



Report of the SADC Executive Secretary

Overview of the RISDP 2020-2023 Interventions and Assessment of Intermediate Outcomes

August 2024



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2024

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PREFACE

Every year, I have the privilege of presenting this flagship report to the SADC leadership, Member States and other stakeholders to summarise the region's regional integration and cooperation progress. Reporting on the progress of SADC and its institutions on regional integration and cooperation is not only an integral part of my mandate. Still, it is also an opportunity for all of us to remain seized with changing the lives of the citizens.

This report is a medium through which we celebrate our collective successes and stimulate dialogue on the most pressing issues affecting SADC's move towards a shared future. It succinctly demonstrates that we are progressing under the various pillars of the Regional Indicative Strategic Development Plan (RISDP) 2020-2030, despite the challenges the Member States collectively grapple with to bring about peace, security and socioeconomic development through integration and cooperation. The SADC region continues to pride itself on relative peace and stability, thanks to the Member States' unwavering commitment and the significant financial resources they provide to support the programmes.



We continue to make good progress in peace and security, infrastructure, and socioeconomic development. However, our progress towards regional integration is significantly affected by external factors, including the effects of droughts, the COVID-19 pandemic, and the wars in Ukraine and the Middle East. We have no choice but to find sustainable homegrown solutions to keep the region on track towards achieving its development objectives.

I invite the region's leadership and policymakers to provide the much-needed guidance on the SADC we want, embracing the global, continental and regional opportunities and challenges. This region boasts abundant human capital in all aspects of regional integration. I, therefore, call on the think tanks, implementing sectors, non-state actors, development partners and SADC citizens to work with the Secretariat to mobilise resources and implement interventions that will expedite action in the final years of RISDP.

As the Secretariat celebrates the second year of adopting the Balanced Scorecard System, let us continue to write our success story with results we can look back on and be proud of.

I count on the collaboration between the Secretariat, the Member States, the ICPs and other stakeholders. The region's challenges outlined in this report require bold policy reforms, enhanced resource mobilisation, and impactful cooperation and strategic partnerships. Only through our collective responsibility, commitment, and people-centred actions can we expedite the move towards the future we want for our region and its citizens, espoused in Vision 2050.

A handwritten signature in blue ink, consisting of stylized initials and a surname, positioned above the printed name of the Executive Secretary.

H.E Elias M. Magosi
SADC Executive Secretary

ABBREVIATIONS & ACRONYMS

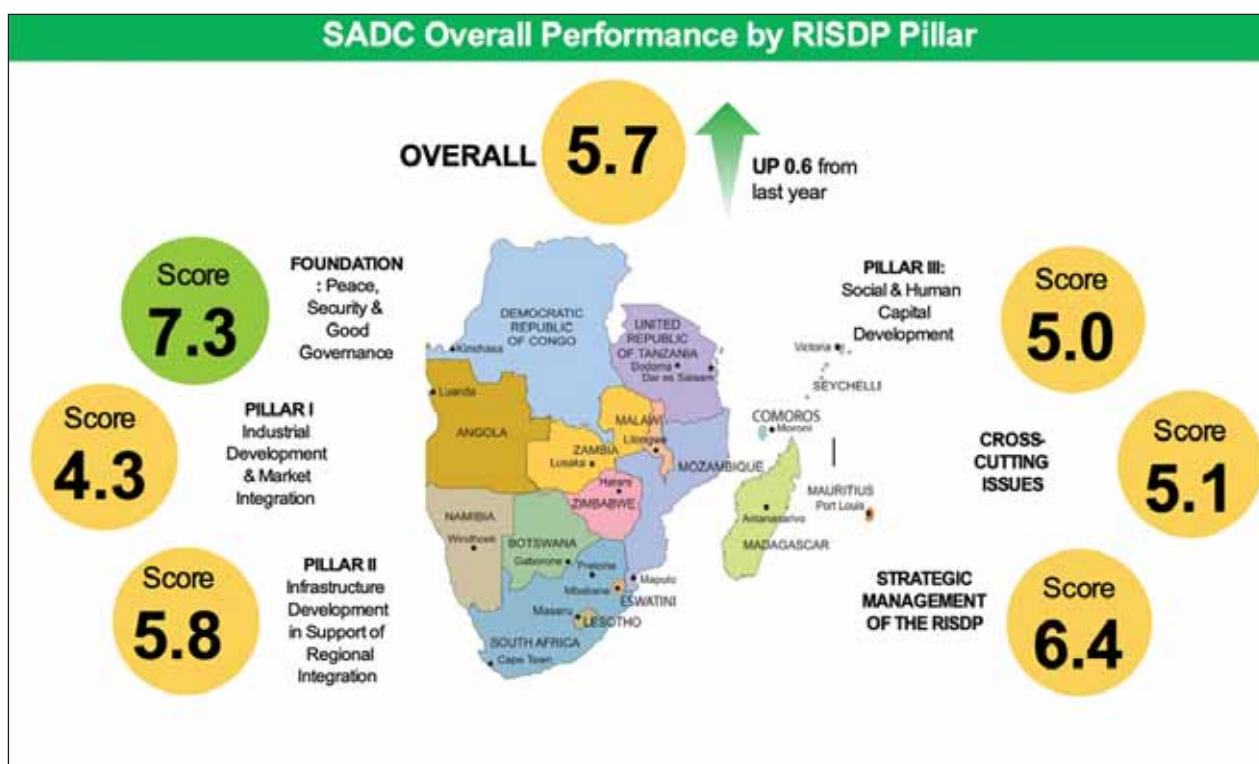
Acronym	Definition
AfCFTA	African Continental Free Trade Area
AfDB	African Development Bank
AUC	African Union Commission
AWS	Automatic Weather Station
BADEA	Arab Bank for Economic Development in Africa
COMESA	Common Market for Eastern and Southern Africa
CTMS	Corridor Trip Monitoring System
DFI	Development Finance Institution
EAC	East African Community
ECCAS	Economic Community of Central African States
ECOWAS	Economic Community of West African States
EU	European Union
FAO	Food and Agriculture Organization
FDI	Foreign Direct Investment
FTA	Free Trade Area
GBV	Gender-Based Violence
GCCA+	Global Climate Change Alliance Plus
GDP	Gross Domestic Product
GERD	Gross Domestic Expenditure on Research and Development
HIV	Human Immunodeficiency Virus
ICP	International Cooperating Partner
ILO	International Labour Organization
IUU	Illegal, Unreported and Unregulated
IXP	Internet Exchange Point
LEAP	Law Enforcement and Anti-Poaching
LPG	Liquefied Petroleum Gas
MVA	Manufacturing Value Added
NCOF	National Climate Outlook Forum
NGO	Non-Governmental Organization
NSA	Non-State Actor
ODeL	Open, Distance and eLearning
OSBP	One-Stop Border Post
PIDA	Programme for Infrastructure Development in Africa
PMTCT	Prevention of Mother-to-Child Transmission
PPP	Public-Private Partnership
RBO	River Basin Organisation
RCTC	Regional Counter-Terrorism Centre
RDF	Regional Development Fund
REC	Regional Economic Community
RIDMP	Revised Regional Infrastructure Development Master Plan
RIP	Regional Irrigation Policy
RIP	Regional Irrigation Policy
RLAH	Roam Like at Home
RPTC	Regional Peacekeeping Training Centre
RRN	Regional Railway Network
RTGS	Real-Time Gross Settlement
SACU	Southern African Customs Union
SADCAT	SADC Administrative Tribunal
SAMIDRC	SADC Mission in the DRC
SAMIM	SADC Mission in Mozambique
SEOM	SADC Election Observation Mission
SGR	Standard Gauge Railway
SNC	SADC National Committee
SPGRC	SADC Plant Genetic Resources Centre
SUT	SADC University of Transformation
TB	Tuberculosis
TFCA	Trans-Frontier Conservation Area
TFTA	Tripartite Free Trade Area
WHO	World Health Organisation

EXECUTIVE SUMMARY

SADC aims to promote sustainable and equitable economic and socioeconomic development that will ensure poverty alleviation, enhance the standard and quality of life of the people of Southern Africa and support the socially disadvantaged through Regional Integration. This objective is outlined in the RISDP 2020-2030 under the pillars of Peace, Security and Good Governance, Industrial Development and Market Integration, Infrastructure Development, Social and Human Development, Cross-Cutting Areas of Gender Youth, Environment and Climate Change, and Disaster Risk Management and Strategic Management of the RISDP 2020-2030. The Secretariat works closely with Member States as key stakeholders and drivers of regional integration through nationally defined strategies and plans.

This report presents high-level progress towards achieving selected outcomes and key performance indicators

SADC recorded a **moderate performance** score of 5.7 points out of 10 under the RISDP pillars in 2023/24, down from a 6.1 score achieved in 2022/23. This performance is attributable to the continued effects of COVID-19, climate shocks (including the El-Nino and droughts) and the ongoing Russia-Ukraine war. The moderate score reflects both progress and persistent challenges across various sectors. The Foundation pillar of Peace, Security, and Good Governance emerged as the best-performing area with a score of 7.3, demonstrating the region's commitment to maintaining stability and strengthening democratic processes. Conversely, Pillar I: Industrial Development and Market Integration recorded the lowest score of 4.3, indicating significant room for improvement in areas such as manufacturing value addition, intra-regional trade, and foreign direct investment. This disparity in performance across pillars underscores the need for targeted interventions and resource allocation to achieve a more balanced and comprehensive regional integration.



Foundation: Peace, Security and Good Governance

A consistently good score of 7.3 was achieved to enhance peace, security, and good governance. The region made notable strides towards consolidating democracy through the deployment of SADC Electoral Observer Missions (SEOMS) and the peaceful conduct of elections. Good progress was also made towards safeguarding peace and security through the deployments of the SADC Standby Force in the Democratic Republic of Congo and Mozambique. The recovery of illicit assets and women's participation and leadership in peace and security also improved. However, more effort is required to find lasting peace in conflict areas and address the significant rise in cross-border criminal activities.

Pillar I: Industrial Development and Market Integration

SADC achieved a moderate score of 4.3 under Pillar I. Manufacturing value added (MVA) as a percentage of GDP remains on a downward trajectory. The same applies to manufacturing employment, intra-SADC trade and Foreign Direct Investment.

Progress towards regional integration continues to be affected by several factors. While the global economy showed some resilience, global inflation declined and is forecast to continue the downward trend. Public debt increased, fiscal deficits widened, and commodity prices subsided. The continental and SADC region's economic growth mimicked these trends. Of specific note for SADC is the significantly high public debt, worsening current account deficit and declining foreign reserves. Most Member States have not met the targets for inflation, public deficit, fiscal deficit, and real GDP growth, albeit some progress is anticipated in 2024.

On a positive note, extra-regional trade increased, and financial inclusion reached an impressive 77% in 2023, while the transactions settled via the Real-Time Gross Settlement (RTGS) system doubled since 2019. Tourism recovered in 2023 due to the significant increase in non-Member State resident tourists. SADC's efforts to improve air traffic further contribute to the ongoing recovery, putting the region towards the target of 25.5 million by 2030.

SADC's performance in the agricultural sector is mixed, with only a modest increase in crop production, particularly cereal and livestock production. However, widespread crop failure has occurred due to the effects of El Nino and worsening food insecurity compared to the previous year. These developments mean that serious interventions are required for SADC to transform the agricultural sector.

Pillar II: Infrastructure in Support of Regional Integration

Infrastructure development recorded a good score of 5.8 compared to 2022/23. Overall, significant progress has been made towards digitally connecting the region via broadband and mobile connectivity. Thirteen Member States achieved the 2025 SADC Broadband Target to cover 80% of their population with broadband services and Regional Broadband interconnectivity. Average mobile penetration is high at 91%, while average internet penetration is moderate at 54%. Over half of the Member States have also migrated from analogue to Digital Terrestrial Television (DTT).

Progress on water and sanitation is mixed, with more significant improvements in access to water than sanitation. More progress is underway to increase access to water in the region through specific water projects. Member States need to focus on improving water storage in the region.

The Regional Road Network Infrastructure is relatively robust. Progress is being made towards signing corridor agreements to expand, upgrade and modernise the region's critical road infrastructure networks. Four One-Stop Border Posts (OSBPs) (Chirundu, Kazungula, Mwami/Mchinji, Nakonde/Tunduma, Dedza/Colomue) have been established for some of the priority regional transport corridors. More work is required to improve the roads' overall condition and progress under the rail and ports sectors.

Critical regional power projects are underway, and corridor projects are either in the pipeline or at various stages of implementation. However, there are significant challenges in the energy sector, with a growing capacity deficit, low access to electricity, low electricity trade volume and a share of renewable energy at 38%. Coal is the primary fuel source at 59% of the energy mix, followed by hydropower at 24% and a minor contribution from other renewable sources. In 2023, the region commissioned 1,261 MW but experienced a capacity shortfall of 8,441 MW. However, the situation improved in some parts of the region in the first four (4) months of 2024. The deficit was reduced to 3,681 MW by the end of April 2024 since several thermal power plants are fully operational, especially in South Africa.

Pillar III: Human and Social Capital Development

The region has recorded a moderate score of 4.5 under this pillar, with progress made in the fight against Malaria and Tuberculosis (TB). While TB incidence has declined, the region still registers high numbers of TB deaths annually. Similarly, Malaria remains high in several high-burden countries. Meanwhile, the region experienced multi-country Cholera outbreaks that spread since early 2023.

Nutrition also remains a significant issue, with a high prevalence of anaemia among women, stunting in children under five and rising rates of overweight and obesity in young children. On a positive note, progress has been made in increasing exclusive breastfeeding rates.

Unemployment varies greatly across Member States, from 0.9% to 31.4% in 2023. More concerning is that industrial employment is stagnant at just 12%, far below the regional target of 40% by 2030. Child labour also persists as a critical challenge for the region.

Cross-Cutting Issues

With a 5.1% score, moderate progress has been made under cross-cutting issues, with some areas demonstrating a positive trajectory despite the challenges of the post-COVID-19 period.

Gender Equality: Overall progress in gender parity is fair. Namibia and South Africa have maintained high gender parity in the Executive, reaching the 50% target of women's representation. However, no Member State reached 50% of women's representation in parliament. Gender-based violence (GBV) remains a significant concern in the region, with females more disproportionately affected than males in the reported GBV cases in 2023.

Natural Resource Management: Forest cover increased and is approaching the 2030 target. The number of threatened animal species decreased. Twelve out of 16 targeted Trans-Frontier Conservation Areas (TFCAs) are now operational, while fish-catch and aquaculture production saw a more than 50% increase between 2019 and 2023.

HIV/AIDS: HIV prevalence gradually reduced with Botswana, Eswatini, Tanzania and Zimbabwe achieving the 95-95-95 HIV treatment targets. Namibia became the first high-burden Member State to make significant progress towards eliminating vertical HIV/Hepatitis B transmission.

Strategic Management of the RISDP 2020-2030

A score of 6.4 has been recorded under Strategic Management. US\$185 million was mobilised in 2023/24, representing an 81% increase compared to US\$35 million in 2022/23. The resources required to implement the regional integration agenda exceed those mobilised annually. Member States are to seriously consider more options outlined in the resource mobilisation framework to mobilise resources. In addition, the SADC Regional Development Fund (RDF) is to be urgently operationalised.

As of 2023, the region had developed 58 protocols. Many of these protocols and other Legal Instruments have entered into force. Out of a total of 58 protocols, 35 are in force, while 23 are not in force. The Member States require a concerted effort to sign and ratify the protocols for them to enter into force.

The Secretariat maintained a very good performance regarding resource administration per the SADC Financial Regulations. So far, the region has not met the human resource requirements defined in the Secretariat's organisational structure, which directly affects the delivery of regional priorities. The employee retention rate was generally high, peaking at 89% in 2024. Employee turnover increased in 2022 but decreased in 2023.

Progress on Continental Integration

SADC is the current chair of the Tripartite Free Trade Area (TFTA), with 11 Member/Partner States having ratified the Agreement. The Secretariat is actively engaging other Member States to ratify the Agreement so that it can enter into force. Meanwhile, 15 SADC Member States have ratified the AfCFTA Agreement to create a single market for goods and services, facilitating the free movement of businesspersons and investments across the continent. The Secretariat is diligently engaging Madagascar (the remaining SADC Member State) to ratify the Agreement.

SADC will continue to be negatively affected by low economic growth and poor performance of other macroeconomic indicators, which are a result of the long-term effects of COVID-19, climate change effects, and geopolitical tensions in Ukraine and the Middle East. However, the region made moderate progress in implementing the RISDP 2020-2030 in 2023/24, although this performance is lower than that of the previous year.

Overall, Member States have continued to demonstrate commitment to implementing the RISDP 2020-2030, even in the face of the impact of socioeconomic and geopolitical challenges of the past four years. There is potential to remain on track and deliver the results in the final six years of the RISDP.

Challenges and Recommendations

Despite notable progress, the SADC region continues to face significant socio-economic challenges that impede its development and regional integration efforts. These challenges, along with recommended actions, are summarised below:

Economic Challenges: The region grapples with low economic growth, poor macroeconomic performance, and high public debt levels. Intra-regional trade remains low at 18.3% of total trade, while the manufacturing sector has stagnated with MVA at 11.2% of GDP.

Food insecurity has worsened, increasing from 15% to 18% of the population. It is recommended that Member States implement measures to boost intra-regional trade, advance the manufacturing sector, address trade imbalances, improve macroeconomic convergence, and develop comprehensive food security strategies.

Infrastructure Deficits: Access to electricity remains low at 56% against the 85% target, with a significant energy capacity shortfall of 8,441 MW. The share of renewable energy is only 38% against an 80% target, and water and sanitation infrastructure is inadequate in many areas. To address this challenge, the region should address factors affecting low operating capacity in the energy sector, diversify the energy mix, increase renewable energy share, improve access to water and sanitation, and accelerate the development of regional infrastructure projects.

Social and Health Issues: The region faces a resurgence of cholera outbreaks, high prevalence of HIV/AIDS, TB, and malaria, persistent nutrition challenges, and high youth unemployment at 12.5%. Child labour remains a significant problem in several Member States. It is recommended that SADC implement measures to prevent cholera resurgence, reduce prevalence and deaths from communicable diseases, address nutrition challenges, and develop strategies to tackle youth unemployment and child labor.

Peace and Security: Ongoing conflicts in DRC and Mozambique, rising cross-border criminal activities, and slow deployment of the SADC Standby Force continue to challenge regional stability. Member States should intensify efforts to find lasting peace in conflict areas, address cross-border crime, and improve the response time for SADC Standby Force deployment.

Gender Inequality: No Member State has achieved 50% women's representation in parliament, and gender-based violence remains a major concern across the region. To make further progress, SADC should promote measures to improve women's representation in leadership and decision-making positions and enhance mechanisms for reporting and prosecuting gender-based violence cases.

Climate Change and Disasters: The region is experiencing an increasing frequency and severity of climate-related disasters, including El Niño-induced droughts affecting multiple countries. SADC should implement robust climate change interventions and enhance regional disaster response mechanisms.

Resource Mobilisation: A significant resource gap exists for implementing regional programmes, necessitating innovative financing solutions. In this regard, the region should explore innovative financing mechanisms and operationalise the SADC Regional Development Fund to address the resource gap.

Implementation Challenges: Slow ratification of key protocols and agreements, along with inconsistent performance across Member States in various areas, hinders regional integration efforts. Member States should accelerate the ratification of key protocols and agreements and strive for more consistent performance in implementing regional initiatives.

Addressing these challenges will be crucial for SADC to achieve its development goals and fully realise the potential of regional integration. Despite these obstacles, the region has demonstrated commitment to implementing the RISDP 2020-2030, even in the face of recent socioeconomic and geopolitical challenges. With continued focus and cooperation, SADC has the potential to overcome these hurdles and deliver on its objectives in the final six years of the current RISDP.



1 INTRODUCTION



SADC is in the fourth year of implementing the RISDP 2020-2030, a comprehensive SADC regional integration framework with concrete steps and milestones to be achieved in the journey towards the SADC Vision 2050. The RISDP is divided into the following pillars: Foundation: Peace, Security and Good Governance; **Pillar I:** Industrial Development and Market Integration; **Pillar II:** Infrastructure in Support of Regional Integration; **Pillar III:** Social and Human Capital Development; **Cross-cutting Issues** (Gender, Youth, Environment and Climate Change, and Disaster Risk Management); and **Strategic Management** of RISDP 2020-30.

Article 6 of the SADC Treaty commits Member States to adopt measures to promote the achievement of the objectives of SADC while Article 15 (h) mandates the Executive Secretary to monitor SADC's progress on regional integration and submit annual reports to Council on the activities of SADC and its institutions.

This report, therefore, provides an overview of the region's performance in the abovementioned areas of the RISDP in 2023/24. It uses selected outcomes and indicators to highlight significant achievements and challenges encountered by Member States in collaboratively pursuing deeper regional integration and sustainable development. In addition, it outlines progress on the following:

- The signing, ratification and domestication of SADC legal instruments, including the protocols;
- SADC's performance as part of the Agenda 2063, the African Continental Free Trade Area (AfCFTA) and the COMESA-EAC-SADC Tripartite Free Trade Area;
- The region's efforts towards resource mobilisation; and
- The implementation of the SADC Theme for 2023/24 entitled ***"Human and Financial Capital: The Key Drivers for Sustainable Industrialisation in the SADC Region"*** launched and led by the SADC Chairperson – H.E. President João Manuel Gonçalves Lourenço, President of the Republic of Angola.

Key messages, infographics (such as charts, maps and tables) and short summaries have been used to illustrate progress per the RISDP pillar.

2 METHODOLOGY

2.1 Data Analysis and Interpretation

The Balanced Scorecard was used to analyse and interpret the data and information. Dashboards were used to present the results in the form of 'performance speedometers', graphs, bar charts, tables, and maps. In some cases, graphs, charts, and pictures were generated to improve the pictorial presentation of the messages.

The Report shows the Region's overall performance across all Pillars of the RISDP 2020/2030. It then provides the overall score per Pillar based on all selected KPIs of each Pillar scored out of 10.

At times, the scores are absolute values depicting progress made in the 2023/24 Financial Year compared to the previous year(s). In the few cases where the 2023/24 data were unavailable, the 2021/22 and 2022/23 data were used. The performance is also presented as dashboards showing actual values vis-à-vis the targets. The dashboards feature the following three colour bands:

- **Red** – for scores between 0% and 40% and denoting poor performance;
- **Orange** – for scores between 41% and 69%, signifying moderate to good performance; and
- **Green** – for scores above 70% and indicating good performance.

The analysis in the Report assumes that each Pillar and KPI carries the same weight as consultation, and rigorous analysis of Pillar and KPI weighting was not conducted. The analysis assumes that all KPIs and activities are implemented concurrently and within the same timeframe. These assumptions were made considering that the Balanced Scorecard System was used for the first time to analyse the Executive Secretary's report and that the planning process was not based on the Balanced Scorecard approach.

2.2 Limitations and Caveats of the Methodology

The performance scores computed by the Balanced Scorecard System are based on data availability on the selected KPIs. The scores also reflect the overall performance of all the KPIs per Pillar. Where no data have been provided on the selected KPIs, the System considers this zero-performance, affecting the overall performance of the Pillar. In this regard, data gaps may result in scores that paint an inaccurate picture of progress made and the actual performance of the Pillar.

As previously stated, the analysis assumes that all the Pillars and KPIs have the same weight and are implemented concurrently. This provided an overall picture as the performance is generalised across Pillars and KPIs. Some indicators do not apply to some countries, so the computations exclude such exceptional cases.

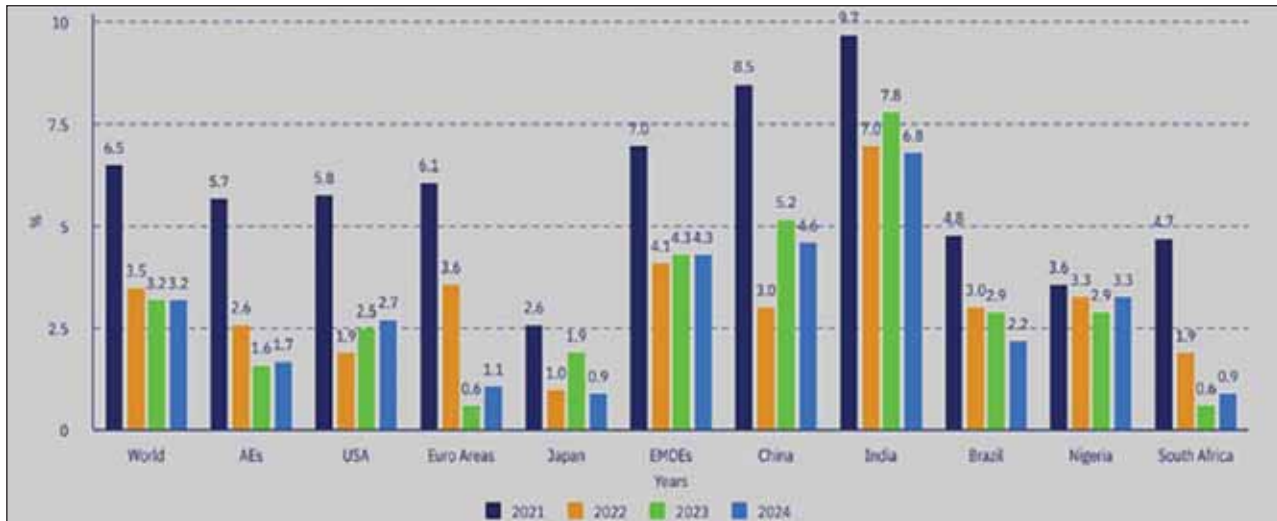
Each country's performance is an assessment of progress made from the base value to the actual value in 2021 vis-à-vis the expected value in 2021. Thus, each country's assessment is made against its own expected level of achievement of the respective targets as deduced from the 2023 target. In this way, comparisons across countries and regions indicate the performance as deduced from the relative levels of change made towards their respective expected 2021 values and are not the absolute values of their development status.

