

BTI 2014 | Angola Country Report

Status Index	1-10	4.44	# 97 of 129	
Political Transformation	1-10	4.55	# 84 of 129	➔
Economic Transformation	1-10	4.32	# 97 of 129	⬇️
Management Index	1-10	3.99	# 96 of 129	
	scale	score	rank	trend

This report is part of the Bertelsmann Stiftung's Transformation Index (BTI) 2014. It covers the period from 31 January 2011 to 31 January 2013. The BTI assesses the transformation toward democracy and a market economy as well as the quality of political management in 129 countries. More on the BTI at <http://www.bti-project.org>.

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Key Indicators

Population	M	20.8	HDI	0.508	GDP p.c.	\$	6105.4
Pop. growth ¹	% p.a.	3.1	HDI rank of 187	148	Gini Index		42.7
Life expectancy	years	51.1	UN Education Index	0.463	Poverty ³	%	67.4
Urban population	%	59.9	Gender inequality ²	-	Aid per capita	\$	7.3

Sources: The World Bank, World Development Indicators 2013 | UNDP, Human Development Report 2013. Footnotes: (1) Average annual growth rate. (2) Gender Inequality Index (GII). (3) Percentage of population living on less than \$2 a day.

Executive Summary

In March 2011, a notice was posted online calling for an anti-government demonstration to demand the resignation of long-time President José Eduardo dos Santos. Such open defiance of the government was unprecedented, even in Angola's post-independence history. While the post was at first dismissed by commentators and opposition parties as a hoax (as it was anonymous, signed with a pseudonym), the regime, however, reacted with concern. Luminaries of the ruling Popular Movement for the Liberation of Angola party (MPLA) and members of government strongly condemned any attempt at "creating confusion" as an illegal act, warning that whoever demonstrated against the government "would get some" – a reminder of the regime's capacity for violence, the threat of which has long hampered open political dissent. The MPLA organized a mass counter-demonstration on March 5, two days before the planned demonstration; as school children, state functionaries and employees of state companies were bused to the march under threat of sanctions, the gathering was hardly a spontaneous show of popular support. On March 7, however, around 20 people gathered at Luanda's Independence Square, and were immediately arrested. Because of the regime's overreaction, the March 7 demonstration was widely discussed and had an impact disproportionate to the number of actual anti-government demonstrators. A number of youth protests, increasing in frequency and size and organized under the banner, "32 is Too Much" – alluding to Dos Santos' 32 years in power – occurred during the review period, in Luanda and in other provincial capitals. The authorities reacted with mounting repression; demonstrators faced administrative and legal obstacles, police brutality, arbitrary arrests and suffered sham trials. Plainclothes "thugs" affiliated with the regime increasingly resorted to violence; the government's control of the media also intensified. But these demonstrations changed the tone of Angolan politics. Opposition parties, hitherto weak in their positioning, started attacking the government more forcefully, condemning the inefficiency of the administration and deploring the dire living conditions for a majority of the population. The creation of a new party, the Broad Convergence for the Salvation of Angola – Electoral Coalition (CASA-CE), only six

months before the elections, attracted dissidents from both the National Union for the Total Independence of Angola party (UNITA) and the MPLA and further stimulated the political debate.

However, in the months before the 2012 general elections, several leading youth activists disappeared and policing intensified. After mounting tension, the election itself was anti-climactic; the contest was quiet, and was marked by widespread voter abstention. Some interpreted this abstention as voter apathy, and an expression of popular distrust in democratic mechanisms as able to break the dominance of the MPLA. Yet many people complained that they were unable to vote, as their names did not show up on voter rolls where they had registered. The MPLA took 71.84% of the popular vote (10% less than in 2008), mainly thanks to the rural vote, where the specter of a return to war helped to influence voters. Government and public media immediately interpreted this victory as a plebiscite in favor of the continued rule of Dos Santos, who was elected for another five-year mandate. Opposition complaints over electoral fraud were dismissed by the National Electoral Commission and the Constitutional Court. Nonetheless, UNITA doubled its share of votes from 2008 to 18.66%, and CASA-CE captured 6% of the vote, giving the new party eight seats in the 220-strong National Assembly. The remaining opposition parties lost seats, with the Social Renewal Party (PRS) winning two seats and the historic National Front for the Liberation of Angola (FNLA) capturing only one seat. When looking at the figures in the capital Luanda, where abstention was highest, the MPLA won only under 50% of the popular vote, a clear indicator of the population's dissatisfaction; and most likely the real reason why the government decided to postpone local elections, originally scheduled for 2014, until 2015.

Despite advances in the diversification of Angola's oil-dependent economy, the gap between the small elite of ultra-rich and the impoverished urban and rural population continued to grow. The economy remained dominated by a clique of politically connected individuals. Thus, despite formal reforms to improve market access for foreign and local investors, corruption remains pervasive and the commitment of the regime to play by market rules remains in doubt. However, in terms of macroeconomic stability, the government has made progress, mainly due to a recovering oil price in the world market and reforms undertaken in cooperation with multilateral financial institutions.

After years of double-digit GDP growth since the end of the civil war, the world economic crisis of 2008 and 2009 and a subsequent drop in world oil prices seriously affected the Angolan economy by depleting foreign exchange reserves. This forced the government to accept, for the first time, an IMF standby-credit of \$1.4 billion in November 2009. This helped foreign exchange reserves recover to \$16 billion by June 2010. Still, by mid-2010 the government was managing a debt crisis, as it had to announce unpaid arrears of \$9 billion to foreign construction firms, prompting the withdrawal of several foreign companies from the country and postponing indefinitely Angola's plans to issue \$4 billion in Eurobonds, despite relatively positive investment ratings from Moody's (B1) and Standard & Poor's (B+) in May 2010. By November that same year, however, the IMF announced that a third of arrears had been repaid and proceeded to distribute subsequent payments of the standby agreement. Thanks to recovering oil prices and an increase in oil production from new ultra-deepwater blocks, the economy in 2011 recovered further. Angola's growth however remains largely driven by oil revenues, which make up 60% of

GNP and 95% of export revenues. The downside to this boom and the influx of money is the growing gap between rich and poor. The oil and construction industries remain largely insular, employing foreign workers and earning revenues that bypass the broader national economy. In the meantime, Luanda has become one of the most expensive cities in the world where still a majority of the population lives in sprawling shanty towns with no regular access to electricity, drinking water or sanitation, and makes ends meet by engaging in the informal economy.

History and Characteristics of Transformation

Shortly after independence from Portugal in 1975, Angola was plunged into a civil war between two former anti-colonial liberation movements: the ruling, formerly Marxist, MPLA and the “rebel” UNITA. Both had their own vision for the country, although their ideas of progress and modernity were not as dissimilar as is often portrayed. However, differences in leadership and constituency – the MPLA’s early leaders came from a cosmopolitan, urban, mixed-race bourgeoisie, while UNITA tapped into the discontent of a marginalized population of the central highlands – were exacerbated in the context of the Cold War, when the MPLA received backing from the Soviet Union and Cuba, while UNITA was supported by the United States and the then apartheid regime of South Africa. By the end of the 1980s, when the Soviet Union pulled out as MPLA patron, both Angolan parties were forced to negotiate a settlement. The MPLA formally adopted the tenets of a multiparty democracy and the 1991 Bicesse Accords laid out a path toward disarmament of the warring parties, followed by multiparty elections.

The country’s first democratic elections held in 1992, however, were overshadowed by a return to civil war, as both parties to the conflict were unwilling to abide by a power-sharing government and had maintained armed troops in the meantime. After a bloody confrontation in Luanda, UNITA managed to capture strategic provincial towns. The MPLA government, now legitimized by elections, managed to co-opt parts of UNITA as “UNITA Renovada” into a Government of National Unity and Reconciliation (GURN). Although civil society, and especially the churches, actively lobbied for a negotiated end to the war, the conflict ended only when UNITA leader Jonas Savimbi was killed by government troops in February 2002. The subsequent Luena Memorandum of Understanding between UNITA and the Angolan Armed Forces therefore amounted to little more than a technical agreement on the cessation of hostilities, with President Dos Santos supervising the process as if he were a neutral arbiter, instead of a party to the conflict.

Since then, the MPLA government has recast itself as the party of stability and peace, and has embarked on an ambitious reconstruction policy, financed by growing oil revenues and oil-backed credit lines. With no significant political opposition, the ruling elite has consolidated its hold on both political and economic power.

After the government repeatedly announced then postponed planned electoral contests, the first legislative elections after the war were finally held in 2008. Due to the MPLA’s access to state

funds, its control of the media and general electoral manipulation – but also based on the population’s desire for peace and stability, and fear that an MPLA loss meant a return to war – the ruling party won a crushing victory, taking 81.72% of the popular vote. Thanks to its absolute majority, the MPLA then pushed a constitutional change through parliament in early 2010, while public attention was conveniently distracted by the country’s hosting of the African Football Cup of Nations. The new constitution was designed to “promote stability” and “reflect Angolan realities.” Indeed, it abolished direct presidential elections, replacing them instead with the automatic nomination to president of the head of the candidate list from the majority party or coalition. This allowed President Dos Santos, in power since 1979, to stand for another two five-year terms. The constitutional change also consolidated the president’s powers, further blurring the lines between the executive and the legislative branches, between political parties and government.

Since the transition from state socialism to a multiparty democracy and a market economy in 1990, Angola has thus certainly made formal progress toward those two goals. Yet in substance, the country has become more autocratic since the end of the civil war.

