This Issue Note presents the current status and trends captured by key Comprehensive Africa Agriculture Development Programme (CAADP) indicators that ReSAKSS has been tracking since 2008, at continental and regional levels. ReSAKSS was established by the CAADP Partnership Platform, and later endorsed by the African Union Conference of agricultural ministers, to serve as the formal CAADP review and learning platform, charged with tracking 30 core CAADP indicators. The data for the current indicators are published in the ReSAKSS Annual Trends and Outlook Reports (ATORs) and on the ReSAKSS website (www.resakss.org), where they can be accessed in the form of maps and graphs and can be freely downloaded in excel format and used for analysis.

The indicators cover the following five areas: (i) enabling environment (the broader context of the CAADP process and related policies, investments and outcomes); (ii) agricultural spending; (iii) agricultural sector performance; (iv) agricultural trade; and (v) poverty and hunger. The indicators are discussed in four different breakdowns: for Africa as a whole; by the five geographic regions of the African Union (central, eastern, northern, southern, and western); by four economic categories (countries with less favorable agricultural conditions, countries with more favorable agricultural conditions, mineral-rich countries, and middle-income countries); and by the eight regional economic communities (CEN-SAD, COMESA, EAC, ECCAS, ECOWAS, IGAD, SADC, and UMA). For most indicators, the post-CAADP levels (average levels from 2003–2012, or in some cases 2003–2011) are compared with levels of the pre-CAADP base periods, 1990–1995 and 1995–2003. The figures and trends discussed in this Issue Note can be found in the Annex to the ReSAKSS Africawide 2013 ATOR.

Finally, the Issue Note presents the current status of CAADP implementation, indicating the progress of each country with regard to the different stages of implementation. The CAADP stages and related processes and initiatives include: signing a CAADP compact; holding a roundtable; developing a national agriculture and food security investment plan (NAFSIP); holding a business meeting; receiving a grant from the Global Agriculture and Food Security Programme (GAFSP); participating in the New Alliance for Food Security and Nutrition (New Alliance); participating in Grow Africa; establishing a country SAKSS (Strategic Analysis and Knowledge Support System) platform; and undertaking an assessment of the agriculture joint sector review (JSR) process.

Enabling Environment

The key indicators presented in this section include macroeconomic performance (covering GDP growth, inflation, and government debt as a share of GDP), official...
Macroeconomic Performance

Africa’s economy grew at an impressive annual average of 5.2 percent during 2003–2012. This growth, sustained for over 10 years, is remarkably higher than the average growth rate of less than 2 percent in the early 1990s. The recovery that started in the mid-1990s has continued into the 2000s. Regardless of classification, economic growth has taken place across the continent, in all regions and under all economic conditions. The average GDP growth for Africa was 1.6 percent in 1990–1995, more than doubling to 3.9 percent in 1995–2003 and further increasing to 5.2 percent in the 2003–2012 period. At the regional level, the highest GDP growth rate was seen in western Africa, at 7.7 percent during 2003–2012, while the lowest was in southern Africa at 4.4 percent. Among the RECs, the highest growth rate was recorded in ECOWAS at 7.7 percent, and the lowest was UMA at 4.4 percent. It is important to note that the average GDP growth rates across the continent were higher than the average population growth rates, implying that per capita GDP has been rising on the continent. Indeed, per capita GDP has risen across the continent in all geographic regions, across all economic classifications, and in all RECs. Africa as a whole has experienced an annual average increase in per capita GDP of almost 2 percent during 2003–2013. At the continental level, the average level of inflation is just below 10 percent, at 9.8 for 2003–12. However, the eastern and western Africa regions experienced double-digit inflation during this period, at 11.1 percent and 14.5 percent, respectively. The regional inflation differences are reflected in the inflation rates of the RECs, with the highest rates of inflation registered in COMESA and IGAD (in eastern Africa) and ECOWAS (in western Africa). Government debt as a share of GDP has dramatically declined over the last several decades for Africa as a whole, as well as for most regions, economic classifications, and RECs. At the continental level, the share of debt in GDP declined from 95.6 percent in 1990–1995 to 80.8 percent in 1995–2003, and reached a low of 43.4 percent in 2003–2012. Consistent declines were also seen regionally, in central, eastern, and northern Africa, with especially large declines in eastern Africa. Western Africa saw an initial increase in the share of debt in GDP, rising from 64.4 percent in 1990–1995 to 90.6 percent in 1995–2003, before dropping to 36.1 percent in 2003–2012. In southern Africa, the debt share also rose and later declined, but it remained higher in 2003–2012 (at 34.9 percent) than its average level in 1990–1995 (30.7 percent). By economic classification, most categories of countries registered consistently declining debt shares. The mineral-rich countries, however, saw increased debt levels in 1995–2003 compared to 1990–1995, but managed to reduce their debt shares in 2003–2012 to just above the levels of the first period. Each of the RECs had lower average debt shares in 2003–2012 than in 1990–1995. Most RECs saw consistently declining shares, but ECOWAS, and to a lesser extent EAC, initially showed rising shares. Debt shares continued to decline from 2003 to 2012 in every region, economic classification, and REC. Mineral-rich countries, which had an especially high debt share in GDP of 192.5 percent in 2003, have since then reduced their debt share by an average of 17.3 percentage points per year—the most of any region or economic grouping. Africa as a whole has reduced its debt share in GDP by 2.7 percentage points per year from 2003 to 2012.