3 SITUATIONAL ANALYSIS

3.1 Global Economic Context

The global economy showed resilience in 2023, with growth slowing slightly from 3.5% in 2022 to 3.2%. This slowdown was due to post-pandemic supply-chain disruptions, the Russia-Ukraine conflict, inflation, and synchronised monetary policy tightening. Growth was mainly supported by Emerging and Developing Asia and Europe. Projections indicate global growth will remain fragile at 3.2%, impacted by pandemic effects, high interest rates, reduced fiscal stimuli, climate change, geopolitical tensions, and the ongoing Russia-Ukraine conflict. (See Figure 1).

Figure 1: Global Economic Growth in Selected Areas



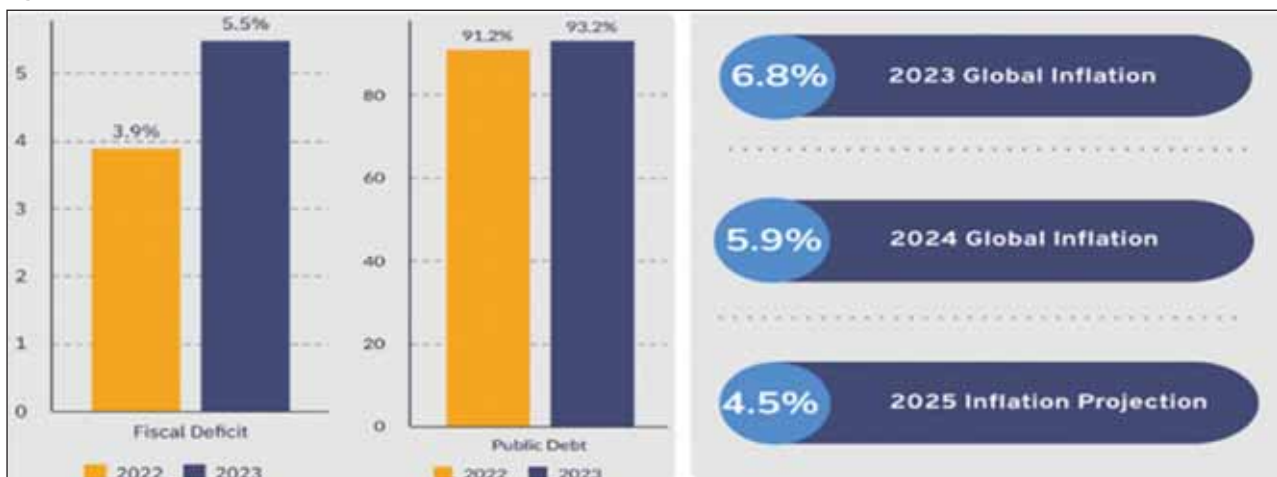
Source: IMF World Economic Outlook, April 2024. AEs = Advanced Economies, EMDEs = Emerging Markets and Developing Economies * Denotes projections

The global economic outlook remains fragile, with growth projected to remain at 3.2% in 2024 due to long-term pandemic effects, high interest rates, withdrawal of fiscal stimuli, climate change impacts, and ongoing geopolitical tensions.

3.1.1 Global Fiscal and Monetary Trends

Global public debt increased above pre-pandemic levels due to widened fiscal deficits, with low-income countries and emerging markets facing higher debt distress risks. In 2023, global fiscal deficits averaged 5.5% of GDP, and public debt rose to 93.2%, driven by high expenditures and decreased revenues. Government spending remained elevated due to pandemic measures and new fiscal stimuli. The risk of worsening fiscal positions in 2024 is high due to numerous elections and potential geopolitical and natural disaster pressures, reflecting a "political budget cycle." Global inflation decreased from 8.7% in 2022 to 6.8% in 2023, driven by lower energy and food prices and synchronised monetary policy tightening. Inflation is forecasted to continue declining to 5.9% in 2024 and 4.5% in 2025, with advanced economies reaching targets sooner than emerging and developing economies (see Figure 2).

Figure 2: Fiscal Deficit, Public Deficit and Global Inflation

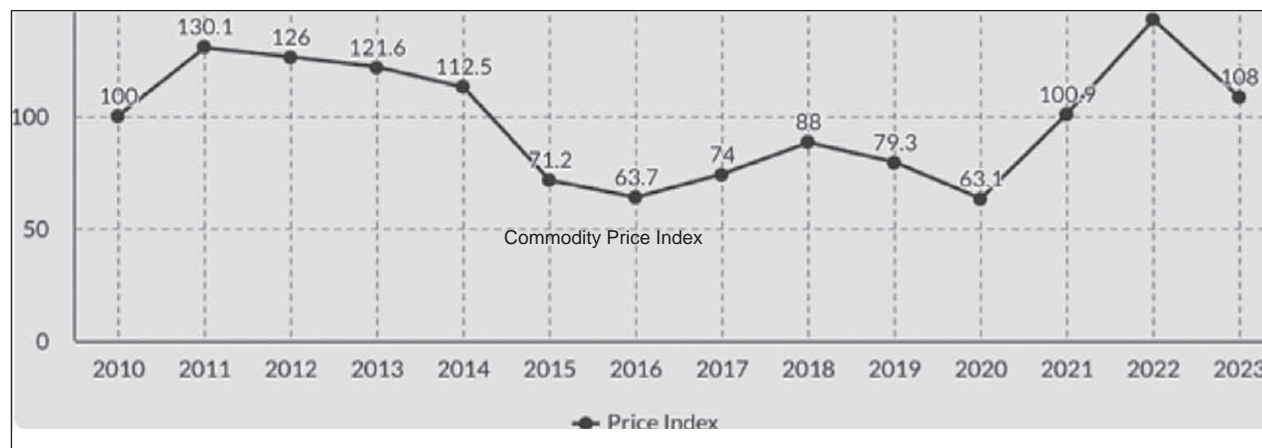


Source: IMF World Economic Outlook, April 2024

3.1.2 Global Commodity Prices

In 2023, commodity prices subsided after peaking in 2022 due to the Russia-Ukraine conflict. Heightened geopolitical tensions influenced this decline, China's weaker-than-expected economic recovery, global monetary tightening, a stronger US dollar, increased supply of oil and gas, and good harvests. The World Bank Commodity Price Index dropped by 24.22%, from 142.52 points in 2022 to 108.00 points in 2023, driven by weaker prices for all commodities except precious metals (gold, platinum, and silver), as shown in Figure 3.

Figure 3: Commodity Price Index

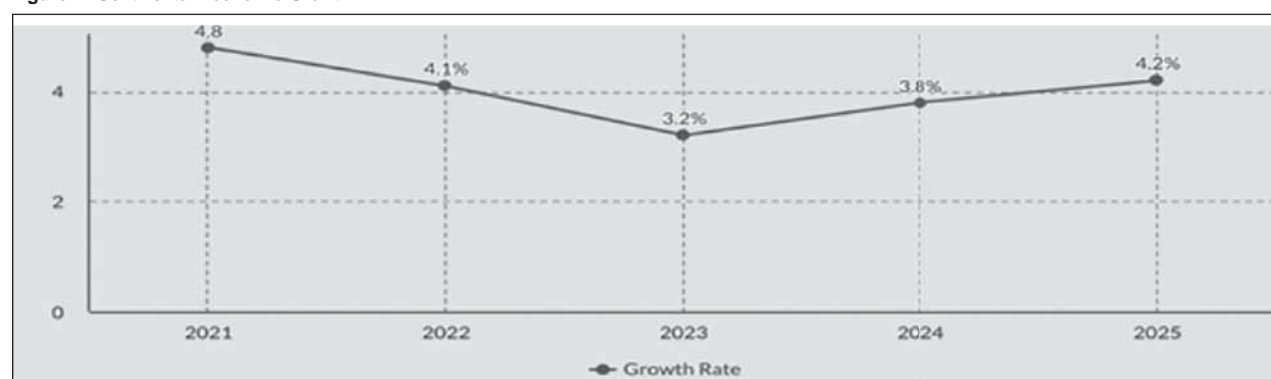


Source: World Bank Commodity Price Data (The Pink Sheet), 2024

3.2 Continental Economic Trends

Africa's economic growth has slowed due to rising living costs, climate change, health pandemics, and geopolitical tensions. Average real GDP growth declined to 3.2% in 2023 from 4.1% in 2022, affected by undiversified economies, multiple shocks, and high inflation. However, growth is projected to rise to 3.8% in 2024 and 4.2% in 2025. Despite these challenges, Africa remains the second-fastest growing region after Asia, with growth exceeding the global average of 3% in 2023 and is expected to have 11 of the world's 20 fastest-growing economies in 2024 (see Figure 4).

Figure 4: Continental Economic Growth

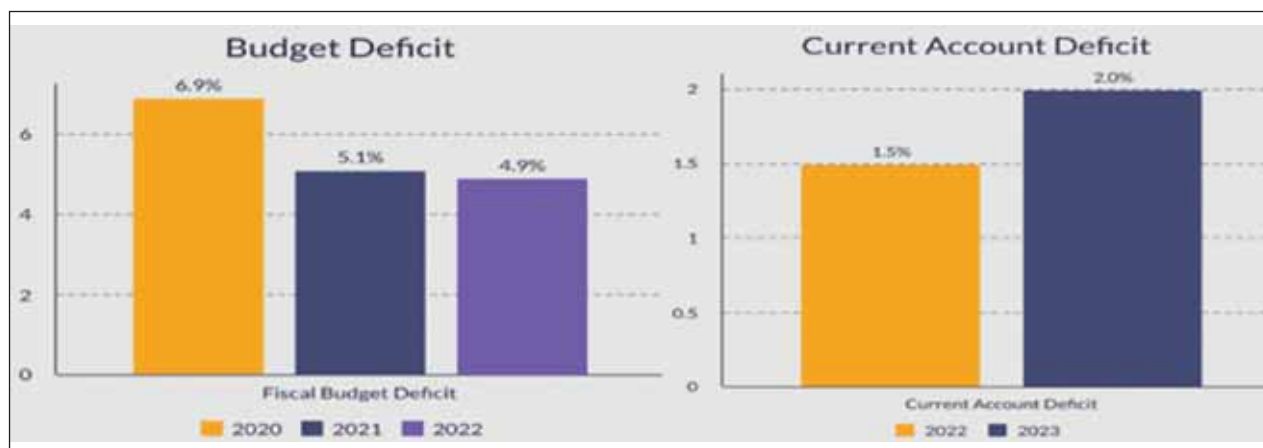


Source: AfDB Africa's Macroeconomic Performance and Outlook, 2024

3.2.1 Continental Fiscal and External Sector Performance

The average budget deficit for Africa narrowed from 6.9% of GDP in 2020 to 5.1% in 2021 and 4.9% in 2022, stabilising in 2023 due to fiscal consolidation and debt restructuring, especially in Ghana, Zambia, and Ethiopia. The debt-to-GDP ratio stabilised at around 63.5% from 2021 to 2023 and is projected to decrease to 60% in 2024, halting a decade-long upward trend. The continent's average current account deficit widened from 1.5% of GDP in 2022 to 2% in 2023 due to increased imports. Current account surpluses in net oil-exporting economies shrank, and resource-intensive economies saw their deficits worsen, while non-resource-intensive economies improved their deficits to within 5% of GDP in 2023. (See Figure 5)

Figure 5: Budget Deficit and Current Account Deficit



Source: Member States and World Economic Outlook, 2024

3.2.2 Continental Inflation

Average inflation in Africa remained high at an estimated 17.8% in 2023, compared to a pre-pandemic average of 10.1% (2015-19), as shown in Figure 6. Fiscal dominance, agricultural supply shocks, low industrialisation, and imported inflation drive this persistent inflation. The 2023 inflation rate, the highest over a decade, increased by 3.7 percentage points from 14.1% in 2022, eroding pre-pandemic macroeconomic gains. Nineteen African countries had double-digit inflation rates by the end of 2022, which remained unchanged in 2023 and is expected to fall to 14 countries in 2024. However, inflation will stay elevated in most countries, impacting economic performance.

Figure 6: Continental Inflation Rate



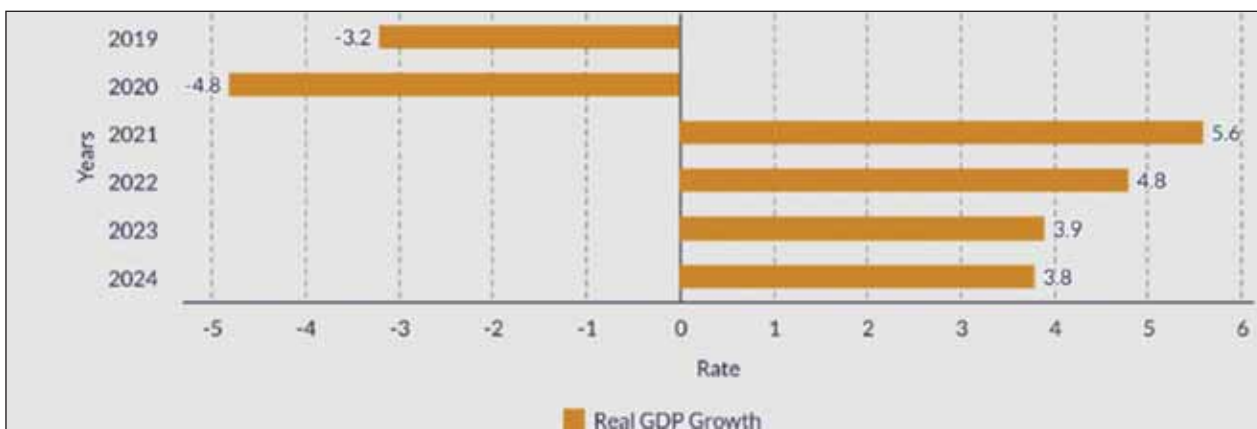
Source: Member States and World Economic Outlook, 2024

3.3 SADC Region's Performance

3.3.1 Economic Growth and Inflation

The region's economy remained subdued in 2023, with average economic growth at 3.9%, down from 4.8% in 2022, as shown in Figure 7. Only Mauritius met the regional target of 7% growth in 2023. The Democratic Republic of Congo and Seychelles, which met the target in 2022, missed it in 2023. The forecasted growth for 2024 is 3.8%, influenced by global economic recovery, inflation, the Russia-Ukraine war, climate events, and financial conditions. Most Member States did not achieve the 7% growth target in 2023, reflecting the general economic performance in the region. Growth is expected to remain stable at 3.8% in 2024.

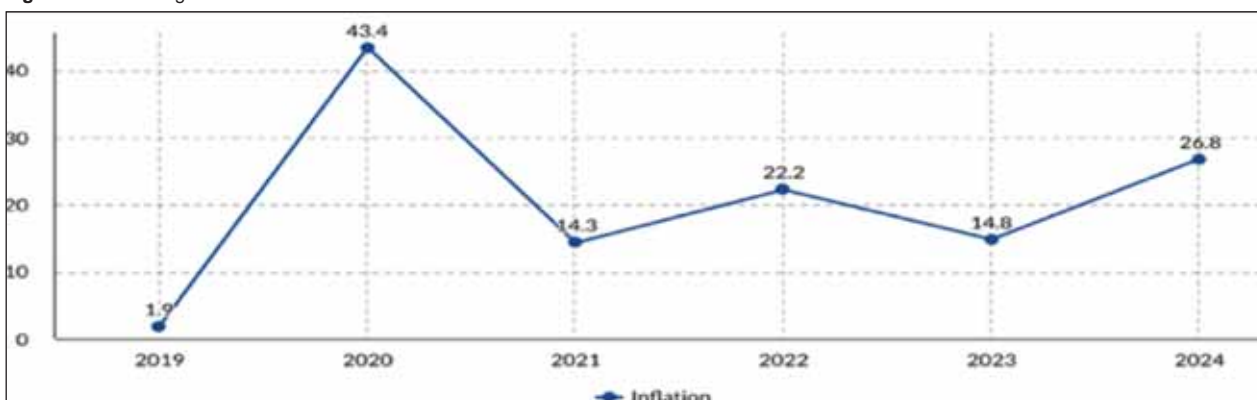
Figure 7: SADC Average Real GDP Growth and Inflation



Source: Member States and World Economic Outlook, 2024

In 2023, regional inflation pressures declined due to relatively low energy, food, oil, and commodity prices, showing the effectiveness of global measures in mitigating the effects of the Russia-Ukraine war. The regional average inflation decreased from 22.4% in 2022 to 14.8% in 2023, mainly due to reduced inflation in Zimbabwe and other Member States, as shown in Figure 8. Seven Member States (Botswana, Eswatini, Lesotho, Mauritius, Namibia, South Africa, and Tanzania) achieved a 3-7% regional inflation target, up from four Member States in 2022. However, inflation projections for 2024 indicate an increase to around 26.8%, which could impact household consumption and private sector investments.

Figure 8: SADC Regional Inflation Rate



Source: Member States and World Economic Outlook, 2024

3.4 Fiscal and External Sector Performance

The fiscal deficit improved to 3.6% of GDP in 2023 from 4.0% in 2022, as shown in Figure 9. Five Member States (Angola, Botswana, Democratic Republic of Congo, Lesotho, and Seychelles) met the regional fiscal deficit target of 3% of GDP in 2023, up from five in 2022. Public debt increased slightly from 59.2% in 2022 to 63.1% in 2023. Six Member States (Botswana, DRC, Eswatini, Lesotho, Madagascar, and Tanzania) achieved the regional debt target of 60% in 2023, like 2022. High regional debt levels could constrain capital and developmental expenditures, impacting sustainable long-term growth and macroeconomic convergence. The region faces elevated fiscal and debt distress risks, with the fiscal deficit projected to worsen slightly to 3.8% of GDP in 2024 and public debt estimated at 58.8% for 2024.

Figure 9: SADC Fiscal Deficit and Debt Evolution relative to GDP



Source: Member States and World Economic Outlook, 2024

The regional external sector deteriorated slightly in 2023 due to weak commodity prices, affecting Member States reliant on commodity exports. The current account deficit as a share of GDP worsened from 3.9% in 2022 to 4.1% in 2023. Five Member States (Angola, Botswana, South Africa, Zambia, and Zimbabwe) performed above the regional threshold of 3% of GDP in 2023, down from eight in 2022. The worsening deficit is attributed to low commodity prices and significant imports for mega projects in Namibia, Mozambique, and United Republic of Tanzania.

Foreign reserves declined from an average of 4.4 months of import cover in 2022 to 4.1 months in 2023. Three Member States (Angola, Botswana, and Mauritius) met the regional target of six months of import cover in 2023, like 2022. Six Member States (DRC, Eswatini, Lesotho, Malawi, Mozambique, and Zimbabwe) recorded less than three months of import cover, partly due to weak global economic conditions.

3.5 Prospects and Risks for SADC in 2024 and the Medium-Term

SADC Member States are projected to progress towards achieving macroeconomic convergence indicators in 2024. However, climate shocks, increasing interest rates, limited fiscal space, high debt levels, geopolitical tensions, and slow global economic growth may affect their financial performance. Poor performance on the Macro-Economic Convergence (MEC) programme poses significant risks to regional integration.

Member States need policies with stabilisation mechanisms to mitigate these challenges and protect MEC targets and citizens' welfare. The 2024 outlook is uncertain, with significant downside risks, including elections in Botswana, Mauritius, Mozambique, Namibia, and South Africa, which may impact fiscal discipline and structural reforms.

Global geopolitical tensions and higher living costs could lead to increased monetary tightening. Power, logistics, and crisis struggles could negatively impact fiscal and public spaces. Climate change remains a significant threat, affecting agriculture and food security, highlighting the need for climate-resilient strategies. The global slowdown in commodity prices will likely weigh down economic growth due to low demand for SADC exports. This calls for diversification and the creation of a regional market.

In conclusion, while SADC Member States are progressing towards macroeconomic convergence, they face many challenges that could impede their progress. Addressing these risks through robust policies and strategic planning is crucial for sustaining economic stability and growth in the region.

The following chapter provides an in-depth analysis of the regional performance on the RISDP 2020-2030 Pillars. It will evaluate the progress towards the strategic objectives outlined in the Regional Indicative Strategic Development Plan, focusing on critical areas such as industrial development, market integration, social and human development, and peace and security. This analysis aims to highlight the achievements and the areas needing improvement to ensure the comprehensive development of the SADC region.



4 REGIONAL PERFORMANCE ON THE RISDP 2020-30 PILLARS

The implementation of the RISDP 2020-2030 recorded good progress with an overall score of 5.7. This score is 0.5 points lower than that of 2022/23 due to the continued effects of COVID-19, climate shocks (including the El-Nino and droughts) and the ongoing Russia-Ukraine war. Below are the scores presented by RISDP Pillar. This report presents a detailed analysis after providing an overview of SADC's performance across all pillars. We begin with the Foundation pillar, followed by the three main pillars, cross-cutting issues, and strategic management of the RISDP. Each section will highlight key achievements, challenges, and areas for improvement.



4.1 Foundation: Peace, Security & Good Governance

Key Messages

Overall Performance: The region scored 7.3 in 2023/24

- SADC remains relatively peaceful and stable, with no new intra-state conflicts or significant acts of terror.
- The situation in Mozambique and the Democratic Republic of Congo remains volatile.
- SADC Electoral Observer Missions were deployed to four Member States in 2023, in line with SADC Principles and Guidelines Governing Democratic Elections.
- Voter participation in SADC elections increased by 14 percentage points from 41% in 2022 to 55% in 2023 but remains below the 65% voter registration recorded in 2020 and below the 70% target in 2030.
- Corruption cases in the public sector were 7,615 compared to 1,005 in the private sector.
- The investigation of money laundering cases increased from 729 in 2022 to 1166 in 2023
- The value of money laundering cases increased from US\$1,2 Billion compared to US\$124.4 million in 2022.
- The value of illicit assets recovered reduced from US\$1,5 billion in 2022 to US\$286 million in 2023. Angola, Namibia, and United Republic of Tanzania however registered a significant increase in the value of assets recovered in 2023.
- A total of 534 women were deployed in various leadership positions in SAMIM and SAMIDRC Missions.
- The slow ratification of the SADC Protocol on the Facilitation of Movement of Persons 2005 with only seven Member States; remains a challenge.
- The Region continues to implement various technologies, such as biometric identification systems, to strengthen border control and facilitate the detection and prevention of fraudulent documents.
- The region recovered about 8,391 illegal firearms and 89,101 rounds of ammunition during various operations conducted by Member States.
- A total of 9128 licenced or state firearms and 56 rounds of ammunitions were reported stolen or lost.
- The Agreement Amending the Protocol on the Control of Small Arms and Light Weapons was adopted and has been effective since September 2023.
- All 16 Member States are implementing rehabilitation and reintegration programmes that include psychological and spiritual counselling, formal and informal education, vocational training, halfway homes and open prisons.

SADC is implementing interventions to enhance conflict prevention, management, and resolution; strengthen political cooperation, democracy, good governance, rule of law, human rights, and human security; and improve collective defence and security to safeguard the region's territorial integrity. The region scored 7.3 in 2023/24, a decrease of 0.4 points from 7.7 in 2022/23.





Photo credits: SAMIM Photos

4.1.1 Safeguard Peace, Security and Stability



The region is generally **peaceful, secure, and stable**, except in DRC and Mozambique, with no new armed or intra-state conflicts. Efforts are needed to achieve lasting peace in eastern DRC and Cabo Delgado in Mozambique and address the significant rise in cross-border criminal activities.

4.1.2 Rapidly Deploy SADC Standby Force

The SADC Missions in Mozambique (SAMIM) and the DRC (SAMIDRC) have achieved significant milestones, including rebuilding activities and the return of over 600,000 out of 1.2 million internally displaced persons. SAMIM degraded the Islamic State Group through intensified patrols and operations, facilitated humanitarian assistance, conducted operations to curb radicalisation and indoctrination, and protected civilian activities.

SADC performs moderately in deploying the SADC Standby Force to conflicts and emergencies, meeting the standard response time of 14 days to armed conflict and humanitarian operations and complex emergencies and 21 days to other elements. To improve the response time, plans are underway to establish a Regional Logistic Depot which will facilitate rapid deployment, prompt reactions, save lives, and prevent crisis escalation

4.1.3 Prevent, Manage and Resolve Conflicts

SADC continued to enhance conflict prevention, mediation, and resolution through the Panel of Elders (PoE) and the Mediation Reference Group (MRG) as directed by the Organ Troika or Summit. Support was provided to Lesotho to expedite stakeholder engagement and finalise the reform process. Additionally, deployments were made to the Democratic Republic of Congo and Zimbabwe to monitor security, peace, and election-related disputes.



4.1.4 Strengthen Early Warning for Conflict Prevention and Mitigation

SADC coordinates the use of an early warning mechanisms for conflict prevention, resolution and management through the Regional Early Warning Centre, supported by National Early Warning Centres. The Centre tracks daily political, security, and socioeconomic threats, coordinating tailored responses for regional stability, peace, and security.

- Political, Security, and Socioeconomic Threats: The region faces increasing foreign interference due to competition for strategic resources and influence, manifesting in support for hostile NGOs, contradictory statements by some embassies, and sanctions. Social and economic threats include fuel theft, kidnappings, extortion, protection racketeering, vandalism, and gangsterism, primarily targeting youth, vulnerable populations, and school learners.
- Capacity Building for Mediation: SADC has made moderate progress in enhancing mediation capacity to address political conflicts. The Secretariat improved the mediation skills of stakeholders, including rostered mediators, the Panel of Elders, the Mediation Reference Group, Non-State Actors, and Member State Officials.