The BTI combines text analysis and numerical assessments. The score for each question is provided below its respective title. The scale ranges from 1 (worst) to 10 (best).

Transformation Status

I. Political Transformation

1 | Stateness

Question
Score

Since the end of the war, the Angolan Armed Forces (FAA) and various branches of the national police have faced little challenge to the state's monopoly on the use of force, except for the province of Cabinda. In this small enclave, separated from the rest of Angola by the mouth of the Congo River and a small strip of territory of the Democratic Republic of the Congo, the Front for the Liberation of the Enclave of Cabinda (FLEC) continues to wage a low-level guerilla war against what it perceives as the Angolan "occupation" of Cabinda.

Monopoly on the
use of force

8

The FLEC has been active since the 1960s during the times of anti-colonial struggle, but the long Angolan civil war (1975 – 2002) eclipsed the struggle of Cabindans for self-determination. Only after the end of the war in 2002 did the conflict in Cabinda gain more attention.

The FLEC claims that the King of Cabinda had signed a separate treaty with Portugal in 1885, making it a sovereign protectorate of the crown, and that Cabinda was thus never a part of the colony of Angola. More importantly, the FLEC claims that the social and cultural rights of Cabindans are being violated, and that the population is not benefiting from the province's natural resources. Indeed, the oil-rich waters off the coast of Cabinda are responsible for almost 50% of Angola's oil production. Since a partial peace accord was signed in 2006, the government has theoretically agreed to channel a part of the revenues from local oil production back into the province, but the population has experienced only limited benefits. Furthermore, a heavy army presence has led to systematic human rights violations against perceived or real FLEC supporters, including civil society activists, journalists and clergy members.

While the FLEC leadership, in exile in Paris, has renewed its offer to enter a dialogue on "substantial autonomy" with the Angolan government ahead of and after the August 2012 elections, the Angolan government has not at the time of writing replied

to the offer. Angola seems intent on pursuing a military solution to the conflict, combined with infrastructure spending.

The remaining armed FLEC factions, estimated at a few 100 men, have continued sporadic attacks on FAA troops and supply convoys from and into the Democratic Republic of the Congo. While their primary targets are what they call FAA “occupation troops,” they see the oil companies active in Cabinda as complicit in the Angolan “occupation” and therefore as legitimate targets for attacks. In January 2010, when Angola was hosting the African Cup of Nations, the FLEC attacked the Togolese national football team while en route for a match in Cabinda, killing three people and wounding eight. In June 2010, three Chinese workers were killed and one kidnapped in an attack on a supply convoy.

However, due to FAA operations and a lack of external support, the FLEC have been confined to the far north-east of the province. They have little military capacity to stage attacks beyond small hit-and-run ambushes. Furthermore, the Angolan government has the tacit consent of its neighbors that FAA units can cross the border into the Democratic Republic of the Congo (DRC) and the Republic of the Congo in pursuit of FLEC guerrillas who may be seeking sanctuary there. Raids in August and November 2012 led to the killing of several FLEC fighters.

There is a substantial number of private security companies in the diamond-producing provinces of Lunda (Lunda Norte and Lunda Sul), which provide services to mining companies. While these security companies (as well as local state security forces) have been accused of human rights violations against the local population and miners, they do not challenge the state monopoly on the use of force, mainly as most of these companies are owned by army generals. Overall, the state maintains a strong monopoly on the use of force.

Since its early days as a liberation movement, the ruling MPLA party has claimed to build a new, multiracial, multiethnic Angola, following a motto of “only one people, only one nation.”

Nonetheless, ethno-regional cleavages have existed and have been intensified first by discriminative policies during the colonial era and during the independence struggle and subsequent civil war. While ethno-regional issues were partially at the basis of UNITA’s fight in the Angolan civil war, political claims based on ethno-regional identities have all but disappeared since the end of the war, with the one exception of Cabinda in the north. All political parties are very careful not to mobilize support based on such a politically sensitive, potentially divisive subject. The Social Renewal Party (PRS), which based its original support from those of Chokwe identity from the eastern Lunda provinces, has since limited this call to advocate instead for a federative system, with greater political and fiscal autonomy for the provinces.

State identity

8

Furthermore, labor migration since colonial times as well as widespread population displacement during the war has resulted in a mixing of the population, to the extent that the concept of an “Angolan” identity largely supersedes local affiliations. A further indicator for this is the dominance of Portuguese as the lingua franca over national (or vernacular) languages in all but the most remote rural areas.

Due to its socialist past, Angola is a secular state and religious groups have little influence over political decisions. In fact, due to the dominance of political power structures, most Christian denominations have affiliated themselves with the ruling party and have repeatedly come out in outspoken support of the party, as evidenced during the 2008 and 2012 elections.

No interference of religious dogmas

9

There are instances where some churches, especially the fast-growing neo-Pentecostal churches such as the Brazilian Universal Church of the Kingdom of God (IURD in Portuguese), have benefited from preferential government treatment, such as in building permits, for example. However, such examples should be seen as mutually beneficial agreements between a political elite and a dynamic and rapidly growing social group, rather than as a church influencing government policymaking.

Since the end of the war, the government has embarked on an ambitious reconstruction drive to rebuild roads, railroads, schools and hospitals. Overall, however, the capacity to deliver basic services is still weak. Services that provide water, electricity, health care and education are dismal, especially in informal, peri-urban neighborhoods as well as in rural areas. Private taxation remains non-existent; Angola has not had a census since 1971, before independence.

Basic administration

4

More importantly, the government has sought to extend its political control over peripheral regions that it did not control during the civil war, by expanding its administrative structures down to the village level, although it is de facto often the party structure that doubles the state structure. Since the end of the war, traditional authorities have also been included or co-opted into the state’s administrative apparatus, where they serve as intermediaries between the administration and the local population, and to provide jurisdiction at the local level.

2 | Political Participation

While Angola has held two, repeatedly delayed, legislative elections since the end of the war (in 2008 and in 2012), these only were formally considered “free and fair” elections. A new constitution in 2010 abolished direct or indirect presidential elections, and consolidated the power of the president over the political system, further blurring the lines between the executive, legislative and judiciary branches, as well as between the ruling party and the government.

Free and fair elections

4

While opposition parties do exist and can voice their criticism, they have not enjoyed equal airtime or coverage in public media. Campaign money allocated by the state was only distributed one month ahead of the 2012 elections, while the ruling MPLA party, with the privilege of incumbency, had access to much greater state and private funds for its campaign prior to the official start of the electoral contest. Finally, the blurring of the lines between political party and government meant that media coverage and government campaigns could praise “government” achievements in reconstruction projects, while the party could then claim such achievements as a sign of success of its own government program.

Both elections were marred by substantial shortcomings. The composition of the National Electoral Commission (CNE) was dominated by the ruling MPLA party. Several opposition parties were excluded from running over formal “irregularities.” The registration of voters, as well as the updating and auditing of voter lists, was nontransparent and outsourced to a private company that had ties to the government and without a public tender. Equally, electronic vote tallying was handed over to a private company; there was no means for an independent control of the results. In the provinces, voters were either influenced by donations of cash or intimidated by the specter of a return to civil war if the opposition party won. On the voting day, large scores of citizens were unable to vote at their designated polling stations as they had been mysteriously registered elsewhere. Opposition complaints over polling and the election results were dismissed as “unsubstantiated” by the CNE and repealed by the Constitutional Court. Finally, only a few domestic and external observers were accredited, and only at the last minute.

While the gains of the opposition in the new parliament after the 2012 elections do reflect the voters’ will to a limited extent, the parliament has de facto only limited influence to balance the powers of the executive. Ultimately, despite fulfilling the formal requirements of a democracy, the president remains the ultimate arbiter of any political decision. Finally, the long-promised local elections, originally scheduled for 2014, have been delayed until 2015.

While democratically elected political representatives in the National Assembly theoretically have the power to propose, pass and refuse laws elaborated by the executive, the parliament is in practice a largely ineffective talk shop and a rubber-stamp assembly. The house rules give opposition representatives a limited time to voice their opinions, and the ruling MPLA party has, because of its dominance, little incentive to engage in a constructive dialogue with the opposition.

President José Eduardo dos Santos, in power since 1979, was formally elected for the first time in 2012, as under the new constitution, the head of the candidates’ list of the party or coalition with the most seats in parliament automatically becomes president. However, nominal power structures are only a partial indicator of actual political influence: since the 1990s, we have witnessed in Angola the establishment

Effective power to govern

3

of a “parallel government” where close allies of Dos Santos wield a factual power much greater than their formal position would indicate. Thus, the Cabinet of Ministers is largely subordinated to Dos Santos; key influence brokers, such as the heads of the president’s civilian and security cabinets, effectively act as gatekeepers between the cabinet and the president and are free to pursue their substantial business interests without political or legal constraints. The same goes for several high-ranking generals of the FAA, who are accumulating business interests across lucrative economic sectors.

This is even more the case for the president’s family. While Dos Santos’ children do not hold office (one daughter was briefly a legislator but stepped down almost immediately), they control vast fortunes and economic interests. For example, in August 2012, Dos Santos’ son José Filomeno, or “Zénú,” was appointed head of the newly created Sovereign Wealth Fund, a body tasked to make “strategic investments” for Angola’s future with a starting capital of \$5 billion. The fund’s statutes however have yet to be determined.

