sources). This is more significant than in Latin America and East Asia, where about a quarter of the urban population obtains water from such sources. The operations of "water entrepreneurs" are attracting increasing attention (Marin 2009). This is a kind of privatisation by default in response to the failings of other forms of service delivery.

The role of donors, governments, and CBOs

The extent to which the World Bank agenda has permeated water sector policy throughout the region is difficult to overstate. Other donors also have been strong supporters of marketisation and corporatisation (for example, the British aid agency DFID). The reach of these donors goes beyond policy conditionality to incorporate a dominance of available literature plus a stranglehold on funding for "independent" consultants and policy advisers. Hence, throughout the region countries have adopted policy measures designed to suit the private sector.

However, not all donors have the same perspective. For example, while the World Bank is promoting marketisation and full cost recovery, UN-Habitat has championed GWOPA to strengthen capacity and spread knowledge in an extensive network of utility partners (UN-Habitat 2009). UN-Habitat underlines the need for an urban governance system that promotes the ownership of development strategies by local communities and incorporates principles of inclusiveness, sustainability, equity, and human rights (Moretto 2005). There is also considerable diversity in the funding

sources outlined in the cases discussed above. Greater awareness of the underlying policy perspective of funders could support public utilities in identifying supportive donor partners.

The political elite in sub-Saharan Africa are often closely allied with donors, be they ruling or in opposition. Their policies are generally geared towards pleasing the whims and caprice of donors. The case in point is the Ghana water sector reforms in 1999 when the World Bank was critical of the ruling government's implementation of the reforms and issued a threat:

> The Bank will be compelled to withdraw from this sector, as the Government plans to award a major contract under this program in a non-transparent manner. If this occurs, the Government has been informed that the allocated funds in the proposed lending program (FY2001), US$100 million, would be cancelled from the proposed three-year program. (World Bank 2000)

The Bank also makes a point of targeting political parties before they are elected: "Political will to carry out reform and to support its objectives has to be clearly expressed and manifested at the highest political level usually through a cabinet decision and a Letter of Sector Policy...Support of political opposition sought ahead of election (Ghana)" (World Bank 2002, 20).

This is in contrast with the political situation in Latin America, where the wave reviving leftist politics has had a positive effect on civil society as well as the organisation of public utilities who are experimenting with all manner of social management and open space managements (see Chapters 14, 15, and 16, this volume).

CBOs in service delivery have emerged, but they need help to scale up, and ultimately the aim should be for these to be replaced by the public sector. CBOs are not necessarily an antidote to privatisation and, unwittingly, community provision can reinforce the neoliberal policy framework by assuming responsibility for service delivery to the poorest and the more difficult to reach. This then eases demands on the utility that can then focus on provision for more attractive customers that are high-volume, wealthy ones. In addition, community provision can often fail to recognise the interests of the most marginalised and can serve as a means to support the vested interests in the community. Page (2002a, 486) demonstrates how the presentation of community management is shaped to suit the tastes of international donors, glossing over internal social divisions and tensions, based on a case in Kumbo, Cameroon, where he describes "the invention of community".

It has also been demonstrated that gender-based discrimination can be more powerful at the community level. A review of decentralisation and gender by Beall (2005) reveals that while locally based decision making might be expected to be empowering for women, in practice the local government was more infused with customary practices, orchestrated by

traditional authorities, which had a negative impact on women's prospects for democratic inclusion. She indicates that women are better able to participate in national rather than local administrations because local government is more open to informal systems that undermine or bypass formal rules and procedures. Women are less able to make use of informal structures.

There is some evidence to indicate that community provision cannot be sustained or scaled up without collaborating with the utility. Dill (2010) demonstrates in a review of different CBOs in Tanzania that they need public sector support to provide services on the scale required. However, this may also serve political ends. CBOs are not a threat to the government's sense of its own authority if it is allied to local government representatives, as demonstrated in Page's account of Cameroon (2002b). Whereas CBOs may be a stop gap in the face of the massive gaps in urban service delivery, they need to become advocacy movements for a universal public service.

Finance

As noted at the outset of this paper, water delivery in Africa is crippled by lack of finance. Even in the relatively positive cases discussed above, Burkina Faso and Uganda, cost-recovery tariffs can only cover operations and maintenance. One policy response has been to cut consumption subsidies to increase available revenue. However, tariffs are already high by developing country standards and the recommended tariff is close to that of OECD countries. Furthermore, it is not clear that additional revenue from removing subsidies will be simply translated into improving access. Many utilities provide only intermittent supply, which, aside from welfare implications, places a strain on the infrastructure. Regular supply to the existing network is often beyond existing capacity, so additional finance is likely to be invested in strengthening bulk water supply, which will improve services for those with existing connections.

The World Bank's response to this challenge is increasing the time frame over which the MDG targets are set and aiming for lower-cost technology (Foster and Briceño-Garmendia 2010). But this approach is simply about lowering expectations, and hence cost, to reduce the funding gap, and is not about sources of finance.