4.1.5 Deploy SADC Electoral Observer Missions

SADC has consistently improved electoral democracy and the regularity of elections, deploying the SADC Electoral Observer Missions (SEOMs) following the SADC Principles and Guidelines Governing Democratic Elections. In 2023, SEOMs were deployed to DRC, Eswatini, Madagascar, and Zimbabwe (Figure 10). The percentage of registered voters declined from 70% in 2021 to 41% in 2022 but increased to 55% in 2023, indicating a need to investigate the causes of low turnout and implement corrective measures. No election-related conflicts were recorded during this period.

Figure 10 SEOM Deployments and Voter Registration



Source: SEOM Reports

4.1.6 Combat Corruption and Money Laundering



Number and Value of Money Laundering Cases Investigated

SADC is making progress towards combatting corruption. Good performance was recorded on the investigation of money laundering cases. A 7.5 score was achieved on the number of money laundering cases investigated and a 6.5 score on the value of the cases investigated. A total of 1166 cases were investigated with a combined value of US\$1,199,821,521.48,47 undertaken in 2023. This is an increase from 694 cases with a total value of US\$124.4 million in 2022. Angola, Namibia, Madagascar and Zambia recorded the highest number of money laundering cases investigated.



Recovery of Illicit Assets

With a score of 8, the Region continues to make progress towards recovering illicit assets. The region however registered a reduction in the value of illicit assets recovered by Member States from US\$3.3 billion in 2022 to US\$286,384,461.21 in 2023. However, Angola, Namibia and United Republic of Tanzania registered a significant increase in the value of assets recovered in 2023 compared to 2022.

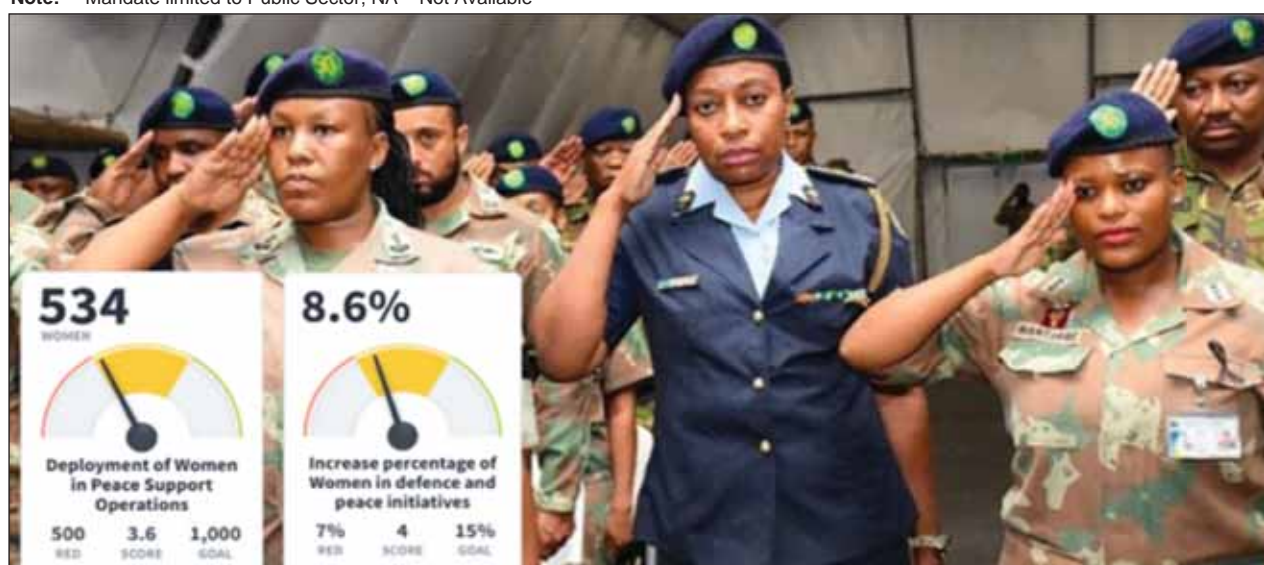
Public Sector vs Private Sector Corruption

Corruption cases in the public sector increased by 22% from 7129 in 2021/22 to 8,667 in 2022/23 as presented in Table 10. Member States are to urgently intensify the investigation of cases of suspected corruption, prosecution of cases where there is evidence of corruption, facilitate private sector and other multistakeholder initiatives to increase participation in anti-corruption, review legislation and undertake corruption risk assessment in vulnerable sectors.

Table 1: Number of Corruption Cases, 2022

Member States	2021/22		2022/23	
	Public Sector	Private Sector	Public Sector	Private and other
Angola	2299	0	939	179
Botswana	237	5**	163	13
DRC	N/A	N/A	147	0
Eswatini	13	14	15	6
Lesotho	N/A	N/A	N/A	N/A
Madagascar	341	426	2658	165
Malawi	659		905	306
Mauritius	189	31	198	26
Mozambique	1240	399	1052	297
Namibia	26	1	26	6
Seychelles	N/A	N/A	25	1
South Africa	14	**	N/A	**
United Republic of Tanzania	1097	91	1648	75
Zambia	505	14	308	16
Zimbabwe	509	175	583	212
Total	7129	1156	8,667	1,302

Note: ** Mandate limited to Public Sector; NA – Not Available



Source: 2023 Annual Anti- Corruption Report
Photo credits: SAMIM Photos

4.1.7 Increase Women's Participation in Peace and Security

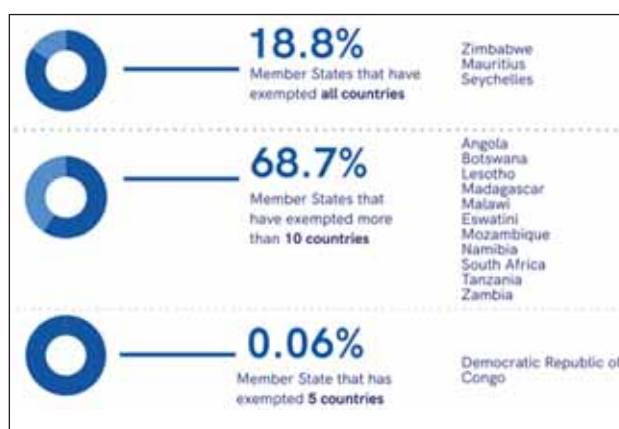
SADC is to intensify efforts to recognise and support women's full and equal representation in peace and security. Women constitute 9.66% of SAMIM and 7.6% of SAMIDRC deployments, totaling 8.6% across all missions, below the 30% target by 2030.

On the positive side, there has been an increase in women in leadership roles, including a female Chief of Staff for SAMIM, two female Contingent Commanders, an Air Component Commander, and a Civil-Military Cooperation Coordinator for SAMIM, and female leaders in various other key positions.

4.1.8 Facilitate Movement of Persons in the Region

The region continues to prioritise the facilitation of Movement of Persons and goods to promote regional integration, economic growth, and social development.

This has been primarily through continuous implementation of the provisions of the SADC Protocol on the Facilitation of Movement of Persons (2005 (not yet in force) i.e Visa-free travel and visa facilitation, cross-border infrastructure and border control systems , availability of travel documents for those who meet the set requirements, 90 days VISA waiver, bilateral Agreements to harmonise border working hours; Right of Establishment and Residence e.t.c.



Sources: SADC Ministerial Committee of the Organ Records, 2024

While there's still work to be done, many SADC Member States have visa-free or visa-on-arrival policies for most other Member States, as outlined in Table 2 below, indicating progress towards regional mobility and integration.

Table 2: Status of VISA

Member State	Visa Required
Angola	DRC, Comoros
Botswana	DRC and Madagascar
Union of the Comoros	To be updated
DRC	Angola, Botswana, Lesotho, Malawi, Mozambique, Namibia, Seychelles, South Africa, Eswatini, Tanzania and Zambia
Eswatini	DRC
Lesotho	Angola, Comoros and DRC
Madagascar	Angola, Botswana, Mozambique, Namibia, South Africa and Zambia
Malawi	DRC and Comoros
Mauritius	-
Mozambique	DRC, Madagascar, Comoros
Namibia	DRC, Comoros and Madagascar
Seychelles	-
South Africa	DRC and Comoros
Tanzania	Angola and Comoros
Zambia	Comoros, DRC and Madagascar
Zimbabwe	-

Source: SADC Ministerial Committee of the Organ Records, 2024

4.1.9 Honour the Founders of SADC

SADC attaches great importance to the preservation of the political history of the organisation from the days of the then SADCC to the present-day SADC. A statue in honour of His Excellency Mwalimu Julius Kambarage Nyerere was unveiled at the Julius Nyerere Peace and Security Building.

4.1.10 Intensify Efforts to Address Transnational Organised Crime

The region continues to conduct cross-border and inter-regional and simultaneous joint operations to address transnational organised crime and enforce the law. However, while such operations decreased, cross-border criminal activities increased from 2022/23 to 2023/24. The number of arrests and cross-border cases rose significantly by 913.



Cross-Border Operations, Arrests, Cases and Recorded Offences in the Region, 2022 and 2023

The recorded offences chart highlights a particularly alarming rise in trafficking in human beings and motorcycle-related offences. Narcotic drugs are also a cause for concern with the potential to spiral out of control. However, the region has put several measures in place to combat Trafficking in Persons and Smuggling of Migrants including, amongst others, upgrading the SADC Trafficking in Persons Data Collection System, development of the Protocol against Trafficking in Persons. Furthermore, the region is also implementing Protocol on Combatting Illicit Drugs and the Integrated Strategy to Prevent and Combat Transnational Organised Crime in the SADC Region. These frameworks are aimed at enhancing collaboration among the Member States to effectively address these growing challenges.



4.2 Pillar I: Industrial Development & Market Integration

Key Messages

Overall Performance: The region registered a score of 4.3 in 2023/24.

- Manufacturing Value Added to GDP remained stagnant at 11.2% in 2023, with significant variations among Member States.
- Manufacturing employment slightly decreased by 0.3% from 12.7% in 2021 to 12.4% in 2022, with persistent gender disparities.
- Manufacturing trade value in the SADC region increased by US\$45,372M in 2022 from US\$184,647M in 2021 to US\$210,019M in 2022.
- Intra-SADC trade to GDP increased to 18.3% in 2023 but declined in absolute values.
- Extra-regional trade remains significantly higher than intra-regional trade.
- Intra-SADC manufacturing trade slightly declined by 0.2% in 2022 from 22.9% in 2021 to 22.7% in 2022.
- SADC's total merchandise trade balance declined by US\$9,778M in 2023 to US\$19,533M.
- With increased inflows, Foreign Direct Investment flows remained stable at 6 billion in 2022.
- The financial inclusion rate reached 77% in 2023, up from 66% in 2020.
- Real-Time Gross Settlement (RTGS) transactions doubled from 2019 to 2023.
- Primary indicators of the Macroeconomic Convergence Programme missed their targets.
- Tourists from non-Member States increased from 6,933,617 in 2020 to 12,700,000 in 2022, progressing towards the 2030 target of 25,510,000.
- Cereal production reached 66.8% of the 2030 target. Livestock production reached 66,7% of the 2030 target.
- Food insecurity worsened, increasing from 15% in 2022 to 18% in 2023.



4.2.1 Increase Manufacturing and Trade in the Region

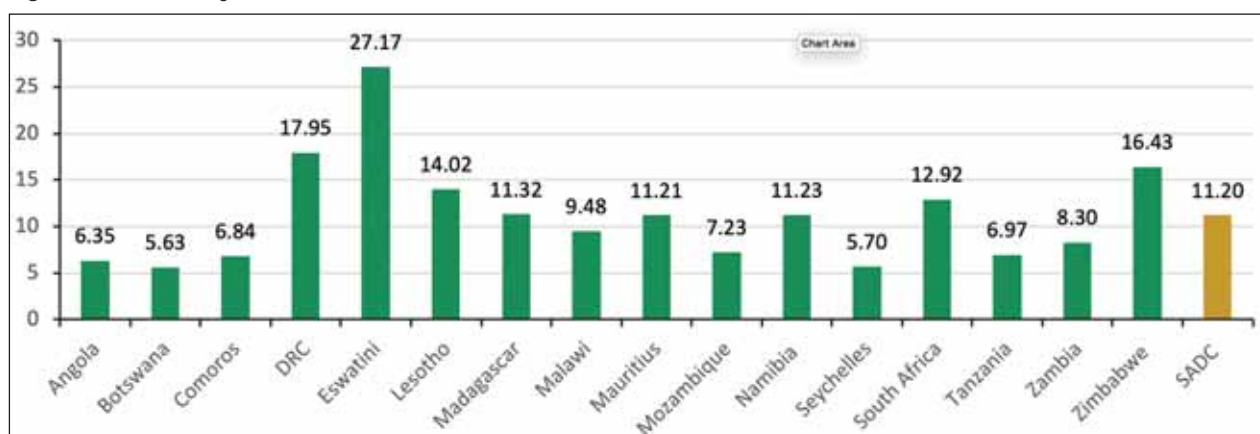
Manufacturing Value Added to GDP



The manufacturing sector consistently contributed to GDP, with Manufacturing Value-Added (MVA) ranging between 11% and 12%. MVA increased by 1.2% from 2022 to 2023, though it declined from 2010 to 2016 due to global economic conditions, domestic policy changes, and economic shifts.

MVA as a percentage of GDP varies among SADC countries: Botswana (5.6%), Eswatini (27.2%), Democratic Republic of Congo (18%), Lesotho (14%), South Africa (12.9%), and Zimbabwe (16.4%). Figure 11 indicates the region may not achieve the target of 30% MVA by 2030.

Figure 11: Manufacturing Value Added as a Share of GDP Across Member States in 2023



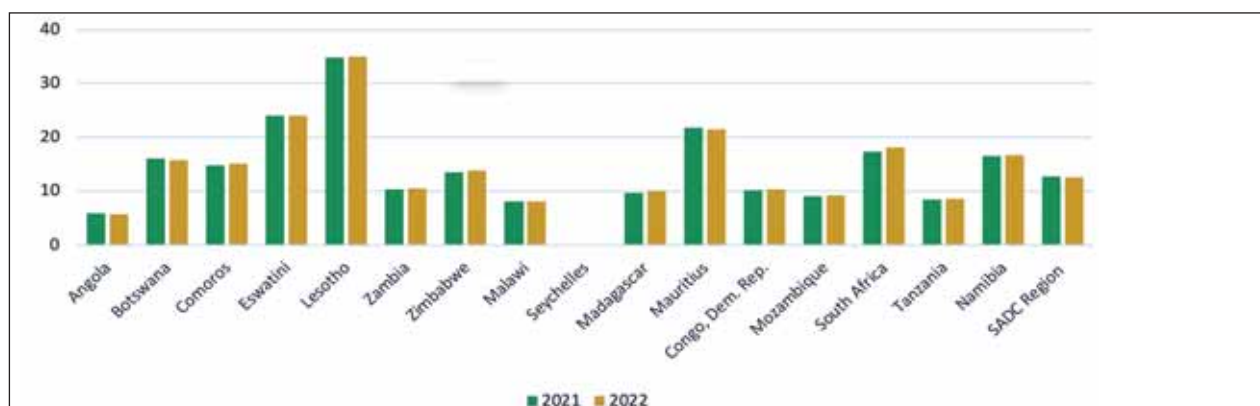
Source: SADC Statistics, 2023

4.2.2 Increase Manufacturing Employment



Manufacturing employment in the region decreased slightly by 0.3%, from 12.7% in 2021 to 12.4% in 2022, with persistent gender disparities: females at 9.1% and males at 15.6%. The target of 30% industry employment by 2030 remains distant. Employment in the industry sector varies among Member States: Eswatini and Lesotho have the highest employment percentages (25-30%). From 2021 to 2022, there were slight changes in employment percentages for most countries, with some increasing and others decreasing slightly. Figure 12 highlights these variations.

Figure 12: Manufacturing Employment by Member States



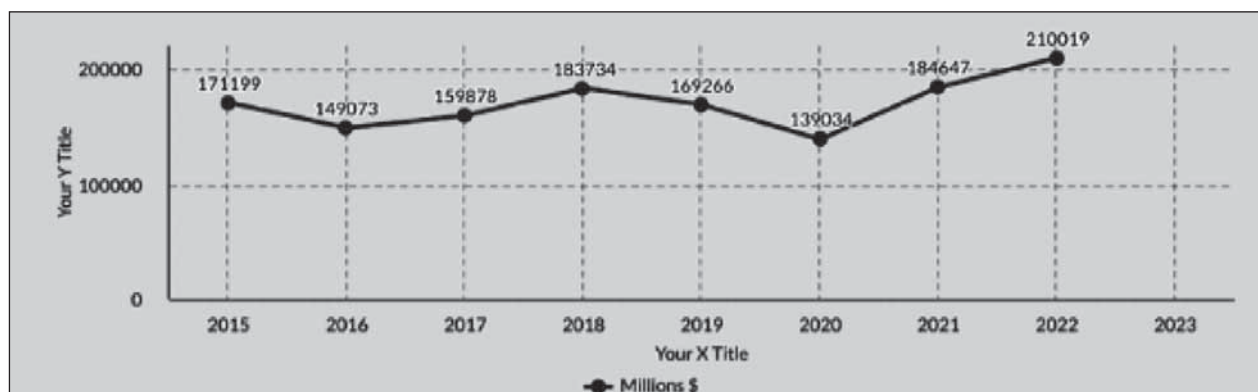
Source: World Development Indicators: <https://databank.worldbank.org/source/world-development-indicators#>, downloaded May 2024

4.2.3 Increase Trade in the Region

Manufacturing Trade in the Region

The manufacturing trade value in the region grew from US\$171,199 million in 2015 to US\$210,019 million in 2022, with the lowest point in 2020 at US\$139,034 million and the highest in 2022, as shown in Figure 13. The most significant growth occurred between 2020 and 2021. Despite fluctuations, there was a net increase of \$38,820 million over seven years, emphasising the importance of intra-regional trade and industrial cooperation. Strengthening manufacturing capacities, promoting technology transfer, and enhancing trade facilitation are critical priorities for sustainable regional growth.

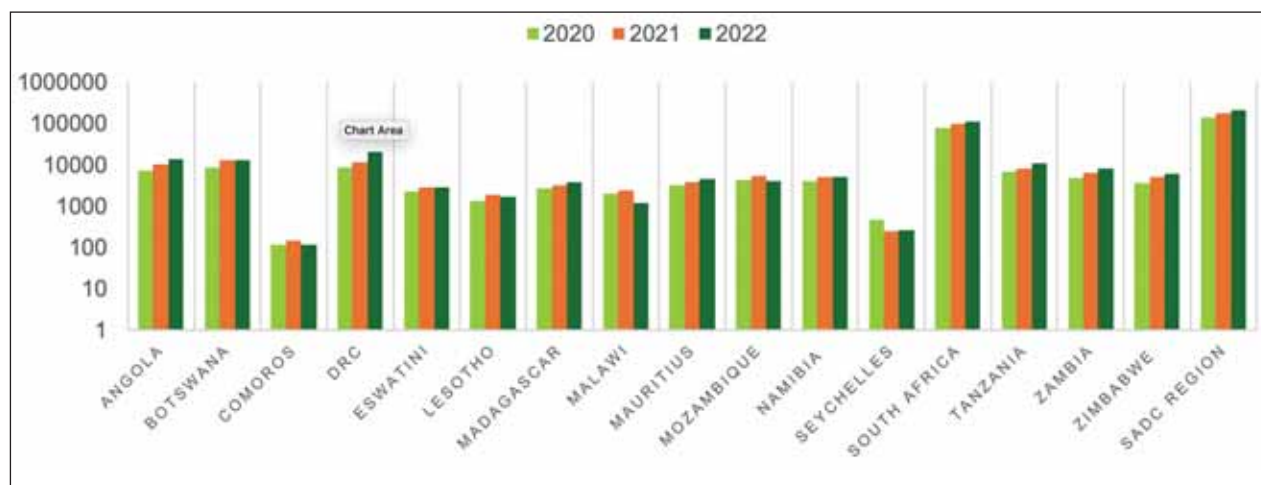
Figure 13: Manufacture Trade in SADC, Million \$, 2015 – 2022



Source: SADC Statistics, 2023

As shown in Figure 14, Most Member States saw growth in manufacturing trade values from 2020 to 2022. This positive trend is due to increased industrialisation, favourable trade policies, and recovery from the COVID-19 pandemic. However, disparities persist between top-performing and lower-performing Member States, indicating opportunities for enhancing manufacturing sectors and promoting balanced regional growth.

Figure 14: Manufacturing Trade in SADC, Millions \$, 2020 - 2022



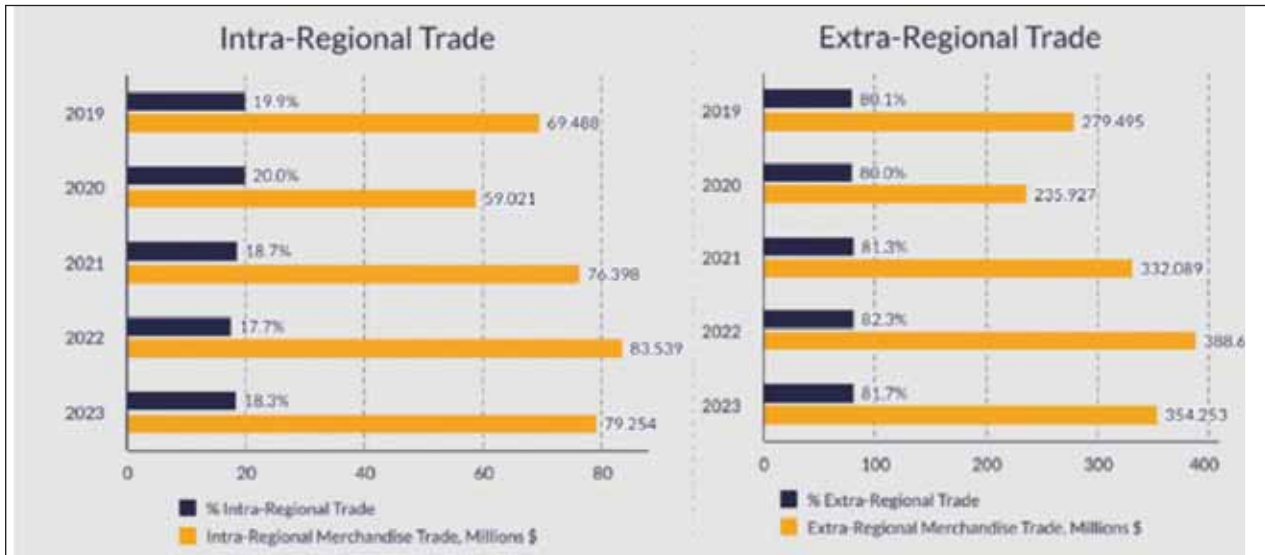
Source: SADC Statistics, 2023

4.2.4 Increase Intra-SADC and Extra-Regional Trade

Intra-regional trade declined by US\$4,285 million from US\$83,539 million in 2022 to US\$79,254 million in 2023. Extra-regional trade also dropped by US\$34,370 million from US\$388,623 million to US\$354,253 million. Despite these declines, extra-regional trade remains significantly higher, indicating the region's focus on trading with countries outside the region, as shown in Figure 15.



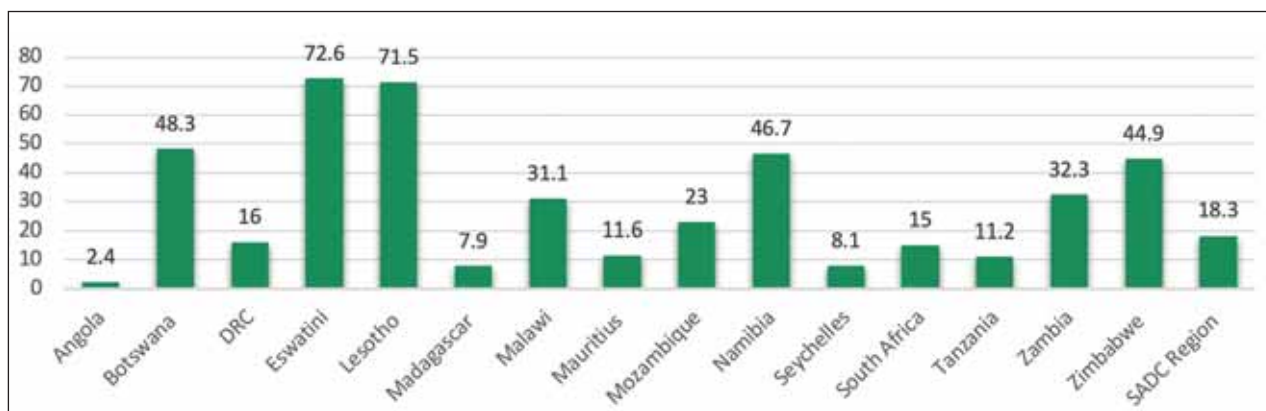
Figure 15: Intra-SADC and Extra Regional Trade in the Region



Source: SADC Statistics, 2023

Figure 16 shows varying engagement in intra-regional trade among Member States in 2023. Eswatini and Lesotho lead with 72.6% and 71.5%, respectively, followed by Botswana (48.9%), Namibia (46.7%), and Zimbabwe (44.9%). Angola has the lowest at 2.4%, indicating potential for more integration. The trend highlights the need for increased efforts in regional economic integration. SADC is implementing various trade provisions to boost intra-regional trade, including (i) the Electronic -Certificate of Origin (e-CoO), (ii) the Regional Customs Transit Guarantee (iii) the Coordinated Border Management concept, (iv) the establishment of One Stop Border Post (OSBP) (v) Simplified Trade Regime (STR) and (vi) simplified trading arrangements. These have enabled an increase in informal cross-border trade covering both agricultural and non-agricultural commodities. More efforts are needed to reduce trade barriers, harmonise regulations, and invest in infrastructure.