So while there are no veto groups as such to interfere with policymaking directly, the influence of the presidency and the upper echelons of the MPLA party is strong. No political decision can be taken that would in any way jeopardize the private interests of these groups. By contrast, the democratically elected parliament is almost irrelevant, and opposition parties in parliament have little to no leverage to influence decision-making.

While the new constitution of 2010 enshrined the rights to association and free assembly (without previous authorization), these rights are, in practice, curtailed by severe restrictions. Since early 2011, a number of small, anti-government youth protests, organized mainly in Luanda, has been countered with increasing repression.

Association /
assembly rights
4

Provincial administration has devised legal obstacles to assembly, such as requiring demonstrations to be registered in advance or limiting demonstrations to specific or peripheral places. When these obstacles failed to impede the growing demonstrations, protesters were then jailed and sometimes held incommunicado for several days, under dire conditions, “for their own security” or “for disturbing the public order.” In September 2011, 19 activists were jailed for to up to three months in what was largely regarded as a sham trial. And youth protesters have been subjected to increasing harassment and violence from plainclothes armed “thugs,” a so-called group of citizens concerned with stability and peace but de facto agents of the state security service. These “caenches” (heavies) have invaded protesters’ homes, assaulting protesters with iron bars or homemade irritating sprays, abducted and intimidated protesters, or, in one case, even planted incriminating evidence (one kilogram of cocaine) in the luggage of one activist. In June 2012, a “non-authorized” veterans’ demonstration demanding the payment of overdue pensions was broken up by the

police using dogs, tear gas and live ammunition, which led to the death of at least two protesters.

One month before the August 2012 elections and up until a few months afterward, protests dwindled; yet according to activists, this was due to the disappearance of many anti-government protesters ahead of the elections. Opposition rallies were tolerated ahead of the elections, but immediately afterward the government ordered opposition parties to remove any campaign material from public spaces or face fines.

Outside of the immediate electoral cycle, and especially in the capital, the government has tolerated or even actively encouraged the growth of “organized civil society,” as long as associations are a “constructive partner” to the government and refrain from political activity. Thus, NGOs are welcome to provide those services the state is unwilling to provide, such as in the areas of water, health care, agriculture, rural development and so on. More critical civil society figures are tolerated to project an image of democratic pluralism, or co-opted into party “specialist committees” or administrative positions. Equally, the government has fostered its “own” associations, which develop high-profile social or cultural initiatives to “whitewash” the image of the president and his family.

While freedom of expression is guaranteed by the constitution, serious obstacles impede the free expression of dissenting political opinions. State media, or the only outlets that offer national coverage daily, including the newspaper *Jornal de Angola*, television stations TPA 1 and TPA 2 and the national radio station RNA, are characterized by government-friendly editorial guidelines and pervasive self-censorship. Government achievements gain extensive, positive coverage, as well as statements, policy programs and other activities of the ruling MPLA party. Conversely, opposition parties attract only limited, predominantly critical, coverage.

Private media outlets – mainly commercial radios and weekly magazines – are also restricted in their freedom of expression. Most outlets have been purchased by media conglomerates associated with the ruling elite, after funding from advertising dried out. Even if such media outlets function as independent and often sensationalist in reporting style, they now follow a similar pattern of self-censorship as do public media. A certain amount of criticism is allowed by the government, as it offers an example of media pluralism to the international community and to the local upper middle classes, while in fact reaching only a very limited audience in the capital Luanda. When interviews or articles are too critical of the government, owners enforce the printing of a blank white page instead.

The few media outlets that are still independently owned are subject to multiple forms of harassment when reporting news critical of the government. *Rádio Ecclésia*, the Catholic broadcaster, has repeatedly been denied a nationwide license and is limited to broadcasting in Luanda, as is *Rádio Despertar*, the successor to the UNITA party’s

Freedom of
expression
5

war-time sender, Vorgan. Magazines such as *Angolense* and *Folha 8* have experienced the confiscation and burning of entire editions, as well as have been subject to libel suits or other forms of judicial prosecution when they overstep the “fine line” of criticism tolerated by the ruling elite.

3 | Rule of Law

Although legally government powers are formally separated, there is in practice a predominance of the executive over the legislative and the judiciary, which was further consolidated in the 2010 reform of the constitution. More than just the executive, it is in fact the president and his close advisors that can overrule parliamentary and ministerial decisions by presidential decree.

Separation of
powers
3

Judges and members of government commissions are appointed by the president according to political loyalty, and are routinely subject to political interference; in large parts of the country, especially in the provinces, the courts are largely irrelevant. The National Assembly is dominated by the ruling MPLA party, and rubberstamps the executive’s decisions. In the few cases where the MPLA opposed a bill, as happened with a draft bill on Internet security in March 2011, the party leadership opened a disciplinary process against its dissident legislators.

Although there is a Supreme Court, a Constitutional Court, a state attorney general and an ombudsman, these positions are appointed according to political loyalty and are subject to political influence. Investigations are routinely opened or closed according to “superior orientations,” that is, directives from the presidency, while complaints filed by the opposition or civil society activists are dismissed or simply not pursued. This was the case for challenges to electoral results by the UNITA party, the CASA-CE party and the PRS party in September 2012, as well as for a corruption charge against three high-ranking officials, filed by investigative journalist Rafael Marques in January 2012. By contrast, the courts are quick to prosecute opposition figures for libel, defamation, unpaid fines or even abuse of professional titles. At lower levels, the judiciary functions more independently (in civil and criminal courts), but corruption is rife, and condemnations of persons linked to the elite only happen in cases of a political settling of accounts, when the person in question somehow fell out of favor.

Independent
judiciary
3

Despite the adoption of an anti-corruption framework, Angolan politicians and members of the elite pursue business interests unhindered by any legal obstacles. Independent and foreign media sometimes publicize cases of influence peddling, embezzlement and corruption, but charges are only brought about when it suits a political interest to get rid of potential rivals within the system. This was the case for General Miala, imprisoned in 2006 for unspecified acts of corruption, as well as in the “BNA-Quim Ribeiro case,” opened in 2010 against the former police commander

Prosecution of
office abuse
3

of Luanda. Ribeiro was accused of withholding \$3.7 million that was seized as evidence, part of a larger sum that was embezzled from the National Bank of Angola (BNA), and of ordering the assassination of an accomplice.

Civil rights are guaranteed by the constitution, but they are violated in certain contexts. These violations increased in the run-up to the 2012 elections, when anti-government activists were arbitrarily detained, beaten, subject to interrogation and sentenced to jail. In Luanda, female street vendors are routinely chased by the police, beaten with sticks and sexually harassed, and their merchandise is confiscated or destroyed; the police also sometimes kill suspected “bandits” and are only rarely held accountable for such extralegal killings.

Civil rights
5

In the provinces, the situation is generally worse, as the population has less means of redress through the courts or through public scrutiny. This is especially the case in Cabinda, where civil society activists and suspected FLEC-supporters are often prosecuted, detained and tortured. The same holds true in the diamond-producing areas of Lunda Norte and Lunda Sul, where the local population is subjected to human rights abuses by the army, the police and private security forces, including torture and extralegal killings.

However, there has been a growing awareness of civil rights since the 2010 constitutional revision, at least in Luanda and in some provincial capitals, where citizens and politicians have started to speak the language of civil rights and appeal to their new constitutional rights to block, for example, housing demolitions, or to demand the right to demonstrate. Despite this tentative positive dynamic, legal safeguards are still largely failing to protect the rights of citizens.

4 | Stability of Democratic Institutions

While formally having stable democratic institutions, Angola is in fact an authoritarian state that masterfully masquerades as a functioning democracy, allowing a minimum of political participation so long as the ruling party’s dominance is not threatened. Thus the functioning of democratic institutions is curtailed by political and structural factors. Due to the strong centralization of power, regional and local authorities have little autonomy vis-à-vis the central government. Provincial governors are nominated and demoted by the president and depend exclusively on his powers, having little budget autonomy; in the provinces, however, governors can rule as they please, with little accountability to the local population. There are no regional or local assemblies. At the municipal level, the autonomy of authorities is further curtailed, as administrators’ decisions can be, and are often, overturned by superior orders. This is especially the case when someone in the community has a direct, personal link to someone higher up in the chain of power. And while at the communal

Performance of
democratic
institutions
3

level “consultation and auscultation councils” (CACs) have been installed to sound out the needs of the population, experience so far has been mixed.

At the national level, the parliament and the courts are subject to political interference. There has been a professionalization of the public administration, as evidenced, for example, in the faster treatment of visa requests or the introduction of electronic payments. However, the functioning of services is often hampered by inefficiency, an adherence to cumbersome bureaucratic procedures (the necessity of white seals, black ink and triple copies), interdepartmental rivalry and a lack of communication. The 2010 debt crisis, for example, was in part a result of severe accounting discrepancies between different departments. Finally, administration positions have for a long time been distributed according to political affiliation and personal favor, and thus functionaries are often not those with the best training but those with the best connections.

The acceptance of democratic institutions is generally high, although the commitment to their effective functioning varies. The government is formally committed to democracy and promotes democratic institutions, such as regular elections and the separation of powers. However, a tightly knit circle around the president exerts undue influence over all political and economic processes and subscribes to democratic institutions so long as they do not threaten its dominance. The military leadership is also involved in the system and does not interfere in political processes as long as their extensive business interests are not threatened; the military does not, therefore, as in many other countries, serve as a counterbalance to the excesses of the political class. Opposition parties, while contesting the MPLA’s dominance, also accept the democratic framework and despite rhetoric over “mobilizing mass protests” ahead of elections, in general subscribe to democratic institutions and procedures.