For Africa as a whole, the share of government revenue in GDP has registered small but consistent increases, from 24.7 percent in 1990–1995 to 25.5 percent in 1995–2003 and to 29.6 percent in 2003–2012. All regions, economic classifications, and RECs also increased their government revenue shares in 2003–2012, compared to the two previous periods. Almost all areas also saw positive annual percentage point changes in the revenue share from 2003 to 2012; only western Africa at the regional level, and ECOWAS and IGAD at the REC level, showed small percentage-point decreases. African countries are increasing revenue collection, and with sustained economic growth they can rely less on foreign borrowing to finance their budgets. This trend is consistent with the reduced debt-to-GDP ratio across the continent. Official Development Assistance

Data on Official Development Assistance (ODA) are not available prior to the 2000s, so this section examines ODA annual average levels and percentage changes during the period 2003-2012. During this period, ODA per capita averaged $39.2 for Africa as a whole, with higher per capita annual average levels registered in 3 regions: central Africa ($52.1), eastern Africa ($42.2), and southern Africa ($45.2). Per capita ODA decreased, between 2003 and 2012, for Africa as a whole, as well as for most regions, economic classifications, and RECs. Only northern Africa, EAC, and UMA experienced increases: UMA witnessed the largest increase of 6.2 percent while the largest decline of 5.9 percent occurred in ECCAS. The share of agricultural ODA in total ODA remained low, averaging 4.2 percent but growing by 6.3 percent for Africa as whole between 2003 and 2012. Although
shares of agricultural ODA in total ODA have remained low, it is reassuring to note that the shares have increased in all regions, economic classifications, and RECs. Shares of above 5 percent were witnessed in western Africa, both in countries with less and more favorable agricultural conditions, EAC, and ECOWAS.

The average share of emergency food aid in total ODA was 4.4 percent in Africa as a whole in 2003–2012, a slight change from 4.0 in 2003. By geographic region, the largest share of food aid in total ODA was registered in eastern Africa (9.8 percent), mainly accounted for by Ethiopia, Somalia, and Sudan. Likewise by economic classification, countries with less favorable agricultural conditions had the largest share of their ODA (7.2 percent) going to food aid. Among the RECs, IGAD stands out, with 14.5 percent of its ODA going to food aid—a reflection of the recent droughts in that region as well as the civil conflicts in several member states, especially Somalia and South Sudan, resulting in large numbers of refugees and displaced persons requiring food aid.