Figure 16: Intra-SADC Trade as % of SADC Total Trade across Member States, 2023

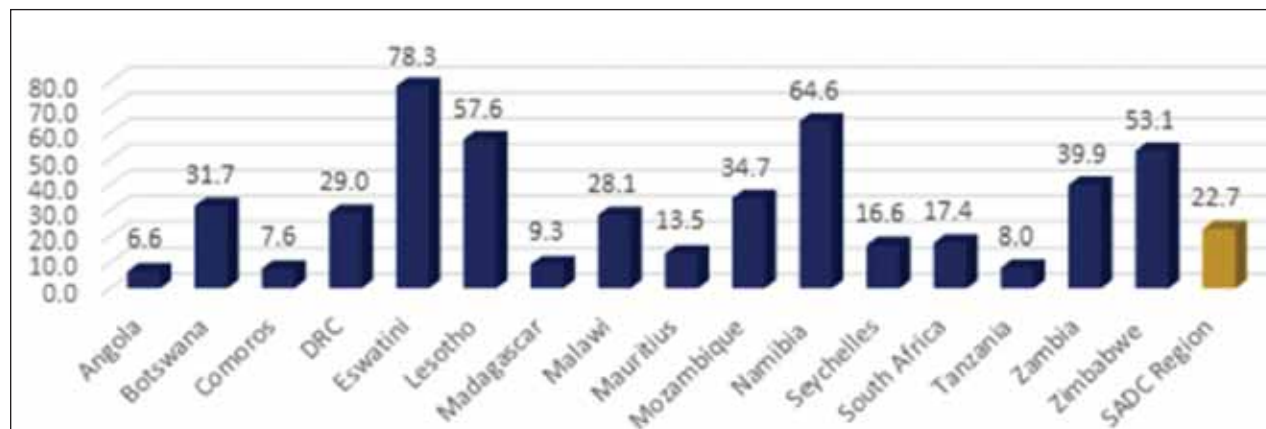


Source: SADC Statistics, 2023

Intra-SADC Manufacture Trade

Intra-SADC manufacturing trade accounted for 22.7% of the total in 2022, slightly down from 22.9% in 2021. Eswatini had the highest trade at 78.3%, and Angola the lowest at 6.6%. As countries specialise in manufacturing sectors, intra-manufacturing trade strengthens regional supply chains, promotes economic integration and enhances competitiveness within the market

Figure 17: Intra-SADC Manufacture Trade (%), 2022

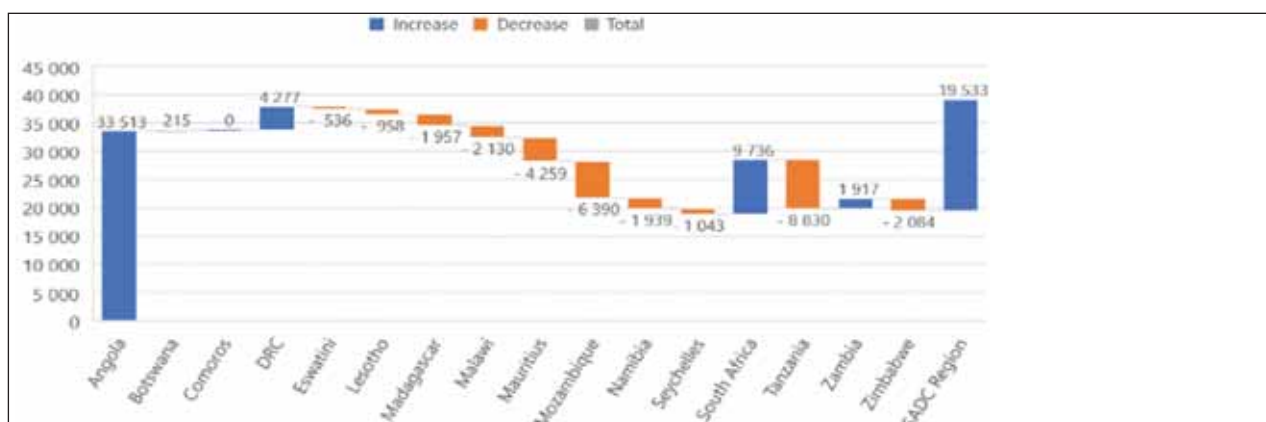


Source: SADC Statistics, 2023

Total Merchandise Trade Balance

SADC's total merchandise trade balance was US\$9,755 million in 2023, down from US\$19,533 million in 2022. Angola had the highest surplus at US\$22,983 million, followed by the Democratic Republic of Congo at US\$7,107 million, as shown in Figure 18. Eswatini, South Africa, and Zambia also contributed to the positive balance. However, several Member States, including Botswana, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Seychelles, Tanzania, and Zambia, recorded trade deficits, indicating a need for strategies to address regional trade imbalances.

Figure 18: Total Merchandise Trade Balance, Millions \$, 2023



Source: SADC, 2023

SADC Merchandise Trade by SITC, Million US\$, 2022

The total Free on Board (FOB) exports as per the Standard International Trade Classification (SITC) increased from US\$216,414 million in 2021 to US\$247,905 million in 2022, indicating export growth as shown in Table 2. The largest export category was Manufactured goods, which slightly decreased from US\$77,347 million to US\$76,112 million. The second-largest category, Mineral fuels, lubricants, and related materials, significantly increased from US\$45,212 million to US\$70,379 million.



As shown in Table 3, total imports rose significantly from US\$157,541 million in 2021 to US\$211,762 million in 2022. The largest import category was machinery and transport equipment, increasing from US\$45,907 million to US\$62,610 million. The smallest import categories were “animals and vegetable oils, fats & waxes,” “crude materials, inedible, except fuels,” and “beverages and tobacco”, all under US\$10,000 million each year but still showing growth from 2021 to 2022.

Table 3: Gross Domestic Expenditure on Research and Development as a % of GDP

Description	Exports		Imports	
	2021	2022	2021	2022
Food and live animals	16,008	17,080	24,082	31,363
Beverages and tobacco	3,548	3,818	3,338	4,300
Crude materials, inedible, except fuels	29,858	31,130	5,121	7,292
Mineral fuels, lubricants, and related materials	45,212	70,379	26,307	52,732
Animals and vegetable oils, fats & waxes	414	591	4,352	6,810
Chemicals & related products, n.e.s.	15,710	18,851	25,738	30,573
Manufactured goods classified chiefly by material	77,347	76,112	26,543	29,678
Machinery and transport equipment	21,881	22,720	45,907	62,610
Miscellaneous manufactured articles	4,813	5,203	18,264	20,456
Total Exports	216,414	247,905	157,541	211,762

Source: SADC Statistics, 2023

4.2.5 Develop Regional Value Chains

The development of value chains in the region is in its early stages. SADC is developing policy and regulatory frameworks to support the development of value chains and enhance the region’s participation in global value chains. The region has developed Regional Model Policy Frameworks to support the growth of the regional leather value chain and the Antiretroviral (ARV) chain with anticipated greater interface between the public and private sectors.

Increase Spending on Research and Development

In SADC, Gross Domestic Expenditure on Research and Development (GERD) as a percentage of GDP shows that no Member State has reached the 1% target set by the Protocol on Science, Technology, and Innovation and the Science, Technology, and Innovation Strategy for Africa (STISA-2024) (see Table 4). South Africa and Tanzania are closest with GERD values of 0.62% and 0.52%, respectively, while Madagascar and Angola have the lowest values at 0.01% and 0.07%. Reporting remains a challenge, and digitised surveys at the national level could help reduce costs and improve data consistency for R&D and innovation.

Table 4: Gross Domestic Expenditure on Research and Development as a % of GDP

Member State	GERD
Angola	0.07% (2022)
Botswana	0.46% (year and source not given)
Democratic Republic of Congo	0.43% (R&D survey conducted in 2015)
Eswatini	0.32% (African Innovation Outlook III, 2019)
Lesotho*	-
Madagascar	0.01% (World Bank Report, 2017)
Malawi	0.17%
Mauritius	0.31% (2022 UNESCO)
Mozambique	-
Namibia	0.34% (2013/14 R&D survey) **
Seychelles	0.4% African Innovation Outlook III, 2019)
South Africa	0.62% (R&D Survey 2021/22)
United Republic of Tanzania	0.52% (2022)
Zambia	0.36% (2022)
Zimbabwe	Not applicable

Source: Member States Innovation and Research and Development Surveys

4.2.6 Improve Access to Banking and Non-Banking Financial Services Financial Inclusion

77%



Percentage of adults in the region that are financially included (Financial Inclusion)

34% RED 7.1 SCORE 72.3% GOAL

In 2023, the region achieved high level of financial inclusion, with 77% of adults being financially included. This number is expected to increase by December 2024 due to the ongoing legal, financial, and political efforts by Member States to create a more conducive regulatory environment for non-bank financial institutions.

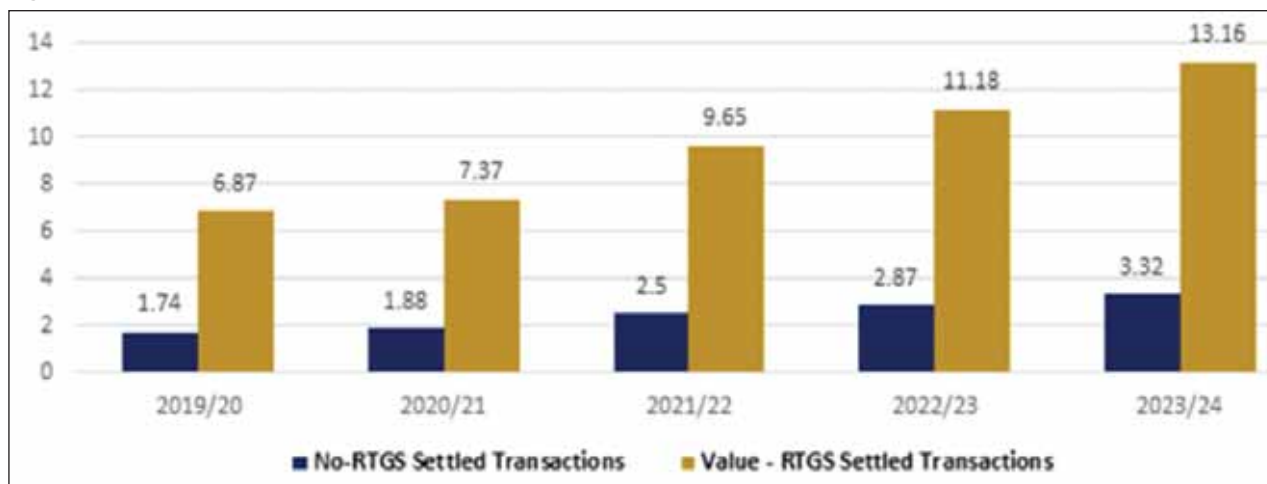
4.2.7 Promote Regional Monetary Cooperation and Cross-Border Payments Increased Real Time Gross Settlement Transactions

The region's Real-Time Gross Settlement (RTGS) system showed strong performance, with 3,318,036 transactions valued at R13.16 trillion settled by end-December 2023. By May 2024, transactions increased to 3,384,624, valued at ZAR13.49 trillion (US\$701.88 billion), as shown in Figure 19. Ninety banks from 15 SADC Member States (excluding Comoros) are electronically linked for real-time cross-border payments and settlements.



The region saw a 17.7% increase in RTGS settled transactions, rising from 11.18 million in 2022/23 to 13.16 million in 2023/24. In terms of value, there was a slight increase of 0.03% between these periods.

Figure 19: RTGS-Settled Truncations

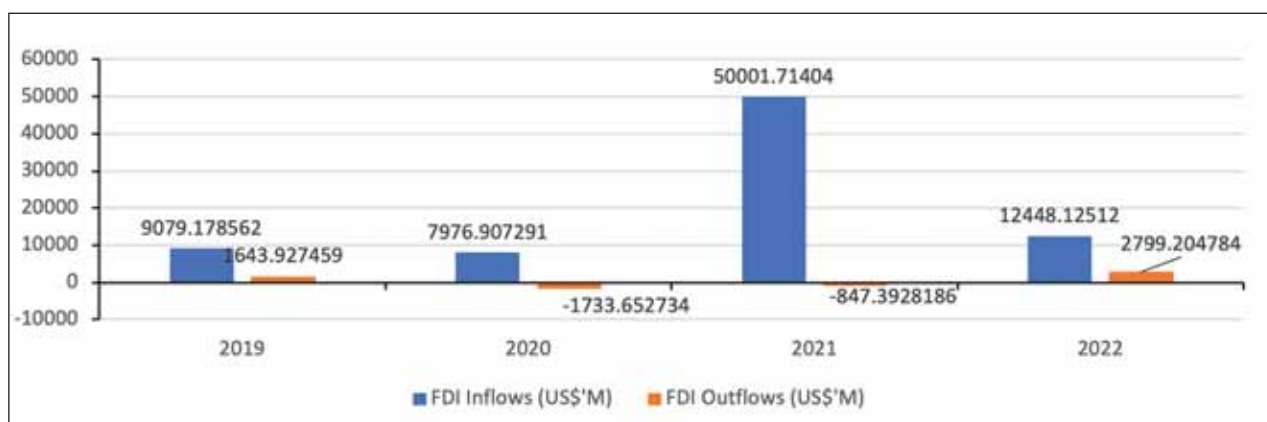


Source: SADC RTGS Report-Settlement Statistics and Indicators,2019-2024

4.2.8 Promote Foreign Direct Investment in Line with International Standards and Global Trends

Foreign Direct Investment (FDI) to GDP recorded a score of 4.2. FDI in the region declined from 6.4% in 2021 to 1.5% in 2022. FDI inflows dropped significantly from US\$50,002 million in 2021 to US\$12,448 million in 2022. Conversely, FDI outflows improved from -US\$841 million in 2021 to US\$2,799 million in 2022, as shown in Figure 20. SADC is developing policies and frameworks to attract FDI, support the SDGs, and facilitate the green and digital transition.

Figure 20: Foreign Direct Investment Inflows and Outflows in the SADC Region (US\$'M)



Source: SADC Statistics, 2023

4.2.9 Improve the Region's Performance on Macroeconomic Economic Convergence

Average Regional MEC Primary Indicators

According to the scorecard, the region continued to miss the average regional primary indicators for economic growth. The regional inflation rate and fiscal deficit improved by 7.6% and 0.6% in 2023 but remained above agreed targets. Conversely, public debt and economic growth slowed by 2.1% and 0.9%, respectively, in 2023.



In 2023, Member States showed mixed performance, as highlighted in the scorecard. Fourteen Member States are implementing the Macroeconomic Convergence Framework. Seven achieved inflation targets, but Malawi (14.8%) and Zimbabwe (98.55%) had high averages. Only Botswana (21.9%), DRC (17.8%), Madagascar (39.7%), and Tanzania (44.1%) kept debt levels below the 60% threshold. Angola and Lesotho had fiscal surpluses, while seven others exceeded the fiscal deficit ceiling. Only the DRC and Mauritius met the macroeconomic targets in 2023, impacting regional growth



4.2.10 Improve Agricultural Productivity and Food Security

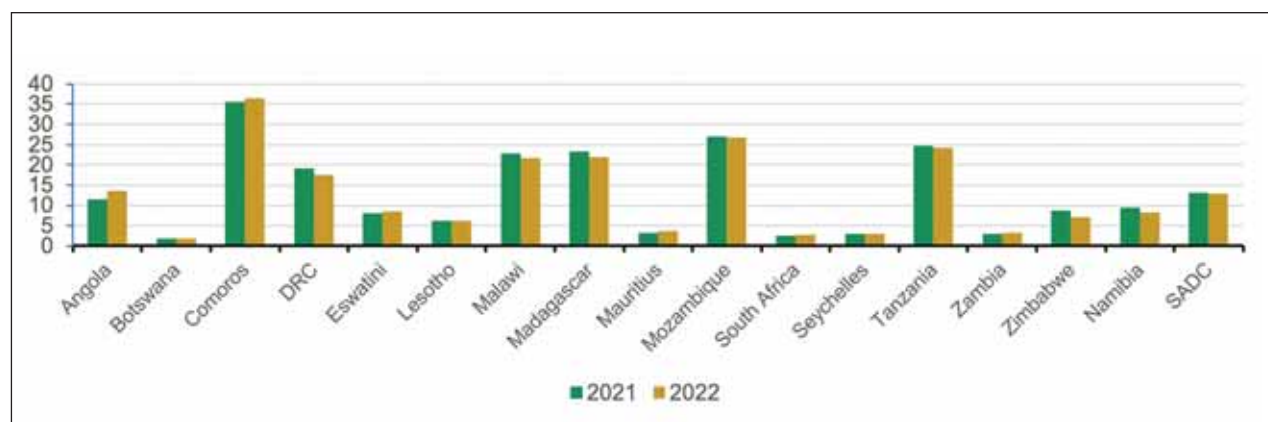
According to the scorecard, significant progress was made in cereal and livestock production, with 66.8% of cereal and 66.7% of livestock production targets achieved, moving towards the 2030 goals. Initiatives like the Harmonized Seed Regulatory System and the Regional Fertilizer Programme have improved crop yields. Agricultural investment grew by 2% by 2024, advancing towards the 2030 investment goal. Strategic frameworks such as the Comprehensive Africa Agricultural Development Programme (CAADP) and the Regional Irrigation Policy (RIP) support sustainable agricultural development, aligning with RISDP targets



Agriculture Contribution to GDP and Employment

Agriculture is the primary source of subsistence, employment, and income for 61% of the region's population, contributing 4% to 27% of GDP among SADC Member States, as shown in Figure 21. Between 2021 and 2022, countries with a higher share of agriculture in GDP include Angola, Comoros, DRC, Malawi, Madagascar, Mozambique, and Tanzania. Agriculture accounts for around 13% of total export earnings and about 66% of the total value of intra-regional trade.

Figure 21: Agriculture as Percentage of GDP in SADC



State of Food Security in the Region

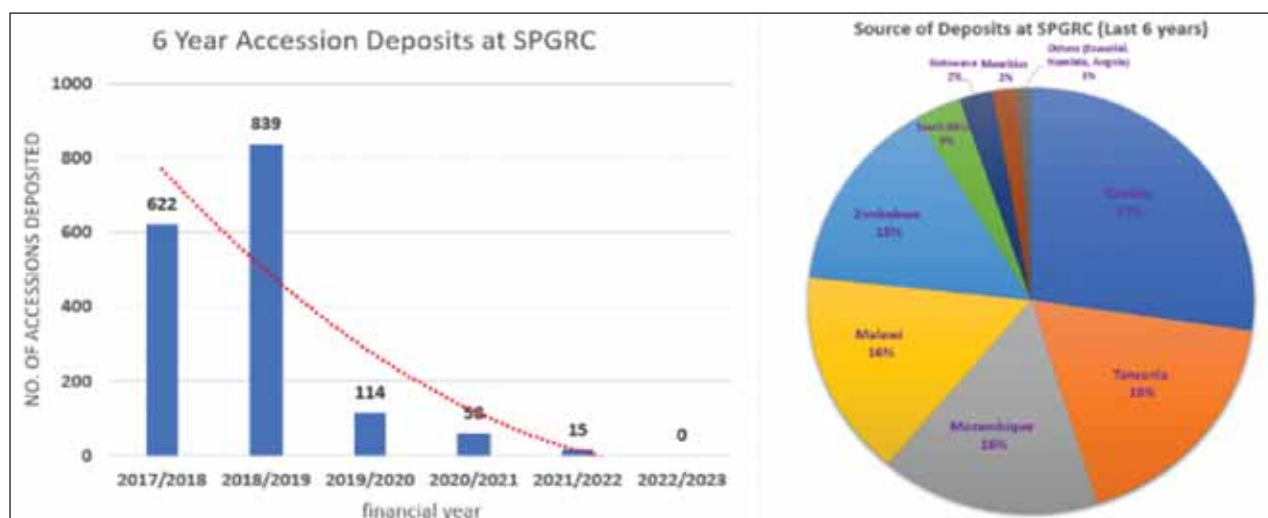


The 2023 Regional Synthesis Report estimates 56.8 million people in SADC to be food insecure, a 5.9% decline from the previous year. However, regional food insecurity worsened by 3%, rising from 15% in 2022 to 18% in 2023. Food insecurity increased in Eswatini (9.3%), Malawi (15.1%), and Namibia (78.4%), while it decreased in DRC (-3.8%), Madagascar (-22.9%), South Africa (-6.3%), Tanzania (-19%), Zambia (-4.4%), and Zimbabwe (-22.1%).

Conservation of Plant Genetic Resource Accessions

The SADC Plant Genetic Resources Centre (SPGRC) has improved plant genetic resource accessions by 25% in 2023, crucial in achieving RISDP agricultural targets by 2030. However, accession deposits have declined over the past six years, reaching zero in 2022/2023, as shown in Figure 22. Most deposits in recent years came from Mozambique, Tanzania, Zambia, and Malawi, with 30% from other Member States.

Figure 22: Member States Accessions Deposited at SPGRC



4.2.11 Promote Tourism Development in the Region

The number of non-Member State resident tourists travelling within in SADC increased from 6,933,617 in 2020 to 12,700,001 in 2022, nearing 96% of pre-pandemic levels by 2023. The establishment of the SADC Regional Tourism Private Sector Platform and Tourism working groups aims to attract more tourists and investment and involve local communities in tourism activities. The region is progressing towards the 2030 target of 25,510,000 tourists and an 11.2% average share.

4.3 Pillar II: Infrastructure Development in Support of Regional Integration

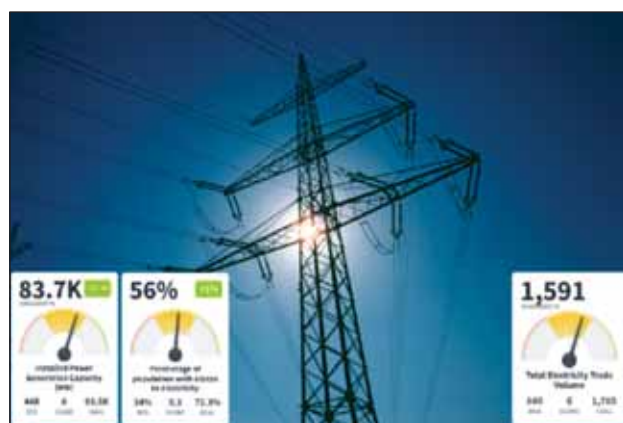
Key Messages

Overall Performance: The region registered a score of 5.8 in 2023/24.

- The population with access to electricity remains at an average of 56% from 2019 to 2023, below the regional target of 85% by 2030.
- The installed capacity for the 12 mainland SADC Member States is 79,810 MW, with an operating capacity of 48,112 MW. The Southern African Power Pool (SAPP) has an operating capacity of 41,136 MW for nine participating Member States.
- The region relies on coal (59%) and hydropower (24%), with potential for hydropower and a gradual adoption of renewable energy technologies.
- Fifty-eight energy infrastructure projects were identified, with 23 prioritised and 22 at various development stages. Three transmission corridors were identified, namely the Central (East – West) Corridor, the Central (North – South) Corridor, and the West (North – South) Corridor. Two projects (MaMo and RSANam) are in the construction phase.
- Average internet penetration in SADC is 54%, with Botswana, Eswatini, Mauritius, Seychelles, and South Africa surpassing the 2030 target of 90%.
- Mobile penetration in the region averages 91%.
- Sixty-three per cent of the population have access to safely managed water, while only 37% have access to improved sanitation facilities.
- Seven functional River Basin Organisations (RBOs) have been established, with a target of 10 by 2030.
- Dam levels are high, averaging 90% capacity, due to significant rains in October/November 2023 and cautious dam operations.
- Significant progress has been made, with 257 standalone regional Automatic Weather Stations (AWS) in 2023 against a target of 305 by 2030.
- The Regional Trunk Road Network increased from 62,668 km to 79,500 km since 2009.
- Six One-Stop Border Posts (OSBPs) (Chirundu, Kazungula, Mwami/Mchinji, Nakonde/Tunduma, Dedza/Colomue, and Zobue/Mwanza) have been established, with three under construction. The Lobito Corridor Transit Transport Facilitation Agency Agreement was signed by Angola, DRC, and Zambia, with Angola and Zambia ratifying the agreement.



4.3.1 Increase Electricity Generation Capacity and Access to Electricity



As per the scorecard below, the percentage of the population with access to electricity has remained at an average of 56% from 2019 to 2023, against the regional target of 85% by 2030. Access varies significantly, with some Member States achieving 100% while others remain below 20%. Notably, the weighted average access to electricity in SADC is higher than other Regional Economic Communities (RECs) in Africa. SADC Member States must implement measures to increase access to meet the target.

Table 5 shows that the installed capacity for the 12 mainland SADC Member States is 79,810 MW, with an operating capacity of 48,112 MW. For the nine Member States with utilities participating in the Southern African Power Pool (SAPP)—Botswana, DRC, Eswatini, Lesotho, Mozambique, Namibia, South Africa, Zambia, and Zimbabwe—the installed capacity is 70,869 MW, with an operating capacity of 41,136 MW.

To enhance the security of energy supply and address the power generation deficit, the region commissioned 1,261 MW in 2023, contributed by Angola, Botswana, Lesotho, Malawi, Mozambique, Namibia, Tanzania, Zambia, and Zimbabwe using various technologies.