Due to the widespread and active adherence to Christianity, churches of all denominations would theoretically wield substantial veto power, but because of this, potential church leaders have been courted by the regime since the end of the war and most have thrown in their lot with the MPLA. As a relic of the socialist era when only one, centrally organized union was allowed, there is also little independent union activity in Angola. Only in the key oil industry, localized union action has sometimes been successful in protecting particular interests, but generally striking workers in state enterprises have faced dismissal or arrest. A few civil society associations have been successful in advocating for particular causes, but these have been mainly local issues, such as housing demolitions or land rights, and with a few exceptions, such groups have had little success lobbying parliament for legislative changes.

Commitment to
democratic
institutions
3

5 | Political and Social Integration

Angola is effectively a dominant-party regime, where the ruling MPLA holds an absolute majority in parliament and dominates all other parties. It has interpreted its electoral victory in 2012 as a plebiscite on President Dos Santos' rule, and therefore the party has little interest in seeking dialogue or building compromise with political opposition parties or extra-parliamentary interest groups.

The MPLA itself is characterized by strong party discipline, where only a few people, due to their personal standing, family connections or past participation in the liberation struggle, can openly challenge the president. The MPLA presents itself as a mass-based party, and has made it very easy for people to adhere; it claims to have four million card-carrying members. However, many new members join only as a means of social mobility and personal advancement, and there appears to be little bottom-up agenda setting, as most policy decisions are taken by "superior orientation," that is, come from the president down. The president also dominates the party's central committee and political bureau, its highest decision-making organs. Despite internal tension between the president's circle and dissenting tendencies, such as the old guard of the guerrilla struggle, the MPLA displays coherence, stability and unity to outside observers. For the 2012 elections, President Dos Santos also managed to impose a vice-president candidate of his choice, the former Sonangol CEO, Manuel Vicente, against the will of parts of the party. The party dominates the administration and branches of the executive down to the local level, where duplication is often the case; for example, when a communal administrator is also the local party secretary.

Of the opposition parties, UNITA is still struggling to overcome its past as one of the warring parties to the Angolan conflict, and has never made a clear break with the legacy of its former leader, Jonas Savimbi. It has only as of the review period managed to formulate a more credible political alternative, and thus become a political party with a broader appeal, winning 18% of the national vote. Interestingly, both in the 2008 and the 2012 electoral contests, UNITA gained the most votes in Luanda, while its traditional stronghold, the central highlands around Huambo and Bié, went to the MPLA. This is most likely because UNITA has the largest mobilization capacity and best organizational structure of all opposition parties, down to a provincial level, and is therefore perceived as the party that could most successfully challenge the dominance of the MPLA. However, the party is also hampered by a lack of internal democracy; party President Isaias Samakuva was re-elected for a third term at the 2011 congress, much to the dismay of younger members; internal dissidents then faced disciplinary action.

As a result, former UNITA member Abel Chivukuvuku founded a new party, CASA-CE, in early 2012. This party successfully positioned itself as a "third alternative" to

Party system
6

the existing MPLA-UNITA polarization, and attracted prominent dissidents from UNITA and MPLA as high-profile candidates. Despite its relative newness and suspected electoral manipulation by the MPLA, the party gained eight seats in parliament, all from the Luanda circle, where it took close to 13% of the popular vote.

The PRS, a party originally based in the Lunda region, managed to gain two seats, both in Luanda, while the FNLA, the third representative party of Angola's historic former liberation movements, only gained one seat, as the party has been marred in past years by internal leadership struggles, and failed to reconnect with its traditional social base in the north.

Several smaller opposition parties were excluded from running in the 2012 elections, such as Bloco Democrático and Partido Popular. Both, however, have only a small hold among educated urbanites. Other small parties were "extinguished" by the Constitutional Court after the elections, having failed to gain a seat in the assembly.

The political system is still largely dominated by the particular interests of a restricted circle close to the president. Somewhat similar to a socialist system, professional associations and trade unions are largely still affiliated with the ruling party in Angola. In November 2012, for example, the Angolan Bar Association (Órdem dos Advogados) opened an enquiry into the validity of the diploma of one of its members, William Tonet, an outspoken critic of the regime and independent newspaper publisher.

Community-based organizations have been partially successful in advocating for local interests and mediating between the population and the local administration. However, local associations are often created at the instigation of and with the help of local administrations, to serve as an "organized" interlocutor for the administration. This is the case for example with veterans' organizations at the neighborhood level, which are supposed to ensure there are no conflicts over the payment of veterans' pensions.

Since early 2011, several loose groups, often mobilized via social media, have acted as aggregation points for the dissatisfaction of urban and educated yet unemployed youth, and have staged anti-government protests. Equally, war veterans' associations in Luanda and provincial capitals, as well as associations of street vendors or moto-taxi drivers, have held protests that were swiftly and decisively repressed by security forces.

Public opinion surveys, especially over political issues, are unavailable in Angola. However, it can be surmised from popular opinion (NGO reports, interviews and debates in social media) that the population is largely committed to democracy and the electoral process, and rejects alternative systems, or the idea of extra-parliamentary opposition or uprisings, preferring stability and continuity following a

Interest groups
4

Approval of
democracy
n/a

long period of civil war – a sentiment that the ruling party has successfully nurtured and exploited, to discourage Angolans from supporting opposition parties.

However, election results are largely perceived as flawed and not accurately reflecting the popular will. This also explains the large number of voters who abstained from the 2012 elections (63% turnout, as compared to 87% in 2008). This was especially the case in the capital Luanda, where abstention levels reached over 50%. Hence the legitimacy of the government – executive and parliament – is increasingly questioned by parts of the population, mainly the young, increasingly educated, budding urban middle class. Equally people have little trust in the judiciary or the security forces to safeguard their interests.

Public opinion surveys are difficult to obtain. Although Angolans generally complain about a decline in values and mutual solidarity, levels of trust and mutual help among neighbors, family and church members are still fairly high, even in the capital Luanda. This environment of trust and solidarity works, even if it rarely transcends the family or other narrowly defined community boundaries. It does not however automatically translate into self-organized, autonomous associations. Some church parishes successfully act as a group offering social cohesion and mutual support, as well as do some community-based, smaller neighborhood associations, often run on a voluntary basis by locals.

However, as soon as associations become entangled with organized NGOs, they are subject both to government attention, including a host of regulations and legal prerequisites, and financial constraints, and therefore donor demands. Nonetheless, many groups manage to provide services to the population across the country, as long as they abstain from addressing more explicitly “political” subjects such as transparency or accountability, electoral observations or human rights. “Permitted” areas of work include the improvement of basic infrastructure, water and sanitation, community health, microcredit financing and food security, but such efforts do not constitute in any way a counterbalance to the party-state’s domination.

Social capital

5

II. Economic Transformation

6 | Level of Socioeconomic Development

Although statistics are notoriously hard to come by, Angola is observably a very unequal country, where luxury villas rub shoulders with informal shantytowns, and the gap between urban and rural areas is widening. Driven by high world oil prices, the country has experienced an unprecedented economic boom since the end of the war, with GDP growth rates averaging 11.5% since 2002. Equally, GDP per capita

Question
ScoreSocioeconomic
barriers

2

(PPP) is on paper \$5,930.42, well above the Sub-Saharan African average. Despite stupendous economic growth Angola was ranked 148th of 187 surveyed countries in the 2011 UNDP Human Development Index. This is largely due to structural exclusion of large parts of the population from the benefits of this boom. With a Gini coefficient of 58.6 in 2009, and two-thirds of the population living under \$2 a day, the country's economic success has benefited only a small, politically connected elite. While the countryside survives largely on subsistence farming, the population in the cities often depends on informal commerce to make ends meet. This is especially the case in the capital Luanda, where an estimated one-third of the population live, and which is alone responsible for 75% of GDP production. Large parts of the population are excluded from the labor market, and women bear the brunt of providing for their families through informal commerce.

There is no economic discrimination due to religion or ethnicity, although personal ties and corruption do play a role in gaining access to employment. Moreover, due to its socialist legacy, the country invested in the education of women, and in the public service (including politics, army and police), women are fairly well-represented. However, due to the war and the neglect of investment in education, literacy levels still only reach 69.6% (2010) – in some remote provinces such as Moxico, illiteracy is even said to be as high as 80%. Especially in tertiary education, the lack of study places at public institutions is direly felt. This has led to the cropping up of a host of private universities in Luanda and some provincial capitals, which charge substantial fees and whose academic standards are yet untested. Nonetheless, we can see in the cities the beginnings of a small, fragile yet emerging middle class. Its members are often from a younger generation who have found employment in public service, the oil industry or the burgeoning banking sector, for example, and who manage to save and study to invest in their future.

Economic indicators		2009	2010	2011	2012
GDP	\$ M	75492.4	82470.9	104115.9	114197.1
GDP growth	%	2.4	3.4	3.9	6.8
Inflation (CPI)	%	13.7	14.5	13.5	10.3
Unemployment	%	-	-	-	-
Foreign direct investment	% of GDP	2.9	-3.9	-2.9	-
Export growth	%	-2.6	-19.5	-6.3	-
Import growth	%	7.2	-3.8	12.6	-
Current account balance	\$ M	-7571.6	7506.0	13084.6	13851.2

Economic indicators		2009	2010	2011	2012
Public debt	% of GDP	36.5	37.6	31.5	29.3
External debt	\$ M	17014.3	19004.0	21115.2	-
Total debt service	\$ M	3554.6	2323.4	2873.5	-
Cash surplus or deficit	% of GDP	-	-	-	-
Tax revenue	% of GDP	-	-	-	-
Government consumption	% of GDP	17.5	17.6	19.5	-
Public expnd. on edu.	% of GDP	-	3.5	-	-
Public expnd. on health	% of GDP	4.5	2.1	2.2	-
R&D expenditure	% of GDP	-	-	-	-
Military expenditure	% of GDP	4.4	4.2	3.5	3.6

Sources: The World Bank, World Development Indicators 2013 | International Monetary Fund (IMF), World Economic Outlook 2013 | Stockholm International Peace Research Institute (SIPRI), Military Expenditure Database 2013.