Some more innovative approaches to address the financing gap are emerging in the region, although they have yet to be tested. In Uganda NWSC will issue a local bond, according to its CEO. It is envisaged that the bond will entail a Medium Term Note of about Shs100 billion (US$60 million), which will be disbursed in tranches of about Shs30 billion (US$18 million) per annum over three years. It may be that an institutional investor (such as the National Social Security Fund – NSSF) takes up 60% of the bond (Muhairwe 2009a). Alternatively, water and sanitation, which typically attract only a small proportion of domestic public funding, could

be awarded more substantial budget allocation. Other possibilities include radically revising tariff structures, so they are skewed more to higher-volume consumption, while avoiding penalising high-density households.

Other sources of finance include a stepping up in donor finance but without attachment to policy conditionality. As mentioned earlier, the financing gap is around US$13 billion a year. This is substantial for the economies involved but appears feasible for donor country governments that have spent many times this amount bailing out financial institutions in the 2008–2009 financial crisis.

There is potentially a tension between financial independence and social provision as utilities will be attracted to high-volume consumers that are regular payers if performance is measured in financial terms. The World Bank has been behind a drive towards financial sustainability for utilities, so it comes as no surprise that social policy has been neglected. This is raised in a supporting paper for the AICD: "The culture of many utilities, particularly those without incentives aligned to broader policies of expanding access, tends to center around technical aspects of service delivery, and meeting financial performance targets" (Keener at al, 2009, 37). Although finance is needed, so is a change in ethos so that access for all, rather than revenue, becomes the policy goal.

CONCLUSION AND WAYS FORWARD

This chapter attempts to bring together findings on alternatives to commercialisation in the water sector in sub-Saharan Africa. The extent of alternatives is thin at this stage but is the result of both far-reaching neoliberal policies as well as a research agenda that has so far perpetuated these policies so that policy and research are closely linked (see Bayliss 2011). Far more research is required, particularly along three key themes. First and foremost, more investigation is required both with the cases cited above – in terms of their social and equitable approach beyond their financial performance – and into other potential alternatives. Promising cases that have emerged include Botswana and Tanzania municipalities (including Zanzibar) as well as Togo and Benin. More in-depth research also needs to consider the ways in which water features in social provision, exploring such issues as the linkages that exist with housing and health services as well as slum upgrading.

Second, in terms of future policy directions, the scope for cooperation between public providers is important, and key to this would be to understand the different terms of engagement for partnerships between public operators. A suitable starting point would be an evaluation of the different relationships in current collaborative arrangements – between ONEP (Morocco) working in Cameroon and Mauritania compared with NWSC (Uganda) working in Tanzania and Kenya, and Rand Water (South Africa)

working in Ghana. This research would feed into understanding how to make best use of public utilities in the region and strengthen solidarity.

Third, additional research should also investigate the role and approach of donors in the region to identify differences in ethos and approach and to determine how donors can best support water delivery in the region to create accountable, equitable, participatory, sustainable systems of *public* provision.

To advance advocacy, we need to highlight the successes that have emerged while acknowledging their limitations. By global standards, there are no examples of "successes" in the delivery of water and sanitation in SSA that satisfactorily meet the baseline criteria established for this research project. Those that are considered a relative success in the regional context would be sorely lacking when compared with examples from elsewhere. The dilemma is whether to lower the bar because of the regional lack of good examples. Our cases from SSA are not robust but show some promise. We would argue that there is a need to engage with the weaker success examples in SSA as well as the cases from Morocco and Tunisia.

The cases presented here are far more imbued with neoliberalism than those in Latin America, which presents more vigorous alternatives. However, in terms of advocacy, our view is that we need to work within existing frameworks rather than aiming to bring in an alternative model wholesale from another region. We would argue that the historical and political context has shaped the existing pattern of delivery in Africa and will continue to do so. Thus, a push for change will be more effective by working with what is already in existence rather than aiming to supplant current frameworks with models that may be too contextually dependent to be effective in the African context.

Finally, our research needs to have broad reach to be of practical relevance and to have policy impact. We would therefore aim to support organisations working with alternatives. We would, for example, anticipate working with GWOPA to explore and establish concrete ways in which public utilities can support each other, as well as with trade unions promoting public provision. We would also recommend providing support at the community level to promote alternatives to the domestic private sector and direct support to include advocacy to put pressure on governments to provide services and to encourage scaling up. The reach and influence of such research would depend on the production of easily accessible and widely disseminated information, which would be vital in challenging the dominance of information provided by donor organisations.

NOTES

1. See www.africawaternetwork.org.
2. UN (United Nations). www.un.org/millenniumgoals/environ.shtml.
3. NWSC. www.nwsc.co.ug/index10.php (accessed 15 December 2009).

4. NWSC press release, "2009 NWSC Marks 35 Years in Existence" (posted on 1 February 2009).
5. www.durban.gov.za/durban/services/water_and_sanitation.
6. www.unpan1.un.org/intradoc/groups/public/documents/UN/UNPAN026042.pdf (accessed 19 January 2010).

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