Table 5: Power Demand and Supply System, Q1 of 2024

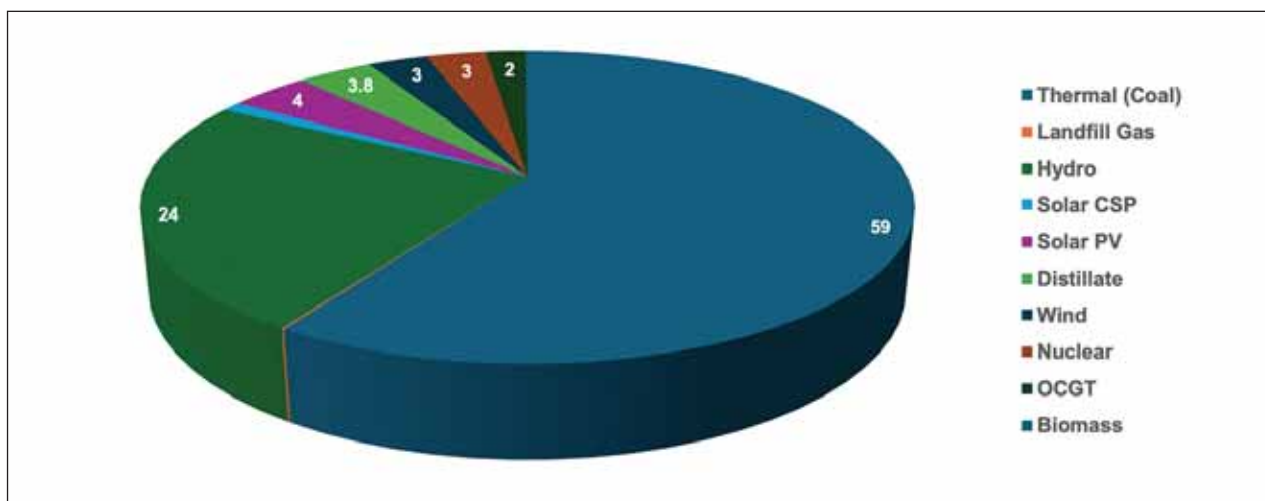
Country	Utility	Installed Capacity (MW)	Operating Capacity (MW)	Current Peak Demand (MW)	Peak Demand Plus Reserves	Capacity Excess/
Angola	RNT	6,250	5,128	2,354	2,727	2,401
Botswana	BPC	892	605	678	750	- 145
DRC	SNEL	2,819	2,096	4,213	4,522	- 2,426
Eswatini	SEC	71	61	239	259	- 198
Lesotho	LEC	102	72	196	211	- 139
Malawi	ESCOM	562	368	368	380	- 12
Mozambique	EDM/HCB/ MOTRACO	2,796	2,231	2,081	2,125	106
Namibia	NamPower	624	370	643	695	- 325
South Africa	Eskom	57,477	32,711	33,873	38,954	- 6,243
Tanzania	TANESCO	2,129	1,480	1,573	1,733	- 253
Zambia	ZESCO/CEC/ LHPC/NECL/IPP	3,676	1,590	2,135	2,297	- 707
Zimbabwe	ZESA	2,412	1,400	1,724	1,900	- 500
Total (All)		79,810	48,112	50,077	56,553	- 8,441
Total (Operating Members)		70,869	41,136	45,782	51,713	-10,577

Source: Southern African Power Pool (SAPP) and SADC

4.3.2 Diversify the Generation Energy Mix

The region relies heavily on coal and hydropower, constituting 59% and 24% of the energy mix, respectively, as presented in Figure 23. Significant potential exists for hydropower and the adoption of renewable energy technologies. To ensure a reliable power supply, it is crucial to diversify the energy mix by increasing the adoption of renewables, promoting integration and cross-border energy trade, investing in energy efficiency measures, and encouraging private sector participation.

Figure 23: Installed Generation Energy Mix, 2023



Source: Southern African Power Pool and SADC Member States

4.3.3 Increase Renewable Energy Share

From 2019 to 2023, the percentage share of renewable energy increased marginally from 25% to 38%, with a one percentage point rise from 2022. Despite this 13-percentage point increase, a significant gap remains to reach the 2030 target. Concrete interventions are necessary to attract private sector investment, accelerate the transition to a sustainable, low-carbon energy future, and promote the uptake of renewable energy in the region.



4.3.4 Develop Regional Power Projects

The region has identified 58 energy infrastructure projects and prioritised 23 of them, with 22 at various stages of development. The following regional projects are currently under development (see Figure 24):

- The Facility Agreement between SAPP and the Development Bank of South Africa (DBSA) for the Angola-Namibia (ANNA) Interconnector project has been extended to February 2025.
- In May 2023, the Sustainable Energy Fund for Africa (SEFA) provided funding to update the Feasibility and Environmental Social Impact Assessment (ESIA) Studies for the ZIZABONA Interconnector project.
- The Technical Feasibility Study for Baynes Hydropower's Transmission Line component is in progress. The ESIA Inception Report and Multi-Criteria Determination Methods (MCDM) were validated in November 2023.

Figure 24: Proposed High-Priority Power Projects



- The Malawi-Mozambique transmission interconnector is expected to be commissioned in the last quarter of 2024.
- The financial close of the Zambia-Tanzania transmission interconnector, financed by the World Bank, is at an advanced stage.
- The commissioning of the 2,115 MW Julius Nyerere hydropower project in Tanzania has commenced, with the first unit of 235 MW commissioned in the first quarter of 2024.

Three Transmission Corridors, comprising eight priority interconnector and internal country transmission projects, have been identified: the Central (East–West) Corridor, the Central (North–South) Corridor, and the West (North–South) Corridor. The MaMo and RSNam projects are currently under construction.

4.3.5 Internet and Mobile Connectivity



The SADC average Internet penetration is 54%, an increase of four percentage points from 2023. Botswana, Eswatini, Mauritius, Seychelles, and South Africa surpass the RISDP 2030 target of 90%. Madagascar and Mozambique trail at 17% and 23% respectively. Figure 25 shows the subscribers per 100 inhabitants

Figure 25: Subscribers per 100 Inhabitants



Source: SADC ICT Observatory

The region has achieved an impressive 86.4% mobile network coverage by at least a 3G mobile network, against the RISDP 2030 target of 95%. The 4G mobile network coverage expansion reached 75% of population coverage in 2023, also against a 2030 target of 95%. The average mobile penetration in the region stands at 91%, reflecting significant strides in mobile cellular connectivity. Figure 26 shows the percentage of the population with 3G mobile network coverage.

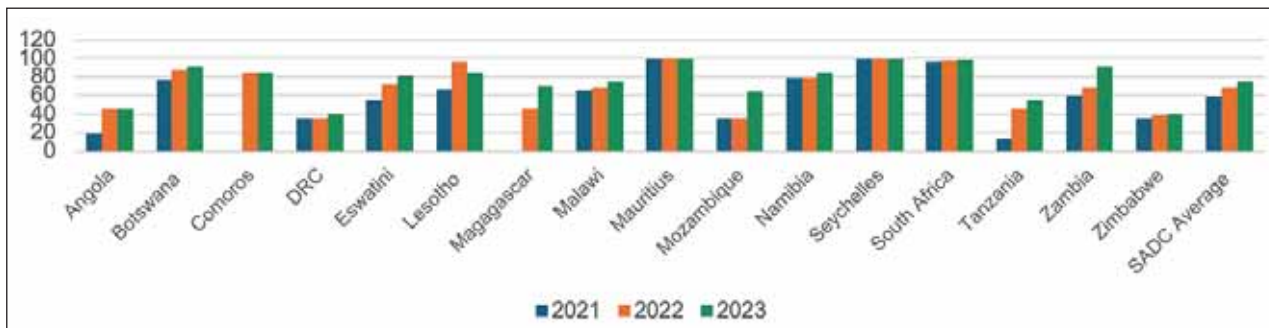
Figure 26: Percentage of Population with 3G Mobile Network Coverage



Source: SADC ICT Observatory

The region has significantly contributed to increasing broadband connectivity coverage and enhancing the cybersecurity landscape. Thirteen Member States have achieved the 2025 SADC Broadband Target to cover 80% of their population with broadband services and regional broadband interconnectivity. Figure 27 illustrates the population percentage with 4G mobile network coverage.

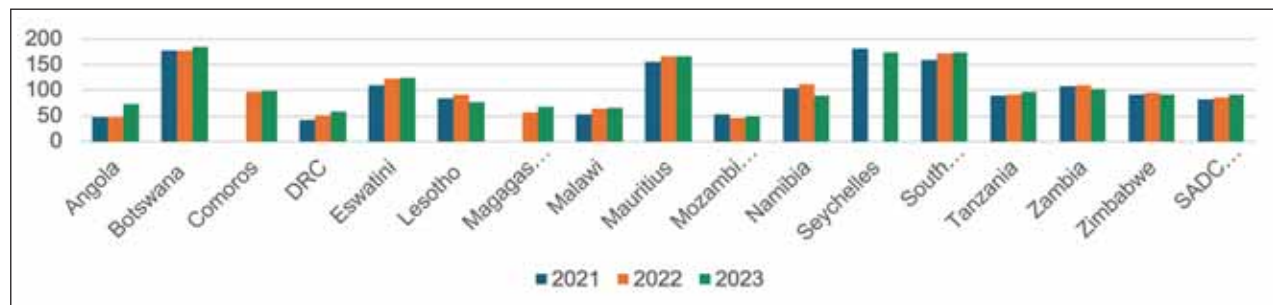
Figure 27: Percentage of Population with 4G Mobile Network Coverage



Source: SADC ICT Observatory

Six Member States have already achieved the RISDP 2030 target of 95% mobile network coverage. This progress is attributed to collaboration with mobile network operators and other stakeholders. The availability of 3G networks has significant implications for communication, digital inclusion, economic growth, and social development. Figure 28 shows mobile cellular subscribers per 100 inhabitants.

Figure 28: Mobile Cellular Subscribers per 100 Inhabitants:



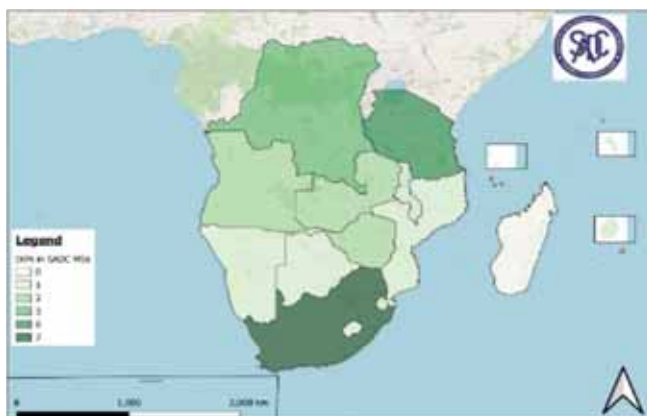
Source: SADC ICT Observatory



Mauritius, Seychelles, and South Africa have achieved the RISDP 2030 target of 95% for 4G coverage. Enhanced digital experience and productivity contribute to socio-economic development across healthcare, education, and agriculture sectors.

Eight Member States have surpassed the RISDP 2030 target of 95% mobile penetration, though mobile penetration rates among SADC countries vary widely, from 49% in Mozambique to 184% in Botswana. Nine Member States have migrated from Analogue to Digital Terrestrial Television (DTT), enabling more channels and improved quality. Fourteen Member States have active Internet Exchange Points (IXPs), with thirty IXPs accounting for 55% of Africa's IXPs. Twenty-two advanced IXPs in six Member States improve Internet access, reduce latency, and mitigate the impact of submarine cable cuts. Figure 29 highlights the SADC Internet Exchange Points (IXPs).

Figure 29: SADC Internet Exchange Points (IXPs)



SADC Member States with IXPs:	
1.	South Africa (7)
2.	Tanzania (6)
3.	DRC (3)
4.	Angola (2)
5.	Zambia (2)
6.	Zimbabwe (2)
7.	Botswana (1)
8.	Eswatini (1)
9.	Lesotho (1)
10.	Malawi (1)
11.	Mauritius (1)
12.	Mozambique (1)
13.	Namibia (1)
14.	Seychelles (1)

Source: SADC ICT Observatory

4.3.6 Strengthen Cybersecurity and Harmonise Legal Frameworks



Nine Member States (Botswana, Eswatini, Mauritius, Malawi, Mozambique, South Africa, United Republic of Tanzania, Zambia, and Zimbabwe) have an operational Computer Incident Response Team (CIRT) enforcing the SADC Harmonised Cyber Security Legal and Regulatory Framework. Five Member States (Angola, Mauritius, Mozambique, Namibia, and Zambia) have ratified the 2014 AU Convention on Cybersecurity and Personal Data Protection (Malabo Convention), effective June 2023. The SADC ICT Observatory Web Portal and Database System, now operational with data from 2021 to 2023, provides a comprehensive view of the entire SADC ICT Sector

4.3.7 Increase Access to Water and Sanitation

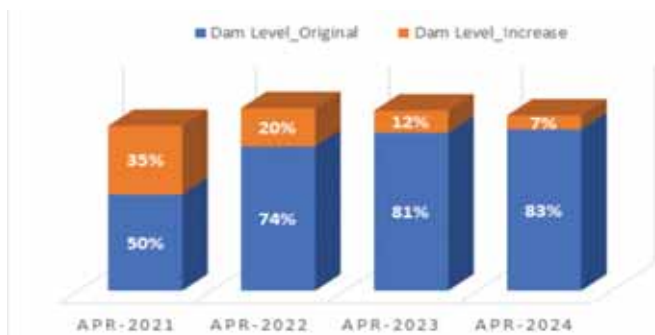


The region has made moderate progress in improving water access, supply, sanitation, and water governance. With an annual per capita withdrawal of 210 cubic meters, efforts to address freshwater scarcity continue. Currently, 63% of the population has access to safely managed water supplies, but only 37% have access to improved sanitation facilities, indicating a significant area for improvement.

Countries like Mauritius, Seychelles, Botswana, Namibia, and South Africa have improved water and sanitation through improved infrastructure, desalination plants, water recycling systems, and community-based water projects. Despite these advances, many other Member States face challenges in providing clean water and sanitation, particularly in rural and remote areas. Contributing factors include climate change, population growth, and inadequate infrastructure. Addressing these issues requires prioritising sustainable water management, infrastructure investment, and promoting sanitation access for all citizens. Seven functional River Basin Organisations (RBOs) have been established, with a target of 10 by 2030. Despite severe drought conditions due to El Nino, the region's dam levels averaged 90% capacity in 2023, thanks to significant rainfall in October and November 2023 and cautious dam operations.

Figure 30 illustrates a significant reduction in water collected by the region's dams over the past four years, with a slight 7% increase in 2024. This suggests that groundwater recharge was inadequate during the 2023/24 hydrological season, particularly in areas severely affected by El Nino.

Figure 30: Regional Dam Level Increase (Source: SADC, 2024)



Source: <https://www.zambezi.org/hydrology>

The region abstracts 53 km³ of water annually, constituting 2.2% of its renewable water resources. Of this abstracted water, 75% is used for irrigation, 15% for domestic purposes, and 10% for industrial use.

4.3.8 Enhance Meteorological Observation and Seasonal Forecasting



The region has made significant progress towards enhancing its network of meteorological observations. Namibia and South Africa have fully automated their synoptic observation networks. By 2023, the total number of standalone Automatic Weather Stations (AWS) across the region reached 257, approaching the target of 305 by 2030. Botswana, Lesotho, Zambia, and Zimbabwe are also installing additional AWSs to bolster the existing network.

Zimbabwe has procured 30 additional AWSs, Zambia is commissioning 120 more, and Comoros still needs to procure AWSs. Increasing the number of AWSs is crucial, as broader coverage enhances the accuracy of weather analyses and the reliability of data products collected by these monitoring platforms.

4.3.9 Improve the Efficiency of Transport Infrastructure and Services

The Regional Trunk Road Network (RTRN) has demonstrated relative strength, although its growth has slowed due to the adverse effects of the COVID-19 pandemic on infrastructure financing. Some sections of the RTRN's heavily trafficked roads require rehabilitation due to overloading and infrequent maintenance.



The Regional Road Network spans 1.4 million kilometres, close to the target of 1.5 million kilometres.

The total Regional Trunk Road Network stands at 65,000 kilometres, below the target of 85,000, indicating the need for continued expansion efforts. The RTRN has created essential links to strategic cities, production centres, and ports as part of the SADC multimodal transport corridors.

One-Stop Border Posts (OSBPs)

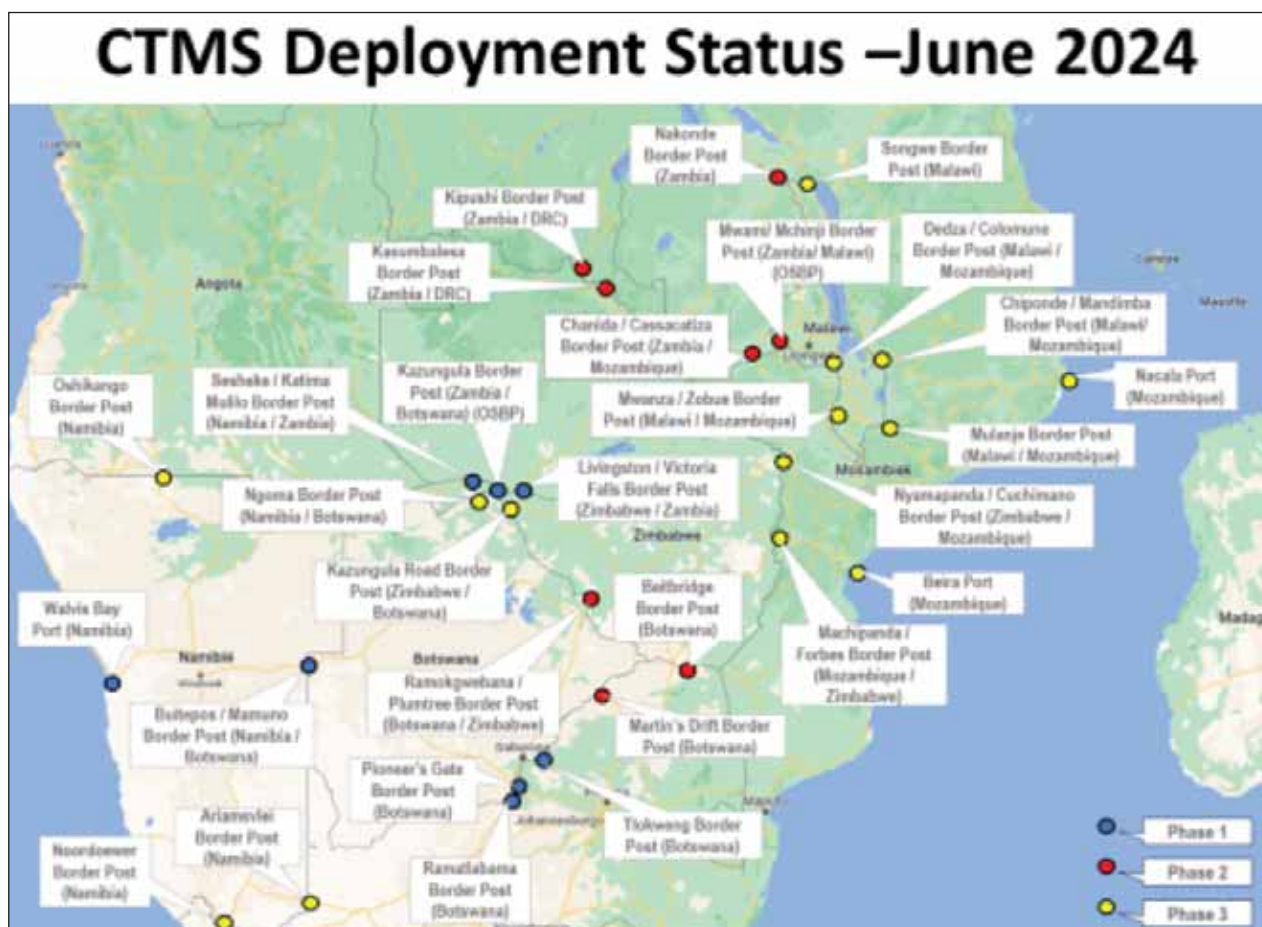
As shown in Table 5, out of 17 targeted One-Stop Border Posts (OSBPs), six (6) are operational, three (3) are under construction, and the remainder are in the planning phase. The Corridor Trip Monitoring System (CTMS) has been installed at 30 key border posts in Botswana, Malawi, Namibia, Zambia, Zimbabwe, and the Port of Walvis Bay to facilitate trade and transport. (see Figure 31). Deployment at Mozambique's borders and ports is in the planning stage. The efficiency and speed of movement of goods and services in the region are expected to increase.

Table 6: OSBP Construction Status

S/No	Border Post	Member States	Status/Stage
1	Chirundu	Zambia/Zimbabwe	operational
2	Kazungula	Botswana/Zambia	operational
3	Mwami/Mchinji	Zambia/Malawi	operational
4	Chiponde/Mandimba	Malawi/Mozambique	Construction-2024
5	Katima Mlilo/Sesheke	Namibia/Zambia	Planning
6	Mamuno/TransKalahari	Botswana/Namibia	Construction-2024
7	Pioneer/Skilpadhek	Botswana/SA	Planning
8	Maseru	SA/Lesotho	Planning
9	BeitBridge	SA/Zimbabwe	Construction/Zim side completed and operational
10	Ressano Garcia/Lembombo	SA/Mozambique	Planning
11	Ngwenya/Oshoek	SA/Eswatini	Planning
12	Kasumbalesa	Zambia/DRC	Planning
13	Tunduma/Nakonde	Zambia/URT	operational
14	Songwe/Kasumulo	URT/Malawi	construction
15	Zobue/Mwanza	Malawi/Mozambique	Operational
16	Dedza/Colomune	Malawi/Mozambique	Operational
17	Martins Drift/Groblers Brugge	SA/Botswana	Planning

Source: Survey by Infrastructure Directorate June 2024

Figure 31: Map- Deployment of the Corridor Trip Monitoring Systems [CTMS]



Source: SADC Secretariat Infrastructure Directorate

Corridor Agreements

The three Lobito Corridor Member States (Angola, DRC, and Zambia) have signed the Lobito Corridor Transit Transport Facilitation Agency Agreement. Angola and Zambia have ratified and deposited the ratification instruments with SADC. The North-South and Beira Corridors' agreements are currently being signed by beneficiary Corridor Member States. The Nacala Development Corridor Agreement was recently amended and ratified. The Trans Kalahari and Walvis Bay-Ndola-Lubumbashi agreements continue to be operational. The Central Corridor Transit Transport Facilitation Agency Agreement has now been expanded to include Malawi and Zambia, filling the vacuum left by the moribund Dar es Salaam Corridor Charter. This consolidation brings beneficiary Member States using the Port of Dar es Salaam under one Corridor Management Institution.

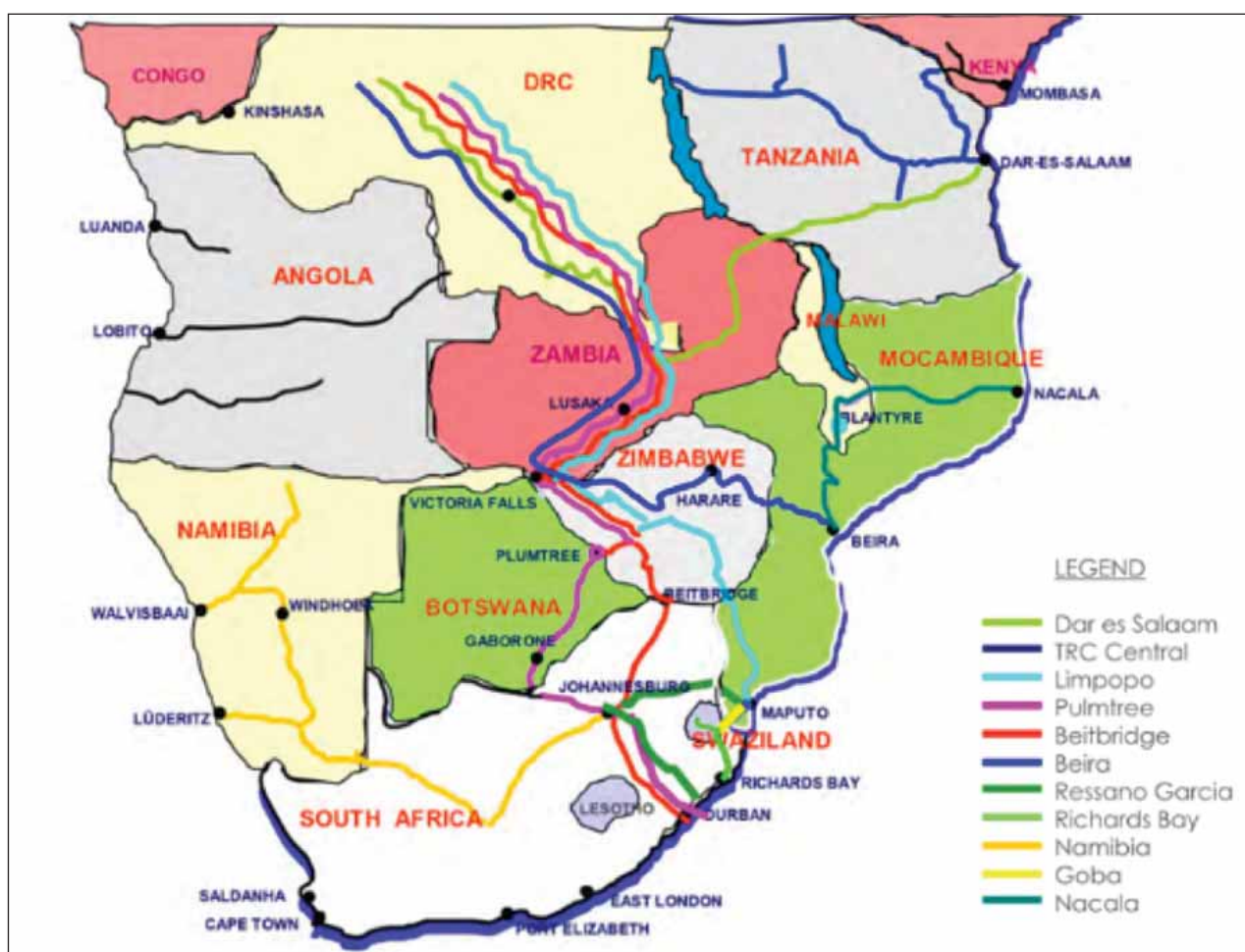
Regional Railway Network and Revitalisation Efforts

The SADC Total Regional Railway Network (RRN) spans 49,800 km, excluding the under-construction Standard Gauge Railway (SGR) in the United Republic of Tanzania, as shown in Figure 32 and in Table 6.