7 | Organization of the Market and Competition

Despite the government's intentions to attract foreign investment and diversify the national economy, it is still difficult and costly to open and operate a business in Angola. Foreign and local investors are theoretically treated equally, and investors can apply for tax breaks and import duty waivers with the National Agency for Private Investment (ANIP) for investments above \$1 million. Also, the creation of the Guichê Único de Empresas (GUE) has simplified the registration process for new companies, which can now apply for all necessary documents and permits in one, single place. Nonetheless, the World Bank ranked Angola at 172 of 185 countries for 2013, mainly due to the costs and time required to complete all required procedures, as well as over the weak legal protections for investors. For example, it takes 1,011 days to enforce a contract through the legal system, compared to the Sub-Saharan average of 643 days. Beyond formal hurdles, any lucrative business venture will attract the interest of powerful figures connected to the regime. Investors will therefore experience pressure to form some kind of partnership. This then smoothes and accelerates all processes, and opens up the Angolan market to the foreign partner.

The government has also taken measures to counteract the "dollarization" of the economy, passing a bill that requires oil companies operating in Angola to pay their subcontractors, wages and taxes in the national currency, the kwanza, and through Angolan banks. As the currency, which is loosely pegged to the U.S. dollar to combat inflation, is still very vulnerable to oil price shocks, this raises substantial risks of

Market-based
competition
4

capital controls and currency inconvertibility. However, due to the high levels of production and a stable oil price, foreign exchange reserves reached \$30 billion, covering eight months of imports, in November 2012.

However, macroeconomic stability and increasing competition have not translated into sufficient job creation. With 26% the official unemployment figure, a majority of the population is active in informal commerce or subsistence agriculture. Although no reliable data is available, the informal sector is large and some sectors such as retail trade are dominated by informal traders. The government aims to include informal activities into the formal economy.

Except for the telecommunications sector, where a regulatory law was passed in 2001, there are no anti-trust laws in Angola. The drafting of an anti-competition bill that started in 2004 has been put on hold indefinitely. There is therefore a strong tendency of monopolies or oligopolies, especially in the strategic oil and mining sectors, but, ironically perhaps, also in telecoms. In the oil sector, all producing and exploring companies are required to form a joint venture with the state oil company Sonangol, which by law holds 51% of shares. Sonangol has greatly diversified its activities through subsidiary companies and now has interests not only in distribution and logistics but also in mining, agro-industry, housing and air transport, and is investing in oil joint ventures across the globe. In the diamond mining sector, the state company Endiama is participating in all its exploration activities in a similar way.

More importantly, well-connected individuals such as the president's children, ministers or high-ranking generals, have free rein to pursue business interests across sectors, leading to the concentration of economic power in very few hands. In January 2013, an Angolan economist voiced the popular opinion that 80% to 90% of Angola's GDP was concentrated in the hands of 20 individuals and their families. Isabel dos Santos, the president's daughter, for example, holds substantial shares in Unitel, one of the country's two mobile network providers, as well as in banking (Banco BIC), property development (ESCOM), media, retail and mining. In the construction sector, Brazilian company Odebrecht enjoys a "near-monopoly" due to its establishment in the country since 1984 and its privileged access to the president, and has expanded into mining and agri-business.

Although Angola has joined the Southern African Development Community (SADC) free-trade agreement on paper, it has been slow in implementing the accord, citing concerns about its "weak economy," to protect Angolan enterprises from South African competition. Despite an attempt to reform customs duties in line with WTO guidelines in 2007, and with one of Africa's lowest import tariffs (7.3%), imports remain costly and the process is complicated, as numerous fees and protracted procedures are compounded. Capacity limits at the port of Luanda mean that goods are usually detained at the port for several weeks before being cleared, leading to the charging of substantial additional fees to the importer for the delay. By contrast,

Anti-monopoly
policy

2

Liberalization of
foreign trade

5

Chinese construction companies are often exempt from paying import duties, as they are subject to special agreements attached to oil-backed credits. Local companies, if politically connected, can also circumvent import duties. For example, a company belonging to several Angolan Armed Forces (FAA) generals imports spirits and cigarettes without paying import taxes on the merchandise.

The Angolan banking sector is very dynamic and has experienced strong growth and expansion throughout the country in recent years. It is, however, vulnerable due to inadequate regulations and government intervention. As owners/shareholders are usually from elite families, policing and regulation is impossible, even if oversight mechanisms existed. For example, in the wake of the euro zone crisis in 2011, some Portuguese banks were bailed out by the Portuguese government, resulting in stricter oversight. The Angolan authorities, however, announced that they would consider the nationalization of the Angolan subsidiaries of these banks if the bailout resulted in “state interference” in the banks’ operations.

The implementation of a new law that requires oil companies to pay for services and goods in the local currency, the kwanza, through local banks is likely to treble the transaction volumes of the banking system, but may also stretch it to capacity, due to a lack of trained staff. The hasty implementation of the new law, starting from 1 October 2012 as opposed to the originally announced date of October 2013, is probably a measure to buffer foreign exchange reserves against depletion in the case of dropping world oil prices.

Indeed, the country faced a severe drop in foreign exchange reserves in 2009 after world oil prices fell, followed by a debt crisis in mid-2010, when the Finance Ministry revealed a \$9 billion debt owed to foreign construction companies. With the help of an IMF standby-credit in November 2009 and to recovering oil prices, the crisis was overcome and in November 2010 the IMF announced that two-thirds of the arrears had been repaid; in the meantime, foreign exchange reserves also recovered. However, the debt crisis is indicative of mismanagement and a lack of systemic budget transparency that has only partially been addressed; in December 2011, the IMF highlighted a \$32 billion gap in government accounts between 2007 and 2010, equivalent to a quarter of GDP.

8 | Currency and Price Stability

The National Bank of Angola (BNA) is not independent but subordinated to the Ministry of Economy. It has nonetheless been successful in maintaining the stability of the kwanza and in combating inflation. It had to abandon the unofficial peg of the kwanza to the U.S. dollar in October 2009, when falling oil prices increased pressure on the currency, but after depreciating the currency by around 20%, the kwanza has been relatively stable since. Equally, the inflation rate dropped to under 10% at the

Banking system

4

Anti-inflation /
forex policy

7

end of 2012, from 11.38% at the end of 2011. Thus the spread between the official exchange rate and the black market rate has been small (under 5%), as opposed to the days of rampant inflation in the early 2000s.

However, the kwanza remains highly vulnerable to oil-price shocks; a drop in world oil prices would quickly deplete foreign exchange reserves and put the kwanza under pressure. A new law on transactions in the oil sector, requiring companies to request the acquisition of dollars from the BNA and to supply quarterly reports, gives the BNA leeway to set the date and exchange rates for dollar sales, which is likely to mitigate depreciation.

The mid- to long-term stability policies of the government appear to have had a positive effect on the reduction of public and external debt. Public debt, which stood at 31.4% of GDP in 2010, has fallen to 24.7% in 2012, and is expected to decline further to 13.7% of GDP in 2015. Equally, the government has successfully managed the fiscal deficit, from a 4.9% deficit in 2009 to a 4.7% surplus in 2012, mainly thanks to higher oil prices, reduced imports and a tight fiscal policy. However, the creation of a Sovereign Wealth Fund in October 2012, touted as a measure to stabilize and diversify the Angolan economy, has been overshadowed by undefined legal guidelines and purposes as well as suspicions of corruption and embezzlement, due to the appointment of one of the president's sons to the fund's board of directors. Equally, the government refused an additional IMF loan in mid-2011, claiming that it "did not need the money," and thus giving the impression that it wanted to avoid stricter oversight of budget and spending.

Macrostability
7

9 | Private Property

Property rights are protected by legal safeguards. Angola ratified a Voluntary Arbitration Law in 2003, which theoretically allows for international arbitration. Political influence over the judiciary, however, poses risks of arbitrary intervention or adverse discrimination in transactions. This is especially the case when the business interests of powerful individuals are threatened.

Property rights
4

All land belongs to the state, and individuals and corporations can only acquire surface use in the form of long-term leases. This gives the state leeway to cancel leases if the land appears to be unexploited, and thanks to political interference and corruption, individual interests often supersede the letter of the law. Powerful individuals, such as provincial governors, ministers and generals have over the past years acquired significant areas for commercial farming in the interior of the country, despite legal provisions that would protect the customary rights of people living, cultivating and herding in the area. Furthermore, private property has been expropriated for urban renewal programs, without adequate compensation, mainly in Luanda, Benguela and Lubango, displacing the local population – sometimes to new

“social housing” areas, but more often leaving them stranded in improvised tent cities for several years.