**Agricultural Expenditure**

This section presents two post-CAADP periods, 2003–2008 and 2008–2013, in order to highlight two distinct developments in the evolution of public agricultural expenditure (PAE): significant growth in the first half of the decade followed by stalling or even negative growth in the aftermath of the 2007/2008 food and financial crises. Following the launch of CAADP in 2003, African countries saw rapid growth in PAE. From 2003 to 2008, expenditures increased by an average of 7.7 percent per year, an improvement over the pre-CAADP annual average growth rate of 6.6 percent in 1995–2003. Growth was especially high in the central, southern and western regions, with annual average rates of over 12 percent. However, the pace of growth of agricultural expenditures decreased markedly after the Maputo target date of 2008, which coincided with the onset of the food and financial crises. The continent as a whole saw an annual decrease in the rate of agricultural expenditure of -1.3 percent from 2008 to 2013. The magnitude of this decrease is affected by large drops in Nigeria and Angola, which accounted for a significant share of PAE in Africa in the years following CAADP’s launch. Excluding these two countries, the continent as a whole registered positive but very slow annual growth of PAE of 0.03 percent. The picture that emerges from an examination of trends in the continent excluding Nigeria and Angola is thus one of stagnant PAE growth rather than an absolute decrease in PAE. During the 2008–2013 period, only the central region and one REC, EAC, registered higher PAE growth rates than those of the 2003–2008 period.

Upon closer look, it appears that the global food and financial market crises may have played a role in the drop in agricultural expenditures after 2008. Table 1 shows selected fiscal indicators for African countries in 2003–2008 and 2008–2012. GDP growth was significantly lower in the second period than in the first, growth in ODA fell by half, and previously strong growth in government revenues excluding grants even turned negative. Governments responded to the more difficult financial situation by reducing overall expenditure growth by nearly half in the second period. However, the steeper drop in PAE than in overall public expenditure indicates that agriculture budgets were particularly hard-hit.

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These trends of initial rapid growth in agricultural expenditures followed by stagnation or even decline underline the vital importance of sustaining the momentum of CAADP’s early years into the next decade. In July 2014, African leaders met at the African Union (AU) summit in Malabo, and recommitted to the goal of increasing public agricultural expenditures to reach the 10 percent target. The Malabo recommitment comes at the right time, when the impact of crises may be fading and CAADP contemplates its next ten years.

Despite rapid early growth in PAE, neither the continent as a whole nor any of the regions or RECs met the CAADP goal of devoting 10 percent of total public expenditure to agriculture during the 2003–2008 and 2008–2013 periods (see Figure 1). The continent-wide share of 3.7 percent in 2003–2008 represents a moderate improvement over the 3.2 percent share reached in 1995–2003, but the share decreased to 3.1 percent in 2008–2013, reflecting the declining growth in PAE. Of the geographic regions, eastern and western Africa had the largest shares in both post-CAADP periods, of around 5 to 6 percent. The group of countries with less favorable agricultural conditions exceeded the 10 percent goal in 2003–2008, allocating
Figure 1: Share of Agriculture Expenditure in Total Public Expenditure (%)

Source: ReSAKSS, 2014
Note: CEN-SAD is the Community of Sahel-Saharan States; COMESA is the Common Market for Eastern and Southern Africa; EAC is the East African Community; ECCAS is the Economic Community of Central African States; ECOWAS is the Economic Community of West African States; IGAD is the Intergovernmental Authority for Development; SADC is the Southern African Development Community; and UMA is the Arab Maghreb Union.

Figure 2: Agriculture, Value Added Growth Rate (%)

Source: ReSAKSS, 2014
Note: CEN-SAD is the Community of Sahel-Saharan States; COMESA is the Common Market for Eastern and Southern Africa; EAC is the East African Community; ECCAS is the Economic Community of Central African States; ECOWAS is the Economic Community of West African States; IGAD is the Intergovernmental Authority for Development; SADC is the Southern African Development Community; and UMA is the Arab Maghreb Union.
increased from an average of $478.9 per hectare (in 2005 US$) in 1990–1995 to $574.1 in 1995–2003 and to 756.2 in 2003–2011. Labor productivity increased from $561.9 per worker in 1990–1995 to $618.2 in 1995–2003 and $782.9 in 2003–2012. Almost all areas saw consistent increases in both land and labor productivity, with the exception of countries with less favorable agricultural conditions; in this group, land and labor productivity both decreased in 1995–2003 from the earlier period, and then increased again, although, in the case of land productivity, not enough to reach the levels of 1990–1995. All geographic regions, economic groupings, and RECs registered increasing land and labor productivity since 2003, with the exception of EAC, which saw slightly negative annual average growth rates for labor productivity in the period 2003–2012. Africa’s labor productivity grew at 2.5 percent annually (from 2003 to 2012), while land productivity grew at 3.6 percent annually (from 2003 to 2011).