The Secretariat is developing a regional railway master plan, investment strategy, and a short sea shipping study. This master plan aims to coordinate railway sector reforms, focusing on governance, rehabilitation, construction of missing links, and harmonisation of design standards for interoperability.

Revitalising SADC railways is crucial to rebalancing the current unsustainable 80:20 modal split in favour of road transport. This imbalance leads to faster road deterioration due to the shift of rail-friendly cargo to road transport, causing congestion on crucial road corridors and ports. Radical policy and regulatory reforms are needed to transition from state-owned railways to Public-Private Partnership (PPP) models. These reforms will attract private sector investment and allow third-party operator access. Namibia, South Africa, the United Republic of Tanzania, and Zambia have begun this shift, which should be encouraged and replicated across the region.

Figure 32: Map - SADC International Regional Railway Network (RRN):



Source: Southern African Railway Association Secretariat

Table 7: Total Regional Railway Network (RRN) in the SADC Region (km)

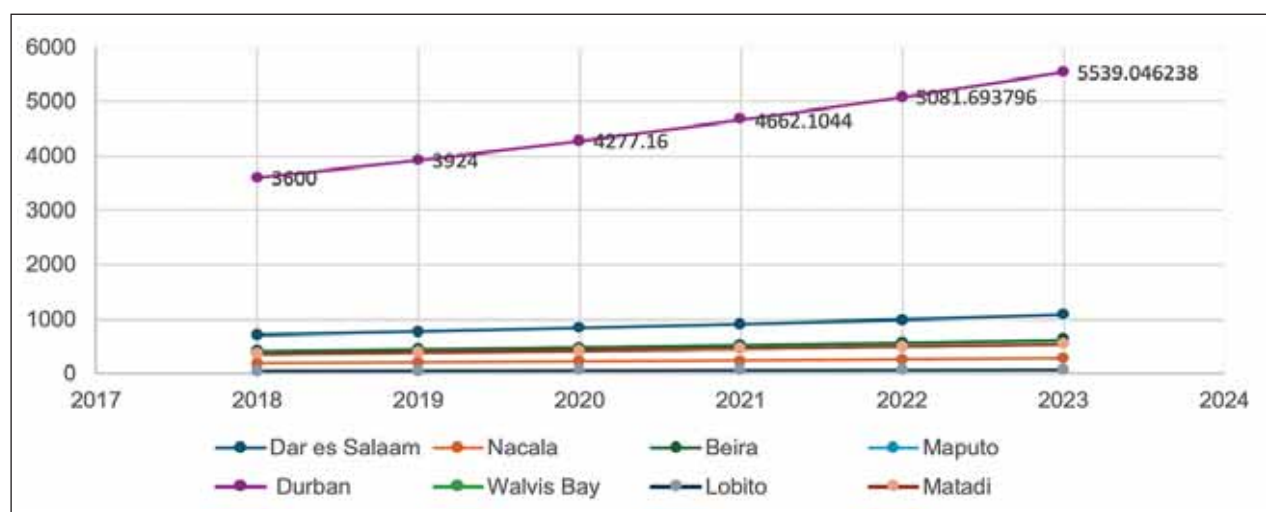
S/N Factor	1 Total Rail Network (km)	2 Country Land Area (square.km)	3 Rail network density (2/1)
South Africa	24,280	1,214,470	50
Botswana	888	566,730	638
Zimbabwe	2583	386,847	150
Zambia	2,133	752,618	353
DRC	4,007	2,267,048	566
Mozambique	4,787	786,380	164
Namibia	2,628	823,290	313
Malawi	767	94,080	123
U.R Tanzania	4,567	885,800	194
Angola	2,852	1,246,700	437
Eswatini	301	17,204	57
TOTAL	49,793	9,041,167	3045

Source: Southern African Railway Association Secretariat

Regional Ports

The RIDMP transport demand and supply have forecasted deficiencies in port capacity. The capacity changes for eight regional ports indicate moderate growth over the years, except Durban port, which saw a significant capacity increase from 3,600 to 5,530 in 2023, translating to a 54% increase. The growth in all the regional ports demonstrates ongoing investments and improvements in port infrastructure. However, further investments are required to meet demand and improve efficiency. Improving the port interface with road and rail transport is crucial, as it remains a significant source of delays and higher transport costs (see Figure 33).

Figure 33: SADC Percentage Change in Capacity of Regional Ports



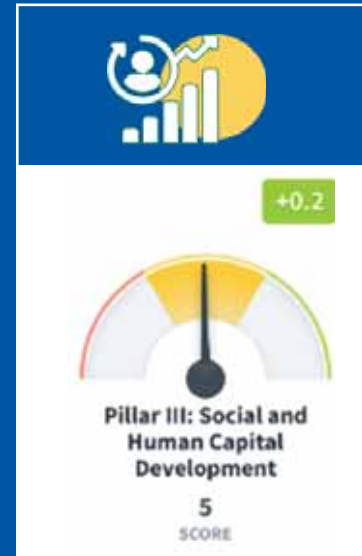
Source: Southern African Railway Association Secretariat

4.4 Pillar III: Social & Human Capital Development

Key Messages

Overall Performance: The region scored 4.5 in 2023/24.

- The average regional malaria incidents decreased by 3%.
- The region experienced multi-country cholera outbreak, resulting in 806,000 cases and 911,000 deaths.
- The annual number of TB deaths from 2016 to 2021 for 11 of the 16 SADC Member States.
- The prevalence of wasting in children under five years old has decreased from 5.2% in 2020 to 4.9 in 2023.
- The prevalence rate of overweight among children under five years of age, is 6,1% against the 5% target by 2025.
- Child Stunting prevalence decreased from 31% in 2020 to 26.6% in 2023. More than one in four children under five was stunted in 2023
- Angola, the Democratic Republic of Congo, and Tanzania, have a disproportionately high burden of childhood stunting.
- Anaemia prevalence remains high in all Member States, with women of reproductive age (15-49), averaging 32.5% from 2020 to 2023.
- An estimated 13.2 million persons out of the 140.6 million persons of region's labour force is unemployed, and the youth unemployment rate is 12.5%.
- Child Labour was 20,7% while labour force participation by citizenship was 67,5%. Lesotho recorded the highest Child labour at 31.9%, with the rates for boys being considerably higher seven Member States.
- 13 Member States have a National Qualification Framework that aligns with the SADC Qualification Framework.



4.4.1 Eliminate the Incidence of Cholera



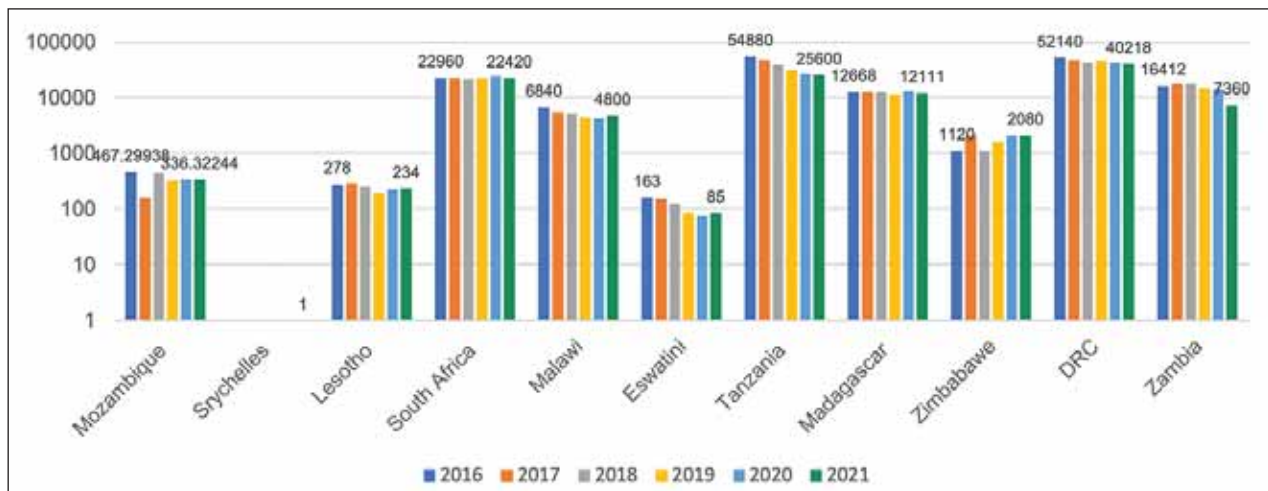
The region has grappled with a multi-country cholera outbreak since the first semester of 2023, exacerbated by drought-induced use of unsafe water sources. The outbreak has resulted in 806,000 cases and 911,000 deaths. The DRC has reported nearly 1,000 new cases weekly, while Zimbabwe has experienced cases in specific areas. Mozambique has seen new cases and wider geographical spread, and Zambia has reported active cholera outbreaks.

4.4.2 Reduce the Incidence and Death from Tuberculosis

The region experienced a general downward trend in tuberculosis (TB) incidence from 2016 to 2022. Six countries—Angola, Botswana, Eswatini, Mozambique, South Africa, and the United Republic of Tanzania—significantly reduced TB incidence by 30% to 47%, while DRC and Zimbabwe saw a marginal decrease of 2%. Despite reducing TB case notifications during COVID-19, 2022 witnessed a significant rise in reported TB cases across Member States.

As shown in Figure 34, the annual number of TB deaths has also decreased for 11 of the 16 SADC Member States from 2016 to 2021. DRC, South Africa, and Tanzania consistently recorded the highest annual number of TB deaths, whereas Eswatini and Lesotho had relatively fewer deaths. Overall, intensified efforts are required to reduce TB deaths in the region further.

Figure 34: Annual TB Deaths by Member States, 2016-2021



Source: Data presented in this section only covers 11 of the 16 SADC countries (Mozambique, Seychelles, Lesotho, South Africa, Malawi, Eswatini, Tanzania, Madagascar, Zimbabwe, Zambia and DRC).

4.4.3 Reduce the Incidence and Death from Malaria

The region is making steady progress in reducing malaria incidence and deaths. The average regional incidence decreased from 171 cases per 1000 population in 2021 to 166 cases per 1000 in 2022, and the mortality rate dropped by 10.5%. Despite this progress, several countries in the region are expected to miss their malaria milestone targets for 2025.



In 2022, approximately 83% of the estimated 380 million people in the region lived in malaria-endemic areas. High malaria-burdened countries include Angola, DRC, Madagascar, Malawi, Mozambique, mainland Tanzania, Zambia, and Zimbabwe. Other countries, such as Botswana, Comoros, Eswatini, Namibia, South Africa, and Zanzibar in Tanzania, are considered low incidence and are close to eliminating malaria. Refer to Table 7 for detailed data on malaria cases and incidence by Member State.

Table 8: Malaria Cases and Incidence by Member State, 2022

Member States	Cases	% Contribution	Incidence	Rank (Incidence)
DRC	29,400,117	44.01%	245.5	4
Mozambique	12,405,868	18.57%	392.4	1
Angola	9,231,031	13.82%	279	3
Zambia	6,150,176	9.21%	313.62	2
Malawi	4,257,729	6.37%	220.02	5
U.R Tanzania (Mainland)	3,484,408	5.22%	55.14	7
Madagascar	1,690,469	2.53%	58.21	6
Zimbabwe	141,076	0.21%	8.31	9
Comoros	20,681	0.03%	22.8	8
Namibia	11,849	0.02%	4.48	10
South Africa	7,281	0.01%	0.12	14
U.R Tanzania (Zanzibar)	4,185	0.01%	2.22	11
Botswana	446	0.00%	0.18	13
Eswatini	354	0.00%	0.33	12
Mauritius	99	0.00%	0.078	15
Seychelles	-	0.00%	0	16
SADC	6,805,769		165.7	

Source: <https://www.who.int/teams>

The average regional malaria mortality rate decreased from 13.4 per 100,000 cases in 2021 to 10.5 in 2022. DRC (57%) and Angola (29%) contributed 86% of total malaria deaths in the region. Refer to Table 8 for detailed data on malaria deaths and mortality rates by Member State.

Table 9: SADC Malaria Deaths and Mortality rates, 2022

Member States	Cases	% Contribution	Incidence	Rank (Incidence)
DRC	29,400,117	44.01%	245.50	4
Mozambique	12,405,868	18.57%	392.40	1
Angola	9,231,031	13.82%	279.00	3
Zambia	6,150,176	9.21%	313.62	2
Malawi	4,257,729	6.37%	220.02	5
U.R Tanzania (Mainland)	3,484,408	5.22%	55.14	7
Madagascar	1,690,469	2.53%	58.21	6
Zimbabwe	141,076	0.21%	8.31	9
Comoros	20,681	0.03%	22.80	8
Namibia	11,849	0.02%	4.48	10
South Africa	7,281	0.01%	0.12	14
U.R Tanzania (Zanzibar)	4,185	0.01%	2.22	11
Botswana	446	0.00%	0.18	13
Eswatini	354	0.00%	0.33	12
Mauritius	99	0.00%	0.08	15
Seychelles	-	0.00%	0.00	16
SADC	6,805,769		165.7	

Source: <https://www.who.int/teams/global>

4.4.4 Improve Nutrition and Other Health Outcomes

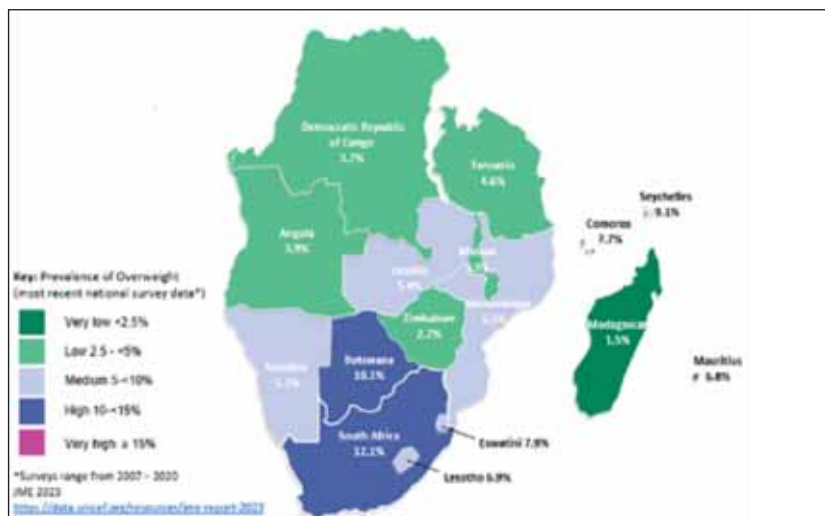
This scorecard shows an overall average performance on nutrition policies and programmes, including wasting, overweight, exclusive breastfeeding, and stunting indicators.



Prevalence of Wasting

The prevalence of wasting in children under five years old has decreased from 5.2% in 2020 to 4.9% in 2023. However, there was a slight increase of 0.1% from 2022 to 2023, but this remains within the target of less than 5% by 2025.

Figure 35: Prevalence of Overweight Among Children Under Five Years of Age



Overweight and Obesity

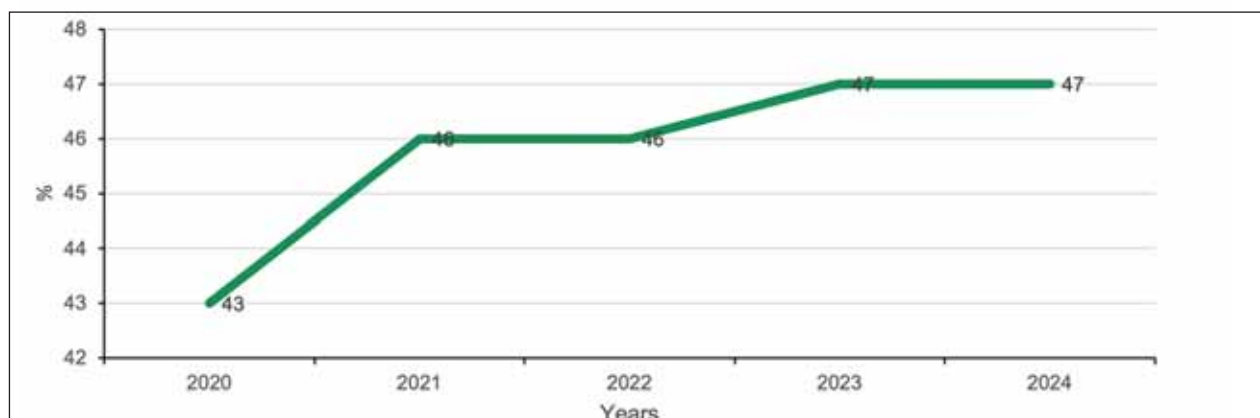
Overweight and obesity have been rising in many countries due to industry-led marketing and greater access to highly processed foods. An estimated 2.4 million children under five are overweight. The SADC region has a prevalence rate of 6.1% for overweight children under five, which is above the target of less than 5% by 2025. This rate has persisted for the past four years, indicating a growing challenge of obesity among adults and young children in the region. (see Figure 35)

Source: Joint Child Malnutrition Estimates (JME) 2023 edition

Status of Exclusive Breastfeeding

Figure 36 shows that exclusive breastfeeding rates in the SADC region have improved slightly from 43% to 47%. This indicates progress toward the 2025 target of at least 50% of children receiving only breastmilk in the first six months of life. Studies suggest that breastfeeding could save 13% of all deaths of children under five annually.

Figure 36: Exclusive Breast-Feeding Rates for Children Below 6 Months of Age and Below

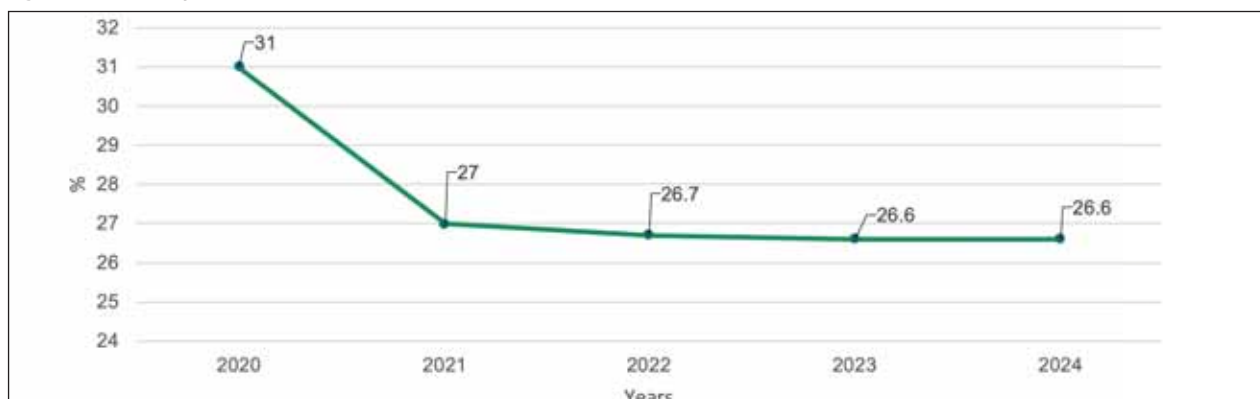


Source: UNICEF. The State of the World’s Children 2023

Prevalence of Stunting

The region is making progress in reducing stunting, with prevalence decreasing from 31% in 2020 to 26.6%, as shown in Figure 37. However, the improvement rate slowed after 2021, with only minor changes projected between 2022 and date. Despite the projected decrease, a rate of 26.6% indicates that more than one in four children under five will be stunted in 2023, highlighting the need for continued efforts to improve child nutrition and health outcomes.

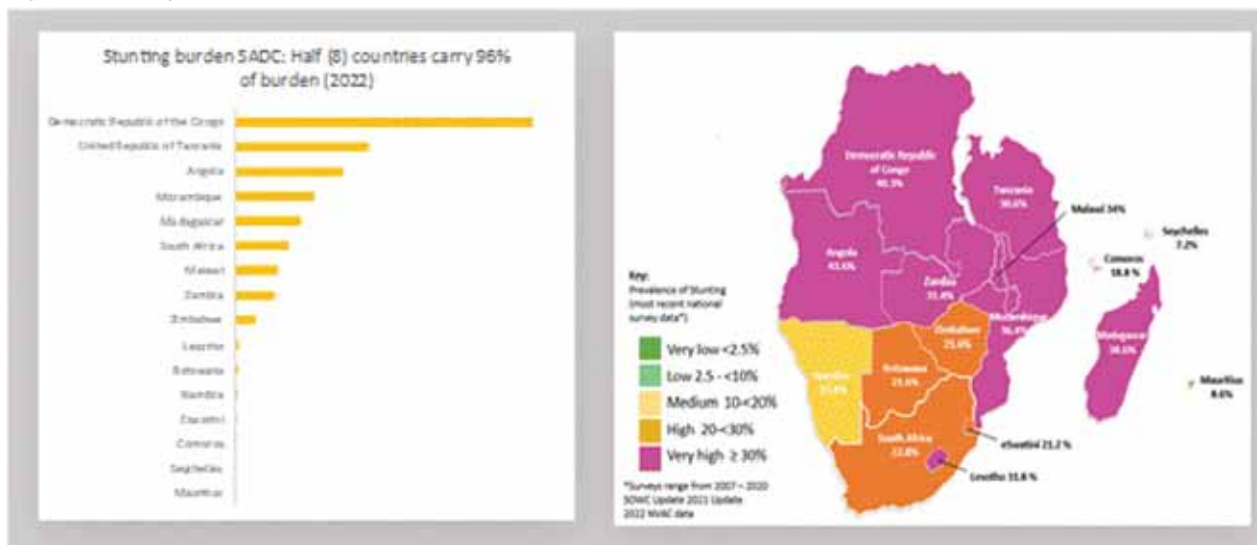
Figure 37: Percentage of Children Under Five Years Old Who are Stunted 2020-2024



Source: Joint Child Malnutrition Estimates (JME) 2020-2023 edition

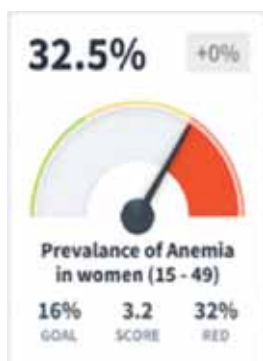
Half of the SADC Member States, particularly Angola, Democratic Republic of Congo, and Tanzania, have a disproportionately high burden of childhood stunting, with a prevalence rate exceeding 30% across much of the region, as shown in Figure 38. Only a few countries, such as Seychelles and Mauritius, have low or very low prevalence rates. The high stunting burden highlights the need to address this widespread and disproportionate challenge.

Figure 38: Stunting Burden in SADC



Source: Joint Child Malnutrition Estimates (JME) 2023 edition

Prevalence of Anaemia



The prevalence of anaemia remains high in all Member States. Among women of reproductive age (15-49), the prevalence has averaged 32.5% over the five years from 2020 to 2024. Failure to reduce anaemia may result in millions of women experiencing impaired health and poor quality of life.

SADC continues to play a crucial role in regional coordination and advocacy for mandatory food fortification of strategic food vehicles like mealie meal, cooking oil, and salt. Eight countries have enacted compulsory legislation of wheat flour fortification, while others are developing their national strategies, policies, and standards.

4.4.5 Reduce Unemployment

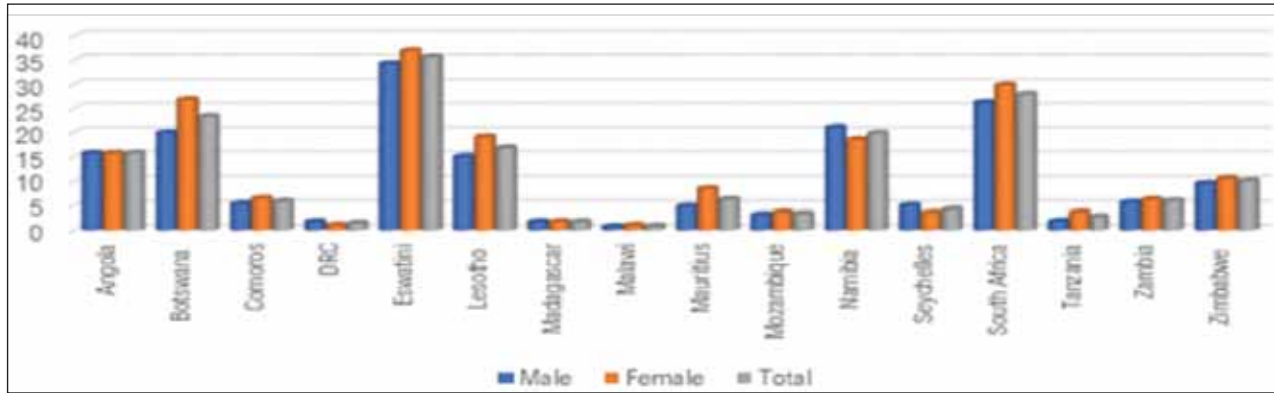
The unemployment rate in the SADC region remains a challenge, standing at 9.4%, an increase of 0.2% from the previous year. This rise was exacerbated by the COVID-19 pandemic, which led to massive job losses, particularly affecting women and youth. Currently at 12.5%, youth unemployment is a significant problem in Member States due to the large youth population.



Unemployment Rate by Member State

SADC's labour force comprises 140.6 million individuals, either employed or seeking jobs. Unemployment rates among this pool have been tracked from 2013 to 2023. Figure 39 shows that in most SADC Member States (12 out of 16), female unemployment rates are higher than male rates, with Angola, DRC, Seychelles, and Namibia being the exceptions.