Also, the government has threatened nationalization or license revocation in some cases. In early 2012, the government said it would nationalize the Angolan subsidiaries of Portuguese banks that required a state bailout after the financial crisis, if the state bailout in Europe resulted in stricter foreign oversight of their operations in Angola. Around the same time, the U.S. oil company Cobalt came under scrutiny in the United States for violating anti-corruption laws, as its Angolan minority partner, Nazaki Oil, is owned by three influential regime figures. One of the owners, the then CEO of Sonangol, Manuel Vicente, said Nazaki had not violated Angolan law, and if the partnership posed problems to Cobalt, it would have to divest itself of the concession.

Private companies and foreign investment is encouraged, and the creation of a “one-stop shop” by the administration (Guichê Único de Empresas, GUE) to simplify the registration and legalization of a private company has improved matters. However, strategic sectors such as oil and gas, diamond mining, and – for future developments – further “strategic” mineral interests are required by law to form joint ventures with state companies, which hold the majority of shares in the joint venture. Equally, processes of privatization and/or license attribution have often not been transparent and have been subject to political influence. For example, the mobile telecommunication sector is divided between two companies, one of which is owned by Isabel dos Santos, a daughter of the president, and the other by Manuel Vicente, General Kopelipa and General Dino, three high-ranking government officials. The same can be said for most state tenders, which are often attributed in a nontransparent way but instead according to political affiliation, as favors and/or kickbacks (public waste management, pavements and roads, the acquisition of vehicles for state functionaries and so on).

Private enterprise
4

10 | Welfare Regime

Social safety nets are rudimentary. State functionaries are partially covered by retirement plans, while some companies, such as Sonangol, offer private social security schemes to employees. A large majority of people, however, have no pension plan or are not covered in case of illness or unemployment. There are no public provisions for health care; people have to pay for treatment themselves at a high cost. Patients in hospitals often depend on their family to bring them food and to buy medicine. Equally, while some state pensions exist (for war veterans, for example), the amounts disbursed often arrive late and are woefully inadequate to cover the high costs of living. A plan to roll out a “bolsa família” (monthly subsidy for families) on the Brazilian model was mooted ahead of the elections, but discussions have stalled since over possible ways of implementing the program. The record of the past decade

Social safety nets
2

is that of a government that speaks the language of poverty alleviation but de facto gives it little to no priority.

In November 2012, Vice-President Vicente admitted at a regional World Health Organization (WHO) summit that two doctors per 10,000 citizens are “manifestly insufficient.” Nonetheless, social spending remains low in the regional comparison: public expenditure on health was reduced by over 5% from 2010 to 2011 to only 2% of the budget – one of the lowest worldwide – while military and public security spending rose to 7% of the budget. Thus, although life expectancy at birth improved slightly, to 51.7 years in 2011, health and social indicators remain worrying. Despite Angola’s economic progress, infant mortality rates are the highest in the world, with 179.5 deaths per 1,000 children under the age of one in 2011 (worse than Afghanistan or Niger). The UNDP reported 260 deaths per 1,000 children under the age of five, and the WHO stated that 27.5% of children in the same age group were underweight. Only 50% of the population has access to clean drinking water, with the figure dropping to 23% in rural areas. Despite reported drops in poverty, improvements are mainly limited to Luanda, and two-thirds of the population continues to live on under \$2 a day. Although statistics don’t always mirror a situation adequately, it is obvious that large parts of the population are at risk of poverty.

Based on its socialist past, Angola has made good progress toward gender equality, offering women access to education, state employment and political office, including positions in the police and the armed forces, as well as in the executive branch and in parliament. School enrollment rates are relatively high and evenly distributed, especially in the cities. Women in secondary and tertiary education also tend to achieve higher grades than men, despite a more marked imbalance at the tertiary level, where the ratio of women to men is 65.5:100. However, at national level, literacy rates remain unequal, with 82.8% for men as opposed to 57% for women. This is largely because women also remain the main income earners for their families in the informal sector, where they make up 70% of the workforce.

With regard to ethnic or religious affiliation, there is no discrimination per se, but the budget allocates unequal shares to different provinces. For example, Cabinda receives sustained investment in infrastructure, education and employment for political reasons, while the neighboring province of Zaire, which together with Cabinda is responsible for most of Angola’s oil production, complains of neglect. Equally, the remote eastern provinces of Moxico and Kuando-Kubango are neglected in terms of access to education and employment. With regards to political affiliation, the picture is slightly more complex. While former UNITA cadres have been integrated into the army (the current chief of staff, General Nunda, was a UNITA commander), and even into the executive (Foreign Minister George Chicoty, as one example), the lower ranks of the administration, and especially positions in state-owned firms, are open only to people affiliated with the ruling party.

Equal opportunity
4

11 | Economic Performance

In strictly economic terms, the Angolan economy has been performing well, experiencing spectacular, two-digit growth rates since the end of the war in 2002 up until 2009 and 2010, when world oil prices dropped as a consequence of the world economic crisis, and growth rates turned negative. Since then, GDP growth has recovered to 8.2% in 2012 and 7.1% in 2013 (estimated), mainly due to an increase in oil production and recovering crude oil prices. Indeed, this growth is still overwhelmingly dependent on oil exports, which make up 90% of export revenue and 75% of tax revenue. Overall, tax revenues made up only 10.6% of public finances in 2012. The government is thus concerned with diversifying the economy and its tax base away from oil.

While official figures state unemployment at 26%, a majority of jobs are in the informal sector with little social security. The unemployment rate rises to 58.3% in rural areas, a clear indicator of the country's regional imbalances.

Output strength
7

12 | Sustainability

With little popular awareness on environmental protection and only sporadic government action on environmental issues, it is not a surprise that Angola is ranked at 160 of 163 surveyed countries on the Environmental Performance Index. There is no recycling services or waste separation services, nor incentives to reduce the private consumption of fuel, cooking gas, electricity or water (although one could argue that for the latter two, constant provider failures serve as a “natural” regulator). And while Angola is signatory to several international treaties, such as the 2007 Kyoto Protocol, environmental regulation in the oil and mining sectors is regularly disregarded to the benefit of economic growth. Oil companies that have caused oil spills off the shores of the Cabinda and Zaire provinces have been nominally held accountable for cleaning costs, but local fishing communities have not seen any benefits from the allegedly paid compensations. Equally, land reserves (reservas fundiárias) that could serve as nature reserves or wildlife sanctuaries are often rezoned for lucrative property development.

Environmental
policy
3

While the country has made significant progress in primary and secondary education since the end of the war, with enrollment rates at 76.3% nationwide, tertiary education remains a problem. Only 2.6% of the 2011 state budget was allocated for education. Although the government has opened up new public university campuses in six provinces outside Luanda, there is a lack of qualified teaching staff, and standards remain low. Tertiary enrollment rates are at 2.8%, as only few spaces for students are available at public institutions. These spaces are highly coveted, as tuition is free or very low (for evening classes). This has led to widespread corruption in the admission

Education policy /
R&D
4

process, with enrollment spots going for \$2,500 or more, or reserved for the children of well-connected individuals. Those without the necessary connections or the means to gain one of the few places have to turn to private institutions, which are expensive, and whose quality of teaching is not assured. The job market is thus flooded with young people with formal education and degrees but very limited skills.

University curricula follow the Portuguese, pre-Bologna reform model, with four-year licenciaturas (degrees) and two-year mestrados (equivalent to a master's degree), but only very few courses offer a mestrados track, and there are no provisions whatsoever for postgraduate research. Angolans wanting to pursue studies at the doctoral level have to leave the country to do so. The Angolan Industrial Association (AIA) has plans to develop vocational training with the help of the German government, and there has been talk of developing a higher education institution for agricultural in the Kwanza-Sul province, but those schemes are still very much in their earliest phase of development.

Transformation Management

I. Level of Difficulty

Despite significant economic advances and an oil-driven, post-war reconstruction boom, Angola still faces significant constraints to governance and development. But while the state has the capacity to redress some of these imbalances, it is not clear if it has the political will to do so.

Structural
constraints

6

High poverty and unemployment levels, as well as the lack of a higher qualified workforce, have restricted the socioeconomic advancement of the population to insular, niche sectors of the economy, such as the oil industry, telecommunications and banking. The booming construction sector, by contrast, which could employ a number of low-skilled Angolan workers, has been characterized by an influx of Chinese, Brazilian and Portuguese contract workers. Furthermore, while roads and railroads have been rehabilitated to a large extent across the country, they have so far not yet resulted in improving the distribution of domestic agricultural produce. Thus, local production still faces numerous road blocks on the way to Luanda, and it often remains less expensive (if still very costly) to import foodstuffs from abroad than to transport them cross-country. Finally, the concentration of at least a third of the population in the capital Luanda, and half of the population in cities, has led to challenges in urban development, where large parts of the urban population live in informal neighborhoods, with no regular access to electricity, clean water, sanitation, health care and formal employment. Generally, the costs of living are very high, and people spend most of their energy and income on feeding their families. Official HIV adult prevalence rates, by contrast, are regionally low, at 2%. While this is explained by the isolation of the country during the civil war, it is more likely due to under-reporting and under-testing, and rates are rapidly rising in urban areas and along the main transport corridors from the southern border.

Angolan civil society has long been hampered by political and structural constraints. During socialism, no independent civil society organizations outside the purview of the party-state were permitted; the MPLA controlled the population through mass-based organizations such as the Organization of Angolan Women (OMA), the party's women's wing, the Angolan Pioneer Organization (OPA), its youth wing, or the National Union of Angolan Workers (UNTA), the only legal workers' union. The only space for the autonomous organization of society was to be found in churches.

