

# 1. Mapping Change in Africa

Giovanni Carbone

---

Africa is a large and complex continent made up of fifty-four sovereign states, including some island countries, extending over a land area one hundred times the size of Italy. Major cities such as Rabat in Morocco and Antananarivo in Madagascar, or Cape Town in South Africa and Cairo in Egypt are separated by 7,000 to 8,000 kilometres and wildly different political, social and economic histories. Yet there is no lack of aspects that different countries – or groups of countries – in the area share. Some have to do with their pasts, some with their current trajectories, and others with a foreseeable common future. The latter include the many opportunities and challenges that multiple processes of fast change are generating across the continent.

This chapter offers an evidence-based overview of the major transformation processes presently underway in Africa: from demographic expansion and fast urbanisation to economic development, from social progress to environmental challenges, from technological innovation to continental integration, from political change to migratory pressures.

## Demographic expansion and fast urbanisation<sup>1</sup>

Prompted by longer life expectancy and just a marginal decline in fertility rates, Africa's population is set to double in the next three decades, accounting for more than ¼ of the world population in 2050. This growth will mostly involve urban centres,

---

<sup>1</sup> All data were retrieved from United Nations Population Division Department of Economic and Social Affairs, *World Population Prospects: The 2017 Revision* and *World Urbanization Prospects: The 2014 Revision*, unless otherwise stated.

whose population will outpace the rural by the late 2030s.

**Africa's population is increasing sharply.** The continent has a lower population density (40 people/km<sup>2</sup>) than the EU (125), China (147) or India (445). Yet looking at population growth rates, with the highest rate of annual expansion (2.7%) Africans quintupled from 229 million in 1950 to 1.2 billion in 2015, and will drive world population growth in the coming decades, contributing to 56% of global population growth in the next 35 years. Today's 1.2 billion inhabitants are expected to double to 2.5 in 2050 and close the gap with Asia (4.5) by 2100. Today's demographic powerhouses in the region are Nigeria, Ethiopia and Egypt, but by 2030 other African countries will have grown impressively: Congo-Kinshasa will have a population of 125 million, Tanzania 87 million, small-sized Burkina Faso 28 million.

**The main drivers behind this trend are manifold.** Among them, the sharp drop in infant mortality rates (from 180 deaths per 1,000 live births in 1990 to 78 in 2016<sup>2</sup>), still stubbornly high fertility rates (despite slightly declining, they will remain above 3 children per woman until 2050), and longer life expectancy (60 years in 2015, 10 years more than in 1990<sup>3</sup>). With an astounding average of 7.6 children per woman – the world's highest fertility rate – Nigeriens will triple to almost 70 million in 2050.

**As a result, sub-Saharan Africa's age structure is young** and is set to remain so for years to come. Until 2035 the under-20 (today 51.3%) will still account for more than half of Africa's population, whereas until 2050 Africa's median age will remain under 25, and will hit 35 only in 2100, still the lowest in the world.

**Africa also leads the world with the highest urban growth rate** (3.42% in 2015-2020). In 2035 the urban population will have caught up with the rural. Moreover, by then Africa will