The shares of PAE in agricultural GDP and in overall GDP were slightly higher in both the 2003–2008 and 2008–2012 periods than in 1995–2003. However, echoing the declining trends seen previously during the crisis years, PAE shares were lower in the second post-CAADP period than in the first. Among the geographic regions, southern Africa had the highest PAE share in agricultural GDP in both 2003–2008 and 2008–2012, while the eastern region had the highest PAE share in total GDP in both periods. For Africa as a whole, PAE shares in agricultural and total GDP in 2008–2012 were 6.1 percent and 0.9 percent, respectively.

**Agricultural Sector Performance**

Agricultural sector growth increased remarkably between 1990–95 and 1995–2003 across the continent, except for mineral-rich countries. Most regions doubled their average rates of growth during this period. For Africa as a whole, the annual average rate of growth of agricultural value added declined from 6.2 percent in 1995–2003 to 5.1 percent in 2003–2012 (see Figure 2). Growth during this period was affected by the severe global food and financial market crises, during which Africa was the only region that managed to maintain a positive growth rate, although it was not able to keep growth at the level of the 6 percent CAADP target. During this period, none of the geographic regions, economic groupings or RECs met the CAADP growth target.

The share of agriculture value-added in total GDP has declined slightly in the last two decades for Africa as a whole, from 17.9 percent in 1990–1995 to 17.2 percent in 1995–2003 and to 15.1 percent in 2003–2010. The GDP share of agriculture also decreased in all geographic regions, economic classifications, and RECs in 2003–2012 compared to the two earlier periods. This declining trend is expected as economies transform and other sectors of the economy, such as services and manufacturing, grow faster and overtake agriculture.

**Labor productivity** (measured as agricultural value added per agricultural worker) and **land productivity** (measured as agricultural value added per hectare of arable land) both increased almost across the board throughout the last two decades. For Africa as a whole, land productivity increased from an average of $478.9 per hectare (in 2005 US$) in 1990–1995 to $574.1 in 1995–2003 and to 756.2 in 2003–2011. Labor productivity increased from $561.9 per worker in 1990–1995 to $618.2 in 1995–2003 and $782.9 in 2003–2012. Almost all areas saw consistent increases in both land and labor productivity, with the exception of countries with less favorable agricultural conditions; in this group, land and labor productivity both decreased in 1995–2003 from the earlier period, and then increased again, although, in the case of land productivity, not enough to reach the levels of 1990–1995. All geographic regions, economic groupings, and RECs registered increasing land and labor productivity since 2003, with the exception of EAC, which saw slightly negative annual average growth rates for labor productivity in the period 2003–2012. Africa’s labor productivity grew at 2.5 percent annually (from 2003 to 2012), while land productivity grew at 3.6 percent annually (from 2003 to 2011).

**Cereal yields**, measured in kilograms per hectare (kg/ha), represent another measure of agricultural productivity that shows consistent increase across Africa, from 1159 kg/ha during 1990–1995 to 1448 kg/ha during the 2003–2012 period. Cereal yields have increased most in eastern and southern Africa and least in northern Africa. However, it is important to note that northern Africa has the highest absolute cereals yield (annual average 2,735 kg/ha in 2003–12) while central Africa, has lowest cereal yield level of 1,033 kg/ha which is less than half the level of productivity realized in northern Africa. Among the RECs, the highest cereal yield in the 2003–12 period was reported for COMESA region, with 1,780 kg/ha, followed by EAC, with 1,627 kg/ha; ECCAS had the lowest cereal yield during the period. Cereal yields have shown improvement between 1990–1995 and 2003–2012 for all economic communities. These variations across the continent indicate that there is still great potential to double or even triple cereal yields in most parts of Africa.

Reflecting the increase in agricultural productivity in Africa, the **agricultural production index** has been growing at an annual average rate of 3.2 percent during period 2003–2012. The index measures overall agricultural production, using 2004–2006 as the base period; index values above 100 indicate production levels greater than those of 2004–2006. For the 2003–2012 period, the average level of the index is above 100 for all regions, economic groups, and RECs. The southern Africa region had the highest annual average, with a value of 116.5, followed by the eastern region with a value of 110.6. Not surprisingly, the group of countries with more favorable agricultural conditions had the highest average annual value (112); among the RECs, the annual average agricultural production index level ranged from a minimum of 102 in ECOWAS to a maximum...
of 113 in the SADC region. The highest annual average change in the index over the same period occurred in ECCAS region, followed by the SADC region.