Figure 39: Unemployment Rate in SADC Member States, 2024



Source: Data submitted by Member States to ILOSTAT

Employment Shares by Economic Sector in SADC

This scorecard indicates that SADC is not on track to meet the employment-related targets set in the SADC Industrialisation Strategy and Roadmap (SISR) (2015-2063). The industrial employment share has stagnated at around 11%, far below the SISR 2030 target of 40%. Minimal transformation has been achieved over the years, resulting in little progress in transitioning from lower productivity to higher productivity economies. Employment shares by economic sector saw minimal change between 1991 and 2021.



SADC is promoting the implementation of pro-employment macroeconomic policies and sectoral strategies to create more employment opportunities, especially for youth. To date, 11 Member States (Botswana, Comoros, DRC, Madagascar, Malawi, Mozambique, Namibia, Seychelles, United Republic of Tanzania, Zambia, and Zimbabwe) are implementing national employment policies, with others at various development stages.

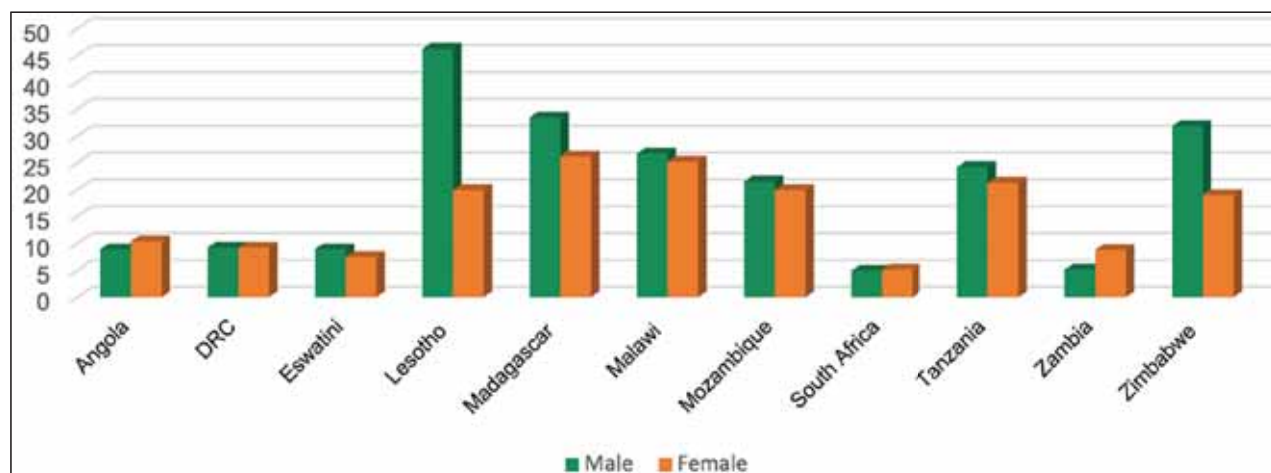
Incidence of Child Labour in the Region



SADC faces a significant child labour challenge, with a score of 20.7%. Child labour is prevalent in agriculture, informal sectors, domestic work, mining, construction, tourism, and hospitality. The proportion of children aged 5-17 years in child labour varies from 5% in South Africa to 31.9% in Lesotho, with boys generally having higher rates across most Member States.

Member States have made notable strides to protect children through the SADC Code of Conduct on Child Labour. Most Member States have set the legislated minimum age for employment at 15 years and aligned it with the age for completing compulsory education.

Figure 40: Child Labour in SADC Member States (5-17 years), 2024



Source: SADC Secretariat Child Labour Score Card, 2024

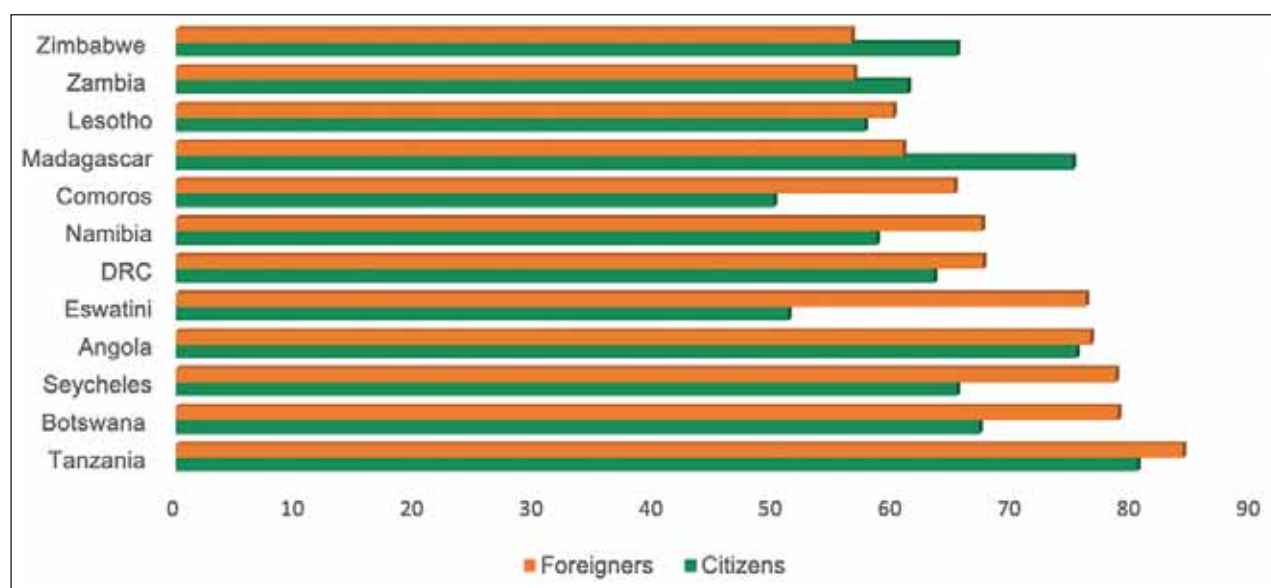
Labour Force Participation Rate for Migrant Workers



The current labour force participation rate for migrant workers in the region is 67.5%, up from 66.5% in 2020.

Figure 41 illustrates that in nine of the 12 Member States, foreigners have a higher labour force participation rate than nationals. Migrant workers are more readily available to supply their labour for producing goods and services, with significant discrepancies observed in Botswana (11.6%), Comoros (15.1%), Eswatini (24.9%), and Seychelles (13.3%). Madagascar, however, shows a high discrepancy of 14.2% in favour of citizens.

Figure 41: Labour Force Participation Rate by Citizenship Status



Source: Data submitted by Member States to ILOSTAT

4.4.6 Improve Access to Education

Implementation of the SADC Qualifications Framework



More than 80% of SADC Member States have developed their national qualifications frameworks in alignment with the SADC Qualifications Framework (SADCQF) approved in 2016. Recently, Member States have endorsed transitioning from aligning their national qualifications frameworks to referencing them against the SADCQF. This new approach is expected to accelerate the harmonisation of regional qualifications.

SADC University of Transformation

The region is making progress toward establishing and operationalising the SADC University of Transformation (SUT). A Fellowship Programme on Industrial Pharmacy is being developed, focusing on one of the region's priority value chains and involving the industry and higher education institutions.

SADC Technical and Vocational Education and Training (TVET)

Milestones realised in the implementation of SADC Technical and Vocational Education and Training (TVET) include the development of the TVET Policy Framework and Strategy (2018-2027) and the new Monitoring and Evaluation Framework accompanying the Strategic Plan and Implementation Framework.

Promoting a Culture of Data for Better Education Policy Prescriptions

Data on various SDG4 indicators, such as enrolment ratios for primary, secondary, tertiary, and TVET sectors, is limited, hindering the development of informed policy measures. Several initiatives are underway to address this, including developing the SADC Higher Education Database, incorporating Education and Skills Indicators in the SADC Labour Market Information System currently being developed, and conducting a baseline study on Foundational Literacy and Numeracy.

4.5 Cross-Cutting Issues

Key Messages

Overall Performance: The region scored 5.1 in 2023/24.

- No Member State has achieved gender parity in Parliament, Management, and Judiciary despite progress compared to the previous year. Namibia and South Africa maintained gender parity in the Executive.
- Regional performance on women's representation in leadership positions of State-Owned Enterprises stands at 25%.
- Parliamentary Representation: Women hold 31% of seats, an increase of 0.9% from last year.
- Ambassadorial Representation: Women constitute 29%, up by 0.4% from last year.
- Executive Representation: Women make up 32%, a decrease of 1.6% from last year.
- There has been a 7.2% reduction in total reported GBV cases in the region.
- Women and girls comprise about 80% of victims reported GBV cases.
- The forest land area has increased by 5%, covering 412,129 hectares, and is nearing the 500,000-hectare target by 2030.
- The change rate in total forest area in SADC was -14.4% in 2023, better than the -20.4% target by 2030.
- Fish catch and aquaculture production have increased by over 50% from 2,3 million tons in 2019 to 3,1 million tons in 2023.



4.5.1 Promote Gender Equality in the Region

Increased Gender Parity in SADC Member States

The region remains seized with improving gender parity to increase women's participation in leadership and decision-making positions. While some Member States have made significant progress, others still need to improve. As shown in Table 10, Namibia improved from 27% in 2018 to 55% in 2022. South Africa has consistently maintained around 50% female representation. Countries like Botswana, the Democratic Republic of Congo, Eswatini, Malawi, Mauritius, Seychelles, and Zambia generally have lower percentages, with Lesotho and Zambia showing fluctuating trends.

Table 10: Gender Parity Per Member State

Member States	2018	2019	2020	2021	2022
Angola	23.0	39	33.0	33.3	33.3
Botswana	16.7	14.2	17.9	17.9	21.4
Comoros	n/a	NDP	NDP	-NDP-	NDP
DRC	10.4	20	20.0	27	28.6
Eswatini	26.0	30.0	30	29	37
Lesotho	18.0	32.1	NDP	16	NDP
Madagascar	20	NDP	NDP	34	36,7
Malawi	15	15	15.0	38.7	41.0

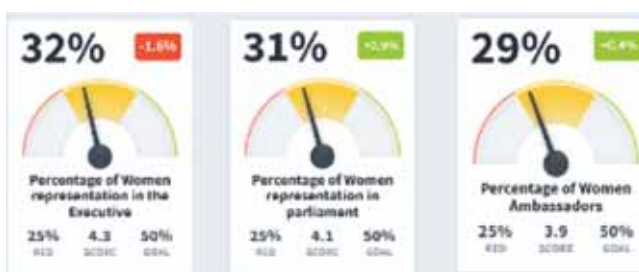
Member States	2018	2019	2020	2021	2022
Mauritius	8.3	13.0	14.3	14	14.3
Mozambique	27.0	32.0	47.7	33	47.5
Namibia	27.0	23.0	53	34.6	55.0
Seychelles	31.0	50.0	38.0	38.4	42.0
South Africa	48.6	50.0	50	50	50.8
Tanzania	34.0	18.0	23.1	30.4	28.3
Zambia	25.0	33.9	30.0	16	16.7
Zimbabwe	18.0	30.0	23.3	27	21.4

Source: Record of Ministers Responsible for Gender/Women's Affairs – DRC, 02 June 2023

Women in the Executive, Parliamentary and Ambassadorial Positions

The region's performance in facilitating gender parity at the Executive, Parliamentary, and Ambassadorial levels remains low, with some progress noted:

- Parliamentary Representation: Women hold 31% of seats, an increase of 0.9% from last year.
- Ambassadorial Representation: Women constitute 29%, up by 0.4% from last year.
- Executive Representation: Women make up 32%, a decrease of 1.6% from last year.



In 2021, only seven Member States (Angola, Eswatini, Mozambique, Namibia, South Africa, Tanzania, and Zimbabwe) achieved 30% or more women's representation in parliament. In 2022, Eswatini and Zimbabwe dropped below 40%, while Seychelles improved from 23% to 30%. Namibia, Mozambique, and South Africa maintained around 40%. No Member State achieved 50% or more women's representation in parliament.

Table 11: Women's Representation in Parliament 2018-2022 (%)

Member States	2018	2019	2020	2021	2022
Angola	36.8	30.5	29.6	29.6	38.1
Botswana	9.5	9.5	11.0	11.1	11.0
Comoros	-	-	NDP	16.7	-
DRC	9.5	NDP	11.5	12.8 (L); 23.9 (U)	13.3 (L); 19(U)
Eswatini	15.4	22.0	22	12.2 (L); 40.0 (U)	23
Lesotho	14.7	23.3	NDP	24.4 (L); 21.2 (U)	27
Madagascar	20.5	NDP	NDP	18.5 (L); 11.1 (U)	17.9
Malawi	16.7	16.7	16.7	22.9	21.2

Member States	2018	2019	2020	2021	2022
Mauritius	11.4	11.8	20.0	20.0	20.0
Mozambique	39.6	39.2	43.3	42.4	43.0
Namibia	41.3	46.0	44.0	44.2 (L); 14.3 (U)	44.0 (L); 14.3 (U)
Seychelles	22.0	21	23.0	22.9	30.0
South Africa	41.7	46.1	46.0	46.7 (L); 37.0 (U)	46.2
Tanzania	36	37	35.4	36.9	37.7
Zambia	10.0	18.9	16.9	15.1	15.0
Zimbabwe	36.8	34.2	31.5	30.6 (L); 44.2 (U)	31.4

Source: Record of Ministers Responsible for Gender/Women's Affairs – DRC, 02 June 2023.

Women in Permanent Secretary, Principal Secretary, Director General and Executive Director Positions

Women's representation in Management increased to 32%, a 0.3% rise from last year, at the Permanent Secretary, Principal Secretary, Director General, and Executive Director levels. Women Directors in the Public Sector reached 42%, up 7.8%, while Women CEOs/General Managers in State-Owned Enterprises rose to 25%, a 3.3% increase. Despite these gains, Women Deputy Permanent/Principal Secretary and Director levels are at 42%, a 3.2% decrease from last year.



Eswatini, Mauritius, and Seychelles achieved gender parity, reporting 100% representation of women in this category. Although no Member State reached gender parity at the Director level, Botswana, Mauritius, and South Africa reported more than 40% of women at the Director level in the public sector.

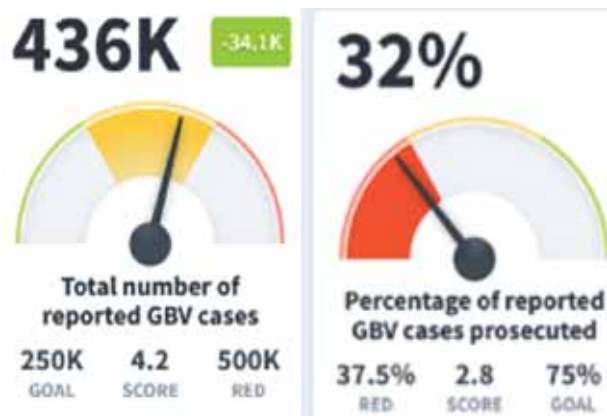
Women in the Judiciary

The region performed poorly in women's representation in the Judiciary compared to last year. Women Presidents of Court stand at 32%, a decline of 18.3%. Women Judges are at 27%, a decrease of 15.3%, and Women Magistrates are at 37%, a decrease of 10.1%.



However, significant strides have been made over the past five years. Eswatini, Lesotho, Madagascar, Mauritius, and Zambia achieved over 50% representation of women judges, although Lesotho dropped below 50% in 2022. At the magistrate level, Botswana, Mauritius, Namibia, Seychelles, and South Africa attained gender parity. Mauritius continues to lead the region with exceptional performance, maintaining over 50% women’s representation across all judiciary categories.

Gender-Based Violence in the Region

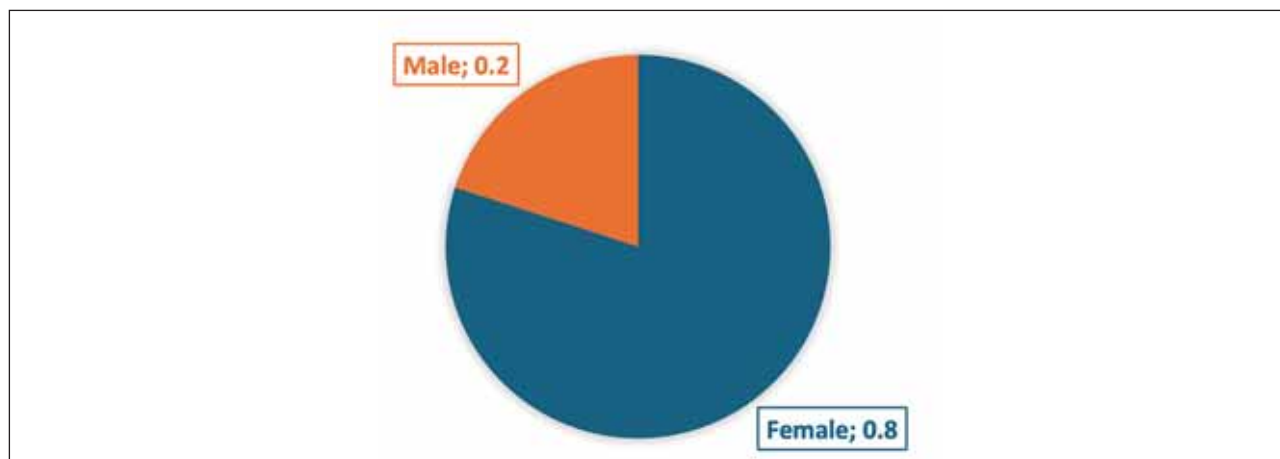


SADC considers Gender-Based Violence (GBV) a critical area of concern. The region's reported GBV cases decreased from 469,947 in 2022 to 435,872 in 2023. This reduction may be due to a decline in GBV cases at the national level, the effectiveness of GBV prevention interventions, inadequate data submitted by Member States, or lack of reporting by some Member States.

Share of Reported GBV Cases by Sex, 2023

In 2023, the region continued to face substantial gender disparity in reported GBV cases, with women and girls comprising about 80% of the victims. The total number of prosecuted GBV cases in 2022 was 149,143, representing only 32% of reported cases. Only Botswana, Mozambique, and South Africa had prosecution rates above 65%, while other Member States reported rates below 25%, with the lowest at 2%. This data highlights Member States' challenges in prosecuting GBV cases and accurately computing prosecution data.

Figure 42: Percentage Share of Reported GBV Cases by Sex, 2023



Source: Record of Ministers Responsible for Gender/Women’s Affairs – DRC, 02 June 2023.

Manage and Respond to Disasters in the Region

4.3

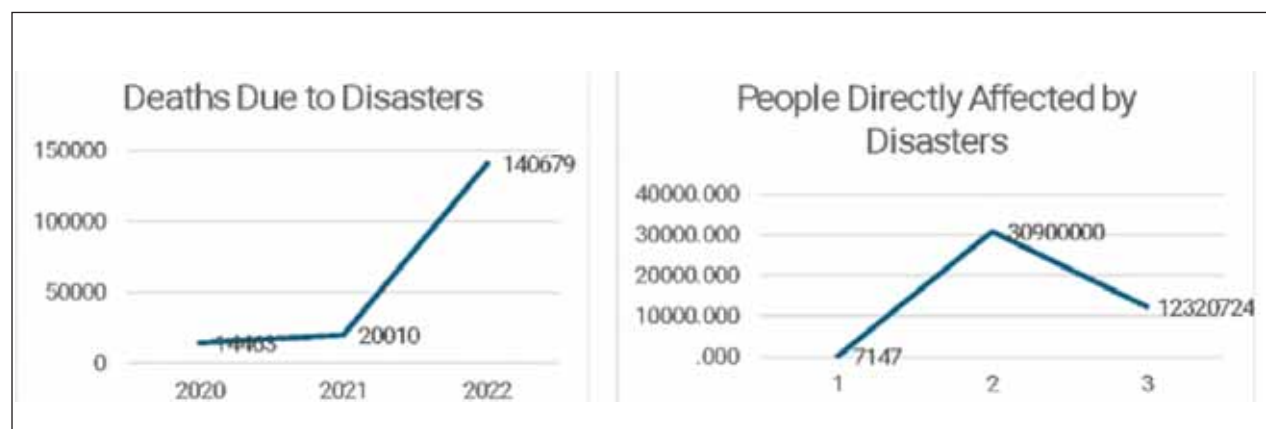
+0.1



The SADC Region Inform Risk Score increased from 4.1 in 2020 to 4.3 in 2022 due to the region's exposure to various disasters, including droughts, tropical cyclones, floods, landslides, wildfires, and rising sea levels. In December 2023, Seychelles declared a state of disaster following an explosion in an industrial area caused by heavy rains, which resulted in three deaths and significant infrastructure damage.

During the 2023/24 cyclone season, starting in October 2023, SADC experienced four tropical cyclones: Alvaro, Belal, Filipino, and Gamane. Tropical Cyclone Filipino, which made landfall in March 2023 in northern Mozambique, affected 57,551 people, resulting in two deaths and 85 injuries. The cyclone partially destroyed 1,674 houses, wholly destroyed 456, and flooded 9,279. Tropical Cyclone Gamane affected 89,465 people from 22,189 households in Madagascar, killing 19 people and forcing 22,615 people to seek refuge in 78 communal facilities.

Figure 43: Deaths due to Diseases and People Affected by Disasters in the SADC Region, 2020 - 2022



Source: Synthesis Report on the State of Food and Nutrition Security and Vulnerability in the Southern Africa, Regional Vulnerability Assessment and Analysis (RVAA) Programme, SADC, 2023

El Nino-Induced Drought

During the 2023/24 season, an El Nino-induced drought experienced in the region led to Malawi, Zambia, and Zimbabwe declaring national drought disasters. Madagascar was declared a national disaster due to a combination of drought in the south and damage from tropical cyclones and floods. Eswatini, Lesotho, Malawi, Mozambique, and Tanzania experienced significant flooding, causing extensive infrastructure and property damage. SADC prepared a Regional Appeal for Humanitarian Assistance, launched by the SADC Chairperson, His Excellency João Lourenço, President of the Republic of Angola, on 20 May 2024.

Climate Change Adaptation and Mitigation



The implementation of the Revised SADC Climate Change Strategy and Action Plan (CCSAP) and the GCCA+ Programme demonstrate efforts towards achieving the target of climate resilience and reduced emissions in 16 Member States by 2030. The alignment with international agreements and the development of national action plans contribute to regional climate resilience.

According to the scorecard, five Member States are implementing Climate Smart initiatives. To ensure that Climate Smart initiatives are rolled out to all Member States in the region, tools, guidelines, and standards are being developed for implementing multilateral environment agreements. To consolidate these efforts, SADC collaborates with partners like FAO and the World Bank to enhance climate change resilience and mitigation strategies. By aligning with initiatives such as the SADC Drought Risk Management and Mitigation Strategy, the region addresses climate hazards and reduces the severity of their impacts.

Protect and Management Natural Resources



As of March 2024, the forest land area is 412,129 hectares, nearing the 2030 target of 500,000 hectares. This increase is due to implementing the SADC Forestry Strategy 2020-2030 and coordinating forestry-related activities. SADC's strategies and projects have contributed to mitigating further forest loss. However, the -14.4% change rate in the total forest area indicates that Member States must develop mechanisms to address deforestation in the region

Contribution of Wildlife to the Regional Economy

The scorecard indicates that the wildlife-based economy currently contributes 4.6% to the region's GDP, showing progress towards the 6% target by 2030. As of March 2024, fifteen Member States have adopted the wildlife-based economy strategy. The development and endorsement of this strategy framework and significant adoption progress have contributed to this increase in GDP contribution from the wildlife-based economy.



Established Trans-Frontier Conservation Areas

The scorecard shows that the number of operational Trans-Frontier Conservation Areas (TFCAs) in the region increased to 12 out of the targeted 16 by March 2024, with 15 Member States currently implementing TFCAs. Supported by the SADC TFCA Programme and various funding sources, including the SADC TFCA Financing Facility, these efforts highlight a strong commitment to regional conservation initiatives.

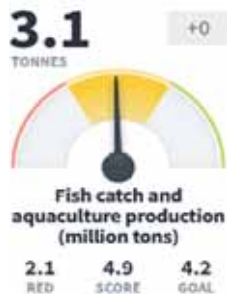


SADC Law Enforcement and Anti-Poaching (LEAP)

Fifteen Member States have adopted the SADC Law Enforcement and Anti-Poaching (LEAP) Strategy, which aids in conserving threatened species, combating wildlife crime, and enhancing law enforcement across the region.

Fish Catch and Aquaculture Production

Fish catch and aquaculture production rose from 2.3 million tons in 2019 to 3.1 million tons in 2023. The SADC PROFISHBLUE Project contributed to this increase by promoting sustainable resource utilisation through capacity building, research, and developing aquaculture value chains across SADC Member States.



Illegal, Unreported and Unregulated Fishing

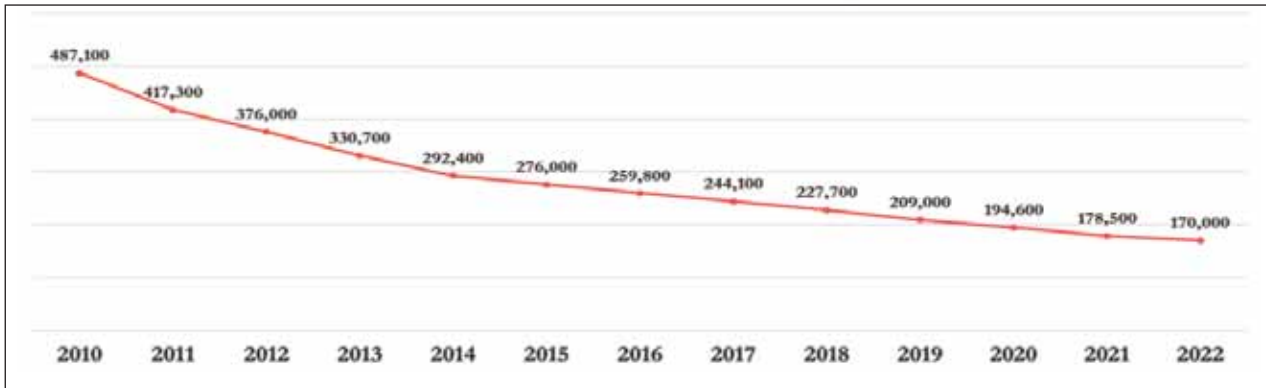
The Illegal, Unreported and Unregulated (IUU) fishing index has remained relatively stable over the years, with a slight decrease by an IUU index of 0.1 from 2.30 in 2019 to 2.29 in 2024, as presented in the scorecard below.