Civil society
traditions

8

After the political liberalization of the early 1990s, the NGO sector burgeoned, but it is still subject to numerous administrative hurdles and relatively strict government control. Through this, the government has allowed for the controlled growth of an “organized civil society” for delivery of services to the population in decidedly non-political areas, such as water and sanitation, food security and community health. Only a few independent associations, however, have addressed more political issues, such as human rights, elections and social justice; these groups are usually subject to harassment and legal constraints. By contrast, the government has also directly or indirectly created “civil society associations” with close links to the regime, the main aim of which is the delivery of services and the whitewashing of the image of the president. Churches, too, have been embraced by the government since the end of the war, and played a supportive role during the 2012 elections. 2011 and 2012 saw the emergence of a “non-organized civil society,” where dissatisfied citizens started to voice their concerns without being embedded in formal associative structures. There appears to be a growing political awareness among urban youth, a generation less marked by the fear of a return to war than their parents. However, these youth demonstrations have been met with increasing intransigence; demonstrators have been abducted, intimidated, beaten and illegally imprisoned.

While the civil war led, in parts, to an “ethnicization” of the Angolan conflict, dividing the population along ethno-regional fault lines, since the end of the war ethnic or religious cleavages have played a minor and diminishing role. With the exception of the low-level separatist conflict in Cabinda, and a small political movement for greater federalist autonomy in the eastern Lunda provinces, political programs do not appeal to particular interests based on identity; the unity of the nation is constantly stressed, even if in practice, imbalances do exist, especially between urban and rural areas.

However, the political sphere is deeply polarized, between the ruling MPLA party and opposition parties. Due to the dominance of the MPLA, opposition politics in parliament have been largely ineffective. Because of the glaring, growing social inequalities between a large part of the population and the small but politically connected elite, social tensions are rising, especially among the young, urban population. With a government that appears, despite populist rhetoric to the contrary, mainly concerned with self-enrichment, disconnected from the realities of the population and increasingly less tolerant of expressions of popular discontent, the potential for social conflict, including violent confrontations, is in fact high.

Conflict intensity
4

II. Management Performance

14 | Steering Capability

In terms of strategic policies – resource exploration, foreign policy and the maintenance of political power – the government has been remarkably consistent in defining and maintaining its goals. In economics, for example, the National Bank of Angola, which is subordinated to the Ministry of Finance, has stabilized the kwanza and curbed inflation, while replenishing foreign exchange reserves that had been depleted in the 2008 and 2009 world financial crisis. Equally, state oil company Sonangol, the government’s main income earner, is managed professionally and follows market economy principles, although international transparency standards are not adhered to.

Social spending programs, on the other hand, have been marked by pre-electoral, short-term mindset and unsuccessful implementation. The MPLA’s 2008 promise to build one million social houses within the coming four-year legislature has largely failed: some houses were built, while in other areas the government allocated plots for “guided self-construction.” “Model cities,” such as the Chinese-built Kilamba neighborhood in Luanda, stayed empty as property prices soared to triple the originally announced buying prices. And yet the MPLA promised to build two million new houses if re-elected, ahead of the 2012 elections. Equally, water and energy delivery have been a constant problem in Angola, especially in the capital Luanda. During the war, shortages were always blamed on rebel sabotage, but 10 years after the end of the war, the situation is as dire as before. While Luanda residents were happy to note some improvements ahead of the August 2012 elections, the city was beset by a dramatic water shortage and power failures from September onwards. The government first blamed the shortage on a severe draught; when Luanda was flooded by heavy rainfalls a few weeks later, authorities asked the population to be patient, as infrastructures were still “recovering from the war,” and recommended they should buy power generators in the meantime.

For a long time, the implementation of government programs has been hampered by a bloated and ineffective bureaucracy. The heavy inheritance of both Portuguese colonialism and socialist dirigisme, combined with a strong tendency to nepotism and political favoritism in appointment and tendering procedures, has impeded the development of an efficient, competent administration, capable of implementing government policies. Furthermore, while frequent government and administrative reshuffles have kept civil servants on their toes, these moves have also undermined any willingness to make independent decisions or take any risks in the

Question
Score

Prioritization
5

Implementation
5

implementation of policies; everything has to be sanctioned from above, further contributing to administrative inertia.

Nonetheless, a new generation of younger, foreign-educated functionaries has returned to Angola with Western ideals of efficiency and management of public resources; combined with the gradual informatization of resources, improvements have been noted in certain ministerial departments or services. However, the weight of the “old guard” as well as widespread corrupt practices are hard to root out and have hindered greater effectiveness in implementing stated policy goals of transparency and efficiency. In the case of presidential decrees, however, or areas that are policy priorities (oil industry, foreign affairs and defense), implementation is swift, if not always very sustainable.

Policymaking often follows political imperatives, rather than empirical evidence or learning from previous experience. Urban or industrial development policies are good examples of this tendency. Over the last few years, these have tended to follow Chinese ideals of fast, government-driven development, resulting in projects that are often inadequately adapted to local realities. Furthermore, consultancy contracts are often attributed to companies with close links to the political elite, casting further doubt about the independence or validity of their recommendations. Independent reviews, for example, of the budget by the Center of Scientific Studies and Investigation at the Catholic University, which publishes yearly reports, have so far been met with little interest among political decision-makers. However, some improvements with regard to accounting discrepancies between the different budgetary units of the administration have been noted after the 2010 debt crisis, thanks to assistance from the IMF.

Policy learning

5

15 | Resource Efficiency

Frequent administrative reshuffles have hindered the efficiency of government or the development of institutional routines. Indeed, whenever a minister is replaced, heads of department are usually also changed, which in turn entails a “reorganization” of the entire department, impeding institutional learning processes. Equally, as mentioned earlier, appointments are often made as a consequence of personal or political favoritism. Finally, payrolls are often bloated by “phantom workers,” especially in education, health care and the military, whose salaries are funneled away into private pockets. Overall, human resource capacities are weak, although the government has harnessed the available talent in “islands of excellence,” such as in the state oil company, Sonangol.

Efficient use of assets

4

The state budget is characterized by high levels of non-transparency. An IMF report in December 2011 revealed a discrepancy of \$32 billion between petroleum production earnings reported by state oil company Sonangol and the Ministry of

Finance. In May 2012, the government said \$27.4 billion could be explained due to poor record-keeping at Sonangol, which had spent the money on behalf of the government on housing, roads and railways.

The decentralization process, supported by foreign partners, has so far yielded mixed results. In fact, the budget autonomy of provinces has so far mainly meant that provincial governors, appointed by presidential decree, receive their funds from Luanda, with little accountability or responsibility toward their province's constituents. Local elections, promised since the first legislative elections after the war in 2008, have repeatedly been postponed until "sufficient conditions have been created", most recently to 2015.

President Dos Santos remains the ultimate arbiter of any policy decisions in Angola. In fact, much of the stability of his rule is because he has fostered overlapping, competing competencies among various government bodies. In a few cases, the appointment of a specialized taskforce or commission has yielded better results if granted the authority to overrule the ministries, but more often adding another layer of competition. Overall coordination between different services is low and circumscribed by the strong hierarchization of the administration, leading to little delegation of responsibilities. Only in the domain of oil production, the government's main income earner, have processes been streamlined. The state oil company Sonangol has acted highly efficiently, following Western business models and uncoupled from policy imperatives since independence.

Policy
coordination
5

Despite the government paying lip-service to anti-corruption measures, high-level and petty corruption are pervasive in Angola. A "law of public probity," enacted in early 2010, saw the departure of a few prominent members of cabinet and the legislature before it was implemented, but since then, politically connected individuals have pursued their business interests unhindered by any legal obstacles.

Anti-corruption
policy
2

Tenders are rarely publicized, and routinely given to either companies owned by regime figures or following the payment of hefty kickbacks along the decision-making chain. The ruling MPLA party benefits from access to state funds to promote its image, while officeholders are widely known to partake in any substantially lucrative business venture, without ever declaring their assets. In an unprecedented move, the presidential candidate for the main opposition party UNITA, Isaias Samakuva, publicly declared his assets ahead of the 2012 elections, hoping to pressure President Dos Santos to do the same, but nothing came of it. Equally, in December 2011, the Angolan investigative journalist and activist Rafael Marques filed a criminal complaint for embezzlement and influence peddling against three high-ranking regime figures with the Office of the Public Prosecutor, but the case has not been followed up.

16 | Consensus-Building

To the extent that both democracy and a market economy are highly normative goals, there exists a widespread normative consensus among government and opposition politicians on the desirability of achieving these goals. Substantial democracy, however, would entail a willingness to share power or at least enter a meaningful dialogue with citizens and opposition. Similarly, a market economy would signify the creation of a level playing field, with transparent rules. In that sense, while all actors formally and rhetorically agree on the goals, their fundamental commitment to the substance of the goals can be doubted. And while the opposition has ahead of the 2012 elections begun to attack the government more frequently on questions of substance, it remains an open question whether the opposition's practices would differ from the government's, in case of participating in or coming to power.

Consensus on goals
5

The main anti-democratic actors are the president and a tight-knit coterie of family, business partners and political allies that surround the president. Despite rhetoric in favor of democracy and a market economy, the country's elite has monopolized political and economic power for their own benefit and is increasingly ruling the country like a private enterprise. Generally speaking, there are no stated adversaries of democracy or a market economy, even among the few local activists who promote the greater political significance of regional traditional kingdoms (Bailundo, Lunda-Chokwe, and Kwanyama, as a few examples).