Fertilizer use in African agriculture remains low, at an average of 22 kg/ha. Since the mid-1990s, the rate of fertilizer use has not increased significantly, rising from 20.3 kg/ha in 1995–2003 to 22.4 kg/ha in 2003–2012. This is less than half of the target set at the fertilizer summit in Abuja to increase fertilizer use to 50 kg/ha by 2015. The only region that surpasses this target is the northern region, where the average rate of fertilizer use was 103 kg/ha during 2003–2012; this contributes to the higher cereal yields observed in this region. The trend in fertilizer use is rising in many RECs, except in ECCAS, SADC, and UMA.

Agricultural Trade

During the 2003–2011 period, the ratio of total agricultural exports to total agricultural imports was 0.6 for Africa as a whole, and in all geographic regions it was less than one, indicating that the value of agricultural imports exceeded the value of exports across the continent. The exceptions were the group of countries with more favorable economic conditions, as well as EAC and IGAD. In every region except northern Africa, the ratio of exports to imports was lower in 2003–2011 than in the earlier periods (1990–1995 and 1995–2003). This is expected as agricultural imports have grown much faster than exports in absolute terms. From 2003 to 2011 the ratio showed a decline, with negative annual average percentage change in all regions, all RECs, and all economic classifications except mineral-rich countries.

Agricultural imports have increased throughout the continent, with annual average import levels in 2003–2011 higher than those of 1990–1995 for every region, economic classification, and REC. Imports also continued to grow during the 2003–2011 period, with positive annual growth rates in every area except the group of countries with less favorable agricultural conditions. During this period, the average level of per capita agricultural imports was much higher in northern Africa than in any other region, at $99.5. Import levels were lowest in central and eastern Africa, both at $18.4.

The historical trends are less clearly defined for per capita agricultural exports. Africa as a whole showed small increases between each period, with rising exports in some regions and decreases in others. During the 2003–2011 period, per capita exports were growing in Africa as a whole and in the eastern, northern and southern regions, but decreasing in western and central Africa. The drop in the level of exports was most defined in countries with less favorable agricultural conditions, which saw per capita exports decrease by an annual average of 9.8 percent in 2003–2011. Even where exports were rising, they grew more slowly than imports in all areas except northern Africa.

Reflecting the moderately declining shares of agriculture in GDP, the share of agricultural trade in merchandise trade is also decreasing. Between 1990–1995 and 2003–2011, agricultural raw materials (imports and exports) decreased as shares of total merchandise imports and exports in Africa as a whole as well as in all geographic regions. Also, during the 2003–2011 period, Africa’s agricultural export share continued to decrease while its import share increased slightly, at an average annual rate of 0.4 percent.

Poverty and Hunger

In Africa as a whole, the headcount poverty rate, at the international poverty line of $1.25/day, has dropped moderately but consistently, from 46.7 percent in 1990–1995 to 44.4 percent in 1995–2003 and to 41 percent in 2003–2012. All regions, economic classifications, and RECs showed the same consistent reduction in poverty. However, poverty levels remain quite high, except in northern Africa. In all areas, 2003–2012 poverty levels remain much greater than 50 percent of the 1990–1995 levels, reflecting insufficient progress toward meeting the MDG target of halving 1990 poverty levels by 2015. However, poverty reduction appears to be accelerating. The average annual percentage reduction in poverty during the 2003–2012 period was greater than the annual average reduction during 1995–2003 for Africa as a whole and for all regions except western Africa. Poverty rates according to national poverty lines show very similar trends, although by this measure, poverty has increased slightly in northern Africa, from 18.4 percent in 1990–1995 to 18.7 percent in 2003–2012.