End HIV and AIDS

The region is making significant progress in reducing HIV/AIDS prevalence, with cases dropping from 868,000 in 2010 to 413,600 in 2022. Between 2010 and 2022, AIDS-related deaths declined by 65%, and new HIV infections decreased by 57%. However, youth remain the most affected, with 4,000 new infections each week.

Figure 44: Number of AIDS-Related Deaths in the SADC Region, 2010 - 2022



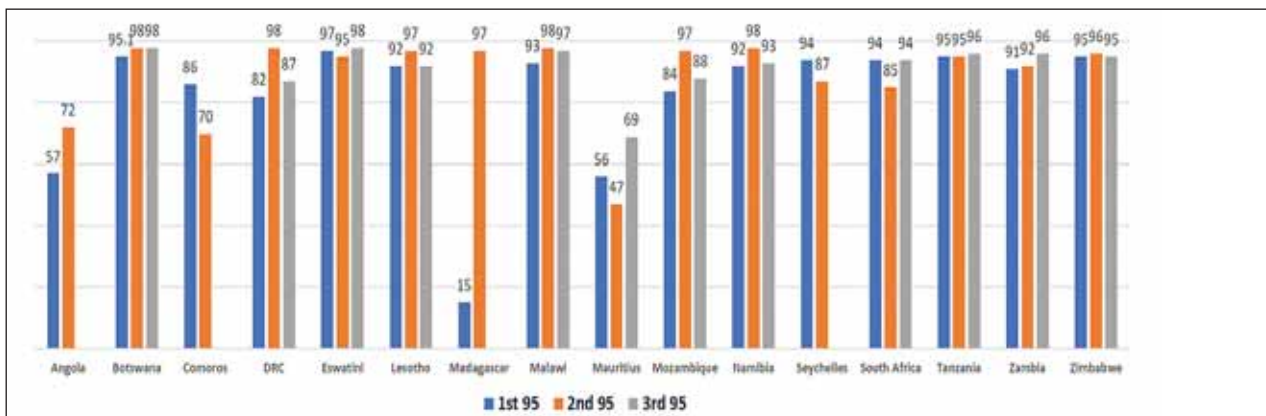
Source: <https://www.who.int/data/gho/data/indicators/indicator-details/GHO/number-of-deaths-due-to-hiv-aids>

95-95-95 UNAIDS GOAL

Currently, 77% of people living with HIV know their status, a 4% decrease from last year's 81%. ART coverage increased by 8%, reaching 80%, compared to 72% last year. Viral load suppression is at 71%, a 12% increase from 59% last year. Only Botswana, Eswatini, Tanzania, and Zimbabwe have reached the 95-95-95 UNAIDS HIV testing, treatment, and viral suppression targets.



Figure 45: Progress of SADC Member States towards 95-95-95 targets, 2022



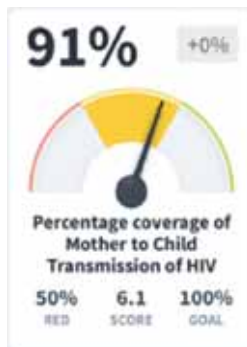
Source: Southern African Development Community (SADC). (n.d.). HIV & AIDS

Increase of HIV/AIDS Expenditure by Member States



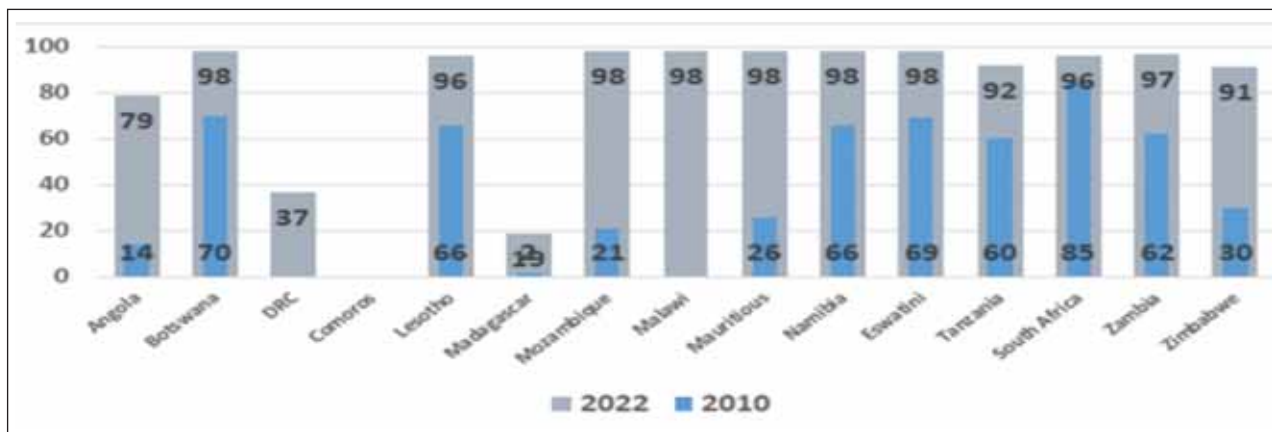
Regional expenditure on HIV increased by \$35.5 million, reaching \$4.54 billion. Despite this, most countries still need support. The HIV Fund continues to aid the regional response, with Round 3 funding underway. It will support 13 critical projects across all SADC Member States to help end AIDS as a public health threat by 2030.

Eliminate Mother-to-Child Transmission of HIV



SADC Member States average 91% in PMTCT coverage. The World Health Organization awarded Namibia a 'Silver Tier' certificate for progress towards eliminating mother-to-child transmission of Hepatitis B and a 'Bronze Tier' for HIV. Recently, Botswana received a 'Silver Tier' for progress towards eliminating mother-to-child transmission of HIV.

Figure 46: Percentage Coverage of Mother to Child Transmission of HIV Programme, 2020 - 2022



Source: Southern African Development Community (SADC). (n.d.). HIV & AIDS

4.6 Strategic Management of the RISDP

Key Messages

Overall Performance: The region registered a score of 6.4 in 2023/24.

The region is facing a massive: resource gap

US\$35.2 million was received from Member States last year and

- US\$185 million was received from ICPs for programmes and projects to be implemented between 2023 and 2027.
- Required resources is an estimated US\$398 billion for implementing programmes and projects

The SADC Secretariat's online presence across all social media platforms increased by 15% against the target of 10%.



Strengthen Institutions, Mechanisms and Processes for Implementing the RISDP 2020-2030

Effective implementation of the regional integration priorities discussed in this report requires strong coordination and management by the Secretariat, sustained interventions by Member States and partners, as well as financial and technical resources. It is equally important to set up and/or strengthen the institutions and mechanisms, as well as implementation approaches.



With an overall score of 6.5, there is good progress in managing RISDP implementation. The number of Member States with SADC National Committees (SNCs) increased from 10 in 2022/23 to 12 in 2023/24. Mandated by the SADC Treaty, SNCs coordinate and oversee national-level implementation of SADC programmes.

Member States should support the full functioning of the SNCs, given their crucial role in the implementation of the RISDP at the country level.

4.6.1 Sign and ratify Protocols, Agreements and Other Legal Instruments



As at 2024, 35 out of 58 protocols had entered into force, while 23 had not, resulting in a score of 5.8, up from 5.6 last year due to one new protocol in Cross-cutting issues.

As was reported in previous year, Pillar III: Social and Human Development leads with a perfect score of 10 (all four protocols in force). Pillar II follows with a score of 5.6 and 5 out of 7 protocols in force. Pillar I scores 4.8, Cross-Cutting Issues have risen to 4.7, and the Foundation pillar scores 3.7, with only 9 out of 20 protocols in force.

The Foundation: Peace, Security, and Good Governance has the lowest score for Protocols in Force. Key observations:

Only Botswana, Eswatini, Lesotho, Mozambique, Namibia, South Africa, and Zambia have ratified the Protocol on the Facilitation of Movement of Persons (2005).

No Member State has ratified the Protocol on the Tribunal of the Southern African Development Community (2014).



Namibia, Malawi, Mauritius, and South Africa still need to sign the Agreement Amending the Protocol on Politics, Defence, and Security Cooperation (2016).

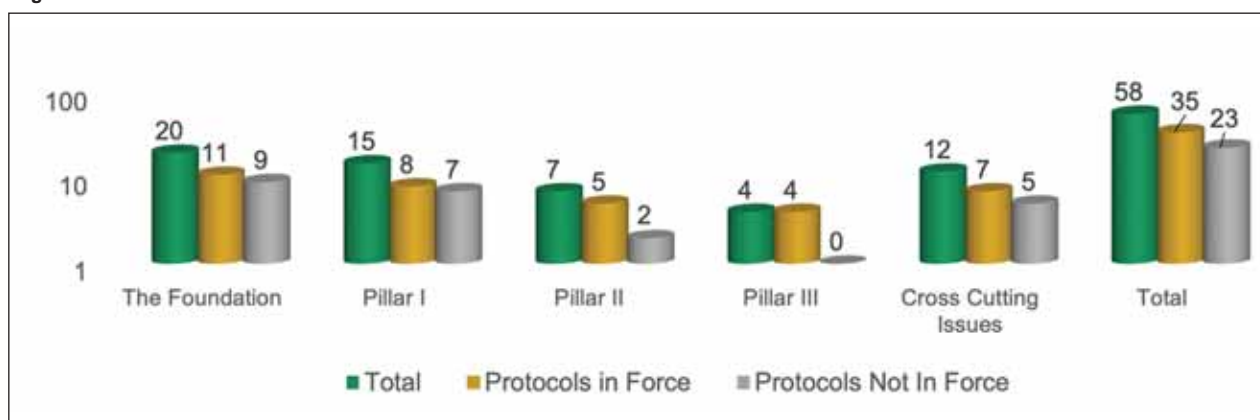
Only Mauritius has ratified the Protocol on the Interstate Transfer of Sentenced Offenders.

DRC, Eswatini, and Zambia still need to sign the Agreement Amending the Protocol on Extradition (2019).

Mauritius, South Africa, and Zambia have not signed the Agreement Amending the Protocol on Mutual Legal Assistance in Criminal Matters (2019).

Figure 47 below shows the total number of Protocols and other Legal Instruments to be signed and ratified, with performance per Pillar.

Figure 47: Status of SADC Protocols



Source: SADC Secretariat Legal Progress Reports, 2024

4.6.2 Mobilise Resources for the SADC Regional Integration Programmes



In 2023/24, US\$185 million was mobilised, an 81% increase from US\$35 million in 2022/23. The EU, USA, Germany, China, AfDB, the World Bank and the Swiss Confederation primarily support the SADC programmes. The 2023/24 target for revenue from ICPs was met, with a moderate score of 5.2 for Member States' contributions. The Secretariat received US\$35.2 million from Member States and US\$185 million from ICPs for programmes and projects to be implemented between 2023 and 2027.

Table 12: International Cooperation Partners Funding and Areas of Support

S/No	ICP	Funding (US\$)	Supported Areas
1.	African Development Bank (AfDB)	5,850,000	Trade and Transit Facilitation
2.	European Union	70,891,250	Trade, market access, natural resources management and institutional capacity building
3.	China	90,000	Institutional capacity building
4.	Germany (KfW and GIZ)	34,345,720	Development initiatives on Regional Economic Integration, Transboundary Protection and Use of Natural Resources, Transboundary Water Management and other capacity building initiatives.
5.	Swiss Agency for Development and Cooperation (MIET Africa)	10,900,000	Development initiatives on Human and Social Development
6.	United States of America (United States Agency for International Development – USAID)	47,700,000	Regional priorities related to economic growth; environment and energy; youth; democracy and governance; and health.
7.	World Bank	15,352,000	Regional Statistics, Climate Resilience, and Capacity Building
Sub-total: FY 2023/24		185,128,970	

Source: SADC Resource Mobilisation Reports, 2024

Resource Mobilisation Forecast

Implementing SADC regional integration programmes requires an estimated US\$398 billion, highlighting a massive resource gap. To address this, the region must aggressively implement the innovative and sustainable financing solutions outlined in the SADC Resource Mobilisation Framework, including operationalizing the SADC Regional Development Fund (RDF).

In parallel to the ongoing work on the operationalisation of the RDF, the Secretariat will continue to engage ICPs to strengthen cooperation and mobilise resources towards supporting the implementation of the regional integration agenda. For the FY 2024/25 (April – July 2024), the Secretariat has already mobilised an additional USD 119.2 million from the EU (USD 105.8 million) and Germany (13.3 million), as part of the continued programming of the 2021-2027 Multiannual Indicative Programme for Sub-Saharan Africa and the operationalisation of the budget commitments agreed in the 2023 SADC-German Bilateral Negotiations on Development Cooperation. Further cooperation agreements will be concluded with the EU (amounting to USD 33.4 million) and Germany (USD 23.9 million), bringing the overall projected resources for the FY 2024/25 to USD 176.5 million. This excludes possible support that is still under programming consultations with other partners such as the World Bank and the African Development Bank.

4.6.3 Make SADC Known to its Citizens and the World

The Region has recorded good progress towards “**Enhancing SADC Visibility and Awareness of SADC, its Activities and Impact**”.



SADC has maintained a strong and active online presence through increased traffic to its online platforms.

The combined followership across all social media platforms increased by 15% against the target of 10%.

4.6.4 Effectively Manage the Secretariat's Budget

The Secretariat maintained a very good performance on the administration of resources per the SADC Financial Regulations.



Effectively Manage Staff Acquisition, Retention and Turnover



The SADC Secretariat's vacancy rate was 21% in 2020 due to a partial recruitment freeze during COVID-19 lockdowns. It improved to 14% in 2022/23 and 11% in 2023/24 with the resumption of regular office duties. Employee retention peaked at 89% in 2023/24. Employee turnover spiked to 7.2% in 2022/23, decreasing to 3.3% in 2023 and 1.6% in 2023/24. The Secretariat and Member States need to mobilise resources to meet the requisite human resource requirements to deliver on the RISDP.



5 CONTINENTAL COOPERATION & INTEGRATION

In July 2023, SADC became the chair of the Tripartite Free Trade Area (TFTA), with 11 Member/Partner States having ratified the Agreement. Recent ratifications by Malawi (December 2023) and Lesotho (May 2024) increased the total to 13, just one short of the required 14 for the Agreement to enter into force. To date, 23 Tripartite Member/Partner States have signed the TFTA Agreement, with ratifications from Egypt, Uganda, Kenya, South Africa, Rwanda, Burundi, Botswana, Namibia, Eswatini, Malawi, Lesotho, Zambia, and Zimbabwe.

The Secretariat is actively encouraging other Member States to ratify the Agreement for it to enter into force and benefit from increased market access, enhanced competitiveness and economic growth in the TFTA. The ongoing efforts to secure the final ratification reflect a strong commitment to these objectives, buttressing the importance of collective action in achieving regional economic integration.

Implementation of the African Continental Free Trade Area (AfCFTA) in the SADC region is on course, with all SADC Member States participating in the grand initiative. Fifteen Member States have ratified the AfCFTA Agreement, demonstrating a strong commitment to boosting intra-African trade, eliminating tariffs, and promoting economic growth. The AfCFTA aims to create a single market for goods and services, facilitating the free movement of businesspersons and investments, enhancing competitiveness, attracting foreign direct investment, and fostering sustainable development. The Secretariat is encouraging Madagascar, the remaining SADC Member State, to ratify the Agreement to ensure full regional participation and maximise AfCFTA benefits for all Member States.

6 SADC INSTITUTIONS

SADC Parliamentary Forum:

The number of Member States that have signed the agreement has increased from eight to nine, including Angola, Eswatini, Lesotho, Malawi, Mozambique, Seychelles, South Africa, Tanzania, and Zimbabwe. Three-quarters of the Member States' signatures are required for the agreement to enter into force and to develop the Protocol in the SADC Parliament.

SADC Administrative Tribunal:

During the Sixth Judicial Dialogue in Algiers, Algeria, in November 2023, SADCAT engaged with other regional courts to enhance judges' knowledge of international administrative law and promote visibility. The dialogue emphasised integrating regional and international courts to promote equitable access to justice and transfer judicial skills. By March 2024, one case was pending before SADCAT.

Regional Peacekeeping Training Centre:

RPTC continued to provide Member States with peacekeeping training aligned with global and regional standards. In 2023/24, RPTC developed the RPTC Strategic Plan 2023-2027 and trained 544 experts in various courses, including Integrated Mission Planning and Disease Management. Training for Regional Peacekeepers and SAMIM Forces is conducted regularly.

Regional Counter Terrorism Centre:

RCTC assisted Member States in developing counterterrorism strategies. Six Member States have developed national counterterrorism strategies: Lesotho, Malawi, Mauritius, Namibia, South Africa, and Tanzania. RCTC also generated bi-weekly terrorism threat assessments and contributed to the SADC Regional Early Warning Centre's Annual Regional Threat Assessment.

SADC Permanent Representation to the African Union:

The Office represented SADC at the African Union, engaged in dialogue with international partners, and provided updates on the continental agenda to inform SADC decision-making.

SADC Plant and Genetic Resources Centre:

SPGRC continued promoting germplasm duplication and conservation, significantly contributing to agricultural resilience and sustainability in the region. However, characterisation needs to be enhanced to maximise the value of genetic resources for regional agricultural development goals by 2030.

7 EMERGING ISSUES IN THE REGION



8 CONCLUSION & RECOMMENDATIONS

This report presented an overview of the SADC region's performance on regional integration in 2023/24 and highlighted the issues that need the Secretariat's and Member States' attention in the last six years of the implementation of the RISDP 2020/2030. The conclusions and recommendations are summarised below.

8.1 Conclusions

The report has revealed that progress towards regional integration in SADC will continue to be negatively affected by low economic growth and poor performance of other macroeconomic indicators, resulting from the long-term effects of COVID-19, climate change, and geopolitical tensions in Ukraine and the Middle East. The region made moderate progress in implementing the RISDP 2020-2030 in 2023/24, although this performance was lower than in previous years.

8.2 Economic Challenges

The region grapples with low economic growth, poor macroeconomic performance, and high public debt levels. Intra-regional trade remains low at 18.3% of total trade, while the manufacturing sector has stagnated with MVA at 11.2% of GDP. Food insecurity has worsened, increasing from 15% to 18% of the population.

8.2.1 Foundation – Peace, Security and Good Governance

The region registered good performance in 2023/24, representing a consistently good score compared to 2022/23. However, Member States must invest more effort towards finding lasting peace in the DRC and Mozambique. It is also essential to address the significant rise in cross-border criminal activities and improve the response time to deploy the SADC Standby Force to armed conflicts, humanitarian emergencies and other elements. Member States should investigate the causes of the low turnout during elections, intensify the investigation and prosecution of corruption cases, support women's representation and participation in peace and security, and address the rise in trafficking in human beings, motorcycle-related offenses and narcotic drugs.

8.2.2 Pillar I – Industrial Development and Market Integration

Slow progress was made under this Pillar. The region will continue implementing measures to improve intra-regional trade, advance the manufacturing sector, and address regional trade imbalances. Progress is significantly required to improve performance on the macroeconomic economic convergence primary indicators, considering the negative impact on the region's growth. Furthermore, strategies and investments are needed to address the worsening food insecurity, support tourism development and implement robust climate change interventions.

8.2.3 Pillar II – Infrastructure Development in Support of Regional Integration

The region is to address the factors affecting the low operating capacity, increasingly diversify the energy mix, increase the uptake and percentage share of renewable energy to the mix, and support the development of regional infrastructure projects in various sectors. It is also essential to increase access to safely managed water supply and sanitation, including storage. The importance of road, rail and port infrastructure and smart corridors cannot be overemphasised to facilitate trade and movement of goods and persons of goods in the region.

8.2.4 Pillar III – Social and Human Capital Development

The region is to put measures in place to prevent the resurgence of cholera, reduce the prevalence of and deaths from HIV, TB, and malaria, and meet the agreed targets. Strategies and resources are also required to address the growing burden of wasting, stunting, overweight and obesity. Unemployment among the youth and child labour also need significant attention.

8.2.5 Cross-Cutting Issues

There has been good progress on the cross-cutting issues. However, Member States' performance on gender parity, especially women's representation and participation in leadership and decision-making, is inconsistent. Member States must also improve the reporting and prosecution of GBV cases and protect wildlife and the wildlife-based economy.

8.2.6 Resource Mobilisation

Despite commendable progress in resource mobilisation, a significant resource gap remains. Member States must aggressively implement the innovative and sustainable financing options outlined in the SADC Resource Mobilisation Framework, including operationalising the SADC Regional Development Fund. Overall, Member States have continued to demonstrate commitment to implementing the RISDP 2020-2030 even in the face of the socioeconomic and geopolitical challenges of the past four years. There is potential to remain on track and deliver the results in the final six years of the RISDP.

8.3 Recommendations

8.3.1 Economic Development

- Implement targeted measures to reduce trade barriers and promote intra-SADC trade, aiming to increase the current 18.3% intra-regional trade.
- Accelerate implementation of the SADC Industrialisation Strategy and Roadmap 2015-2063, focusing on key value chains and promoting technology transfer with the goal of increasing Manufacturing Value Added (MVA) from the current 11.2% towards the 30% target by 2030.
- Strengthen and operationalise the existing regional mechanism for macroeconomic policy coordination, with a focus on addressing fiscal imbalances and debt sustainability.
- Create a more attractive investment climate to reverse the decline in Foreign Direct Investment, which dropped from 6.4% in 2021 to 1.5% in 2022.
- Enhance regional agricultural cooperation to address the worsening food insecurity, which increased from 15% in 2022 to 18% in 2023.

8.3.2 Infrastructure

- Accelerate implementation of regional power projects to address the energy capacity shortfall of 8,441 MW.
- Increase investment in renewable energy sources to raise the share from the current 38% towards the 80% target.
- Continue implementing and enhancing the existing Regional Strategic Action Plan (RSAP) for Integrated Water Resources Development and Management to improve access to safe water and sanitation.
- Enhance cross-border infrastructure connectivity, focusing on transport corridors and ICT networks to support the growing mobile and internet penetration rates.

8.3.3 Social and Human Development

- Strengthen regional health surveillance and response systems, particularly for waterborne diseases like cholera, which has seen a resurgence in the region.
- Scale up successful HIV/AIDS, TB, and malaria prevention and treatment programs to build on the progress made in reducing prevalence and mortality rates.
- Implement a comprehensive regional nutrition strategy, focusing on reducing stunting rates from the current 26.6% and addressing the rising obesity rates in children under five.
- Enhance and implement the existing SADC Youth Employment Promotion Policy Framework and the SADC Youth Empowerment Policy Framework, focusing on skills development and entrepreneurship.
- Harmonize labour laws and strengthen enforcement mechanisms to address child labor, which remains a significant issue across the region.

8.3.4 Peace and Security

- Intensify diplomatic efforts and support for peace processes in conflict-affected areas, particularly in the DRC and Mozambique.
- Enhance regional law enforcement cooperation to address the significant rise in cross-border criminal activities.
- Establish a rapid response mechanism for the SADC Standby Force to improve deployment times for armed conflicts and humanitarian emergencies.

8.3.5 Gender Equality

- Implement quota systems or other affirmative action measures to increase women's political representation.
- Strengthen implementation of the existing SADC Regional Strategy and Framework of Action for Addressing GBV (2018-2030), with emphasis on harmonising laws across Member States and enhancing coordinated support services for GBV survivors.
- Promote women's economic empowerment through targeted programmes in education, finance, and entrepreneurship.

8.3.6 Climate Change and Disasters

- Strengthen implementation and periodic review of the existing SADC Climate Change Strategy and Action Plan (2015-2030), ensuring alignment with the latest climate science and international agreements to address the increasing frequency and severity of climate-related disasters.
- Establish a regional climate fund to support resilience-building projects.
- Enhance early warning systems and disaster preparedness mechanisms to better respond to events like the El Niño-induced droughts experienced in 2023/24.

8.3.7 Resource Mobilisation

- Operationalise the SADC Regional Development Fund as a sustainable financing mechanism to address the significant resource gap for implementing regional programmes.
- Explore innovative financing options, including green bonds and public-private partnerships, to supplement the US\$185 million mobilised in 2023/24.
- Strengthen domestic resource mobilisation efforts, including improved tax collection and management of natural resources.

8.3.8 Implementation

- Streamline the ratification process for regional agreements, addressing the backlog of protocols not yet in force (23 out of 58 as of 2024).
- Strengthen the role of SADC National Committees in coordinating and monitoring implementation of regional commitments at the national level.
- Strengthen the role of SADC National Planning Entities.
- Develop a comprehensive regional data collection and management system to address data limitations across various sectors, ensuring more accurate monitoring and evaluation of regional integration efforts.
- Establish a peer review mechanism to promote best practices and address implementation gaps across Member States, focusing on consistent performance in implementing regional initiatives.

By addressing these challenges comprehensively and implementing the recommended actions, SADC can accelerate its progress towards deeper regional integration and sustainable development. This will require sustained political commitment, enhanced regional cooperation, and innovative approaches to overcome longstanding obstacles and capitalise on emerging opportunities.



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