Anti-democratic
actors
3

As mentioned above, ethno-regional and religious cleavages have become increasingly irrelevant since the end of the war, and the political leadership has so far managed to defuse and/or repress or gloss over remaining ethno-regional grievances with a mixture of educational and cultural programs, military force and infrastructure spending. However, in the case of Cabinda, those strategies have only had limited success, as a low-level separatist guerrilla movement continues to be active. Furthermore, some of these sentiments remain dormant and could be exploited by political actors for populist goals.

Cleavage /
conflict
management
5

The main cleavage today is social, and despite the burgeoning of a small, independent middle-class in larger cities, the gap between the majority of poor citizens and a tiny elite of ultra-rich is growing. While the ruling MPLA has adopted the issue of wealth distribution as a campaign slogan for the 2012 elections, it remains to be seen if the new legislative period de facto improves the opportunities for the majority of urban poor and disenfranchised rural population. While opposition parties have so far refrained from mobilizing on the basis of those grievances, regular, if still small, youth protests in the cities since March 2011 indicate a high potential for civil unrest.

Since the openings to multiparty democracy in the 1990s, the government has opened up legal spaces for the existence of civil society organizations. Yet while NGOs and church associations during the civil war period actively promoted an end to the conflict and a broad national reconciliation, such freedoms have increasingly been restricted since 2002. The government tolerates “organized civil society,” such as registered NGOs and associations, working as service providers in sectors where the state is absent (community health, education, water & sanitation, rural development). However, civil society as a political interlocutor is increasingly marginalized and repressed. Associations active in the areas of human or civil rights, democratic participation or transparency and anti-corruption are either ignored or face numerous administrative hurdles and restrictions, up to politically motivated charges for defamation, for example. The few instances where civil society has contributed to policy design and agenda setting, such as the often-cited reform of the land law in 2002, which was drafted with civil society input, have been mainly cosmetic. Only at the local level, small projects to improve the responsiveness of local administration to the needs of the population have had some limited success.

Civil society
participation
3

Since independence, the MPLA party has monopolized the history of the Angolan liberation struggle to present itself as the party that “won” independence for all Angolans while obfuscating the role of the two other anti-colonial liberation movements, UNITA and FNLA. The Angolan government since the end of the war has successfully recast the issue of national reconciliation in the public discourse as a purely technical question of infrastructure reconstruction. By portraying the MPLA as the party of stability and economic growth, and President Dos Santos as the “Architect of Peace,” this dominant discourse conveniently obscures the MPLA’s own role in the Angolan conflict and the past crimes committed by people still in power: namely the purges following the 27 May 1977 “coup attempt” or demonstration (the infamous “27 de Maio”) and the mass killings of ethnic Bakongo as alleged UNITA supporters in Luanda in the aftermath of the failed 1992 elections (“Halloween massacre” and “Bloody Friday”). At the same time, the ruling party squarely places the blame for the wartime loss of lives, population displacement and infrastructure destruction on the main opposition party, UNITA. Any public debate over the conflict is prohibited by stressing that “stability” and “tranquility” are the greatest “gains of peace,” which, according to the regime, such a debate would jeopardize. So far, the population at large, as well as opposition voices and churches, seem to have bought into this stability discourse, and any discussion of reconciliation, if at all, is limited to the private sphere.

Reconciliation
2

17 | International Cooperation

Angola has an ambivalent relation to foreign partnerships. In the oil industry, the expertise and know-how of Western oil companies has been vital to developing the sector; in the security and defense sector, Cuban, East German and Romanian expertise in the 1980s and Israeli assistance since the 1990s have greatly increased the “persuasiveness” and technical capabilities of the state security service and the operational strength of the Angolan Armed Forces. Cuban and Vietnamese doctors help prop up the still understaffed health sector, and Portuguese, Brazilian and Chinese know-how in the construction sector has contributed to the reconstruction of the country.

Effective use of
support
4

However, Angola has for a long time refused to enter an arrangement with the IMF or the World Bank, and only accepted an IMF standby-agreement in 2010 after its foreign exchange reserves had been depleted due to a fall in world oil prices; a later loan offer by the IMF in 2011 was however refused again. The country’s partnership with China is in that respect probably the most revealing. In exchange for oil-backed credit lines, Chinese construction companies are rehabilitating Angola’s road and rail network and some airports, and building entire new urban developments on behalf of the government. However, these construction projects are often little adapted to local realities – roads, for example, hardly withstand one rainy season – and the financial ramifications of such deals are highly non-transparent, simply serving select members of the elite as vehicles of personal enrichment.

The government seeks a modicum of international respectability and the diversification of partnerships. Thus, despite substantial shortcomings and crushing electoral victories by the ruling party, the two “successful” democratic elections since 2002 have greatly improved Angola’s regional and international standing. Bolstered by oil revenues, Angola’s stupendous economic growth has attracted foreign investment and allowed for the servicing of its debt. While Angola’s economic standing has no doubt improved, its aspiration to be seen as a “model democracy” is undermined by non-transparent elections and endemic corruption. Thus, for example, the United States congratulated the Angolan people for its peaceful 2012 elections, but withheld their congratulations to President Dos Santos and his new government. However, as many crisis-stricken Western economies have become dependent on Angolan oil and/or investment, they have also become less vocal in their criticism of the Angolan government.

Credibility
5

Angola’s chairing of the Southern African Development Community (SADC, 2011 – 2012) and the Community of Portuguese-Speaking Countries (CPLP, 2010 – 2012) was hailed domestically as great successes of Angolan foreign policy. Angola is also a member of the African Union (AU), the Economic Community of Central African States (ECCAS), and the Gulf of Guinea Council (GGC), as well as of the WTO and

Regional
cooperation
6

OPEC, and aims to be an influent and constructive player in those organizations. However, the example of SADC also shows the limits of Angolan regional integration. While the government was quick to claim authorship for SADC initiatives, such as the mediation in the political crises in Zimbabwe and Madagascar (where it was only marginally active), it still delayed Angola's adherence to the SADC free-trade zone to protect Angolan industry from South African competition. Furthermore, when the SADC Summit was held in Luanda, independent journalists from Mozambique were barred from entering the country even though they had valid visas. Still, the Angolan Armed Forces have repeatedly intervened in the neighboring Democratic Republic of the Congo in defense of President Kabila, and Angola also contributes to the SADC regional standby brigade.

Strategic Outlook

Angola's main challenges are the diversification of its economy away from oil, a fairer distribution of wealth among its population, and the succession of long-standing President Dos Santos. These three issues are intrinsically linked. Many, even inside the ruling MPLA party, feel that Dos Santos and his family have become "too greedy," monopolizing much of the revenues of Angola's economy, across all important sectors. Despite these concerns, Dos Santos was able to impose his choice for vice presidential candidate in the 2012 elections, the former CEO of state oil company Sonangol, Manuel Vicente, against the opposition of the party's "old guard." The new constitution would allow Dos Santos to step down during his mandate and hand the presidency over to Vicente, who is also Dos Santos' nephew by marriage and therefore likely to protect the vast business interests of the Dos Santos family, without any popular or parliamentary confirmation. The MPLA's electoral victory, however, indicates that Dos Santos intends to complete his full mandate.

This, in turn, is unlikely to placate the growing dissatisfaction of urban youth, concerned with the country's rampant poverty and unemployment, the dearth of available spots at the universities and the lack of basic services, as opposed to the self-enrichment and ostentatiousness of the elite. Unless the new MPLA-led government actually makes good on its electoral promise to "distribute better" and significantly improves the living conditions of the population, Angola is heading for social conflict. And while opposition parties have increased their seats in parliament, it remains doubtful whether the ruling party will engage in a meaningful, constructive dialogue with the opposition to find solutions for or whether the MPLA-dominated parliament remains a mere rubber-stamp assembly, approving presidential decrees.

Thus, the diversification of the economy is unlikely to fundamentally change the country's outlook. While the government is keen to attract investment in non-oil business sectors, offering tax breaks and reforming, for example, the mining code to offer greater legal security to investors, the participation of politically well-connected individuals in every lucrative new business venture still remains the common characteristic of all substantial economic activity in Angola. As long as Angola's leaders continue to manage the country like a private enterprise for their personal profit instead of governing it for the benefit of the population, their commitment to a market economy and democracy must be doubted. Rumors are growing that Dos Santos is in fact maneuvering toward a dynastic succession, building his son José Filomeno "Zénu" Dos Santos as a possible successor.

Recommendations to address this situation include both the political and the social. Opposition parties and youth activists should maintain pressure on the government to make it more accountable and responsive to the needs and demands of the population. Making meaningful dialogue between opposition leaders and reform-oriented members of the MPLA a goal would go a long way to transforming the way politics are played out in parliament and in public debate.

Importantly, offering President Dos Santos the chance to step down gracefully, with immunity from prosecution, could be one way to avoid conflict, before a popular revolt ousts him from power. The government's pursuit of further reforms toward transparency and accountability are also crucial, of which a more independent judiciary, capable of indicting and prosecuting powerful regime figures, would be the first precondition. And last but not least, improving media freedoms and access to information would further support Angola's continued democratic transformation.

As long as the "System Dos Santos" is propped up by oil revenues, however, these suggested changes will only be gradual. International pressure for greater transparency and regime change, for example, is unlikely as long as Angola is impermeable to economic pressures – and Western powers are dependent on Angolan oil. The system needs to change from within. Perhaps a new generation, less affected by the weight of past conflicts, with better access to education and information, will forcefully demand its rights.