Measures of hunger and malnutrition show similar trends of regular though disappointingly slow improvement. The prevalence of weight-for-age child malnutrition declined from 24.7 percent in 1990–1995 to 20.9 percent in 2003–2012 for Africa as a whole; all areas saw similar declines, except for the group of countries with less favorable agricultural conditions, where child malnutrition prevalence rose slightly from 30.8 percent in 1990–1995 to 31.3 percent in 2003–2012. The prevalence of undernourishment in the entire population declined in all areas between 1990–1995 and 2003–2012. In the latter period, it reached 20.6 percent for Africa as a whole.
Progress in reducing under-five child mortality was somewhat stronger. Between 1990–1995 and 2003–2012, the continent as a whole reduced child mortality rates by about one-third, from 149.8 per 1,000 to 100.4. During the 2003–2012 period, the continent’s child rate decreased by an average of 4 percent per year, with every area showing annual average reductions of at least 2 percent, and as much as a 5.5 percent reduction in eastern Africa.

These trends are summarized in the Global Hunger Index, a measure calculated yearly by IFPRI that combines data on child malnutrition, child mortality, and overall undernourishment (see von Grebmer et al., 2013, for more information). Higher numbers of the Index indicate higher levels of hunger and child mortality. Here again, for the continent as a whole and for all regions, economic categories and RECs, the Index shows consistent improvement throughout the past two decades, with continued declines during 2003–2012.

Progress in the CAADP Implementation Process

As of March 2014, 33 countries had signed CAADP compacts, and of these, 25 had developed NAFSIPs to operationalize the commitments in the compacts. Momentum toward signing CAADP compacts did not pick up until 2009, two years after the first compact was signed by Rwanda in 2007. Since 2009, the fast pace of signing CAADP compacts and developing NAFSIPs reflects the commitments of African Heads of State and Government to implementing CAADP as the framework for developing agriculture to improve food and nutrition security, create employment, reduce poverty, and achieve resilience for vulnerable communities and ecosystems. Following the signing of the compact and the development of a NAFSIP, each country holds a business meeting to discuss, among other things, the financing of the plan. The government leads the process by presenting its priorities in the NAFSIP, its own resources to finance the plan, and the financing gap that needs to be filled. Twenty-two countries had held business meetings by March 2014.

In order to support countries to finance the gaps in their NAFSIPs and achieve targeted outcomes, GAFSP was created in 2010, and 15 countries in Africa have been approved for grants totaling over $563 million. In addition to GAFSP, there have been other CAADP-supporting initiatives aimed at improving the pace and quality of implementation at the country level. The New Alliance is one; ten African countries have launched New Alliance cooperation agreements that indicate commitments by various partners, including government, the private sector, and donors. Another is Grow Africa, which arose from the World Economic Forum to attract and support private sector investment in Africa’s agriculture; seven countries are participating in that initiative.

Even after countries have signed CAADP compacts and developed NAFSIPs, they still must address questions around implementation. Countries need to track and report implementation progress to their stakeholders. Yet, in several governments, capacity for analysis and monitoring and evaluation (M&E) is weak. To fill this gap, ReSAKSS has been working to support countries to establish country SAKSS platforms that are aimed at improving policy analysis, review, and dialogue in order to improve the quality of NAFSIP implementation. Already, 6 platforms have been established and an additional 6 will soon be established, taking the total number of country platforms to 12 by the end of 2014.

One of the principles of CAADP is strong partnerships, including mutual accountability. African countries are increasing efforts to strengthen partnerships and promote evidence-based policy planning and implementation, including through review, dialogue, benchmarking and mutual accountability. One key element in efforts to enhance mutual accountability is to strengthen review processes by establishing robust and technically sound agricultural JSRs. JSRs provide an inclusive, evidence-based platform for multiple stakeholders to review progress together, hold each other accountable for commitments, and agree on future plans of action. In early 2014, the African Union Commission (AUC) and the NEPAD Planning and Coordinating Agency (NPCA) initiated a process of assessing the status of JSRs in seven countries. The assessments were completed in July 2014, and the process will be expanded to more countries in the coming years. In supporting the countries, AUC and NPCA were supported by the International Food Policy Research Institute (IFPRI) and ReSAKSS, as well as the United States Agency for International Development (USAID) Africa Lead II program. This partnership is expected to continue and strengthen for the next set of countries. Recognizing the importance of continued efforts to improve review and dialogue, African Heads of State and Government renewed their commitment to strong review and mutual accountability processes at the June 2014 Malabo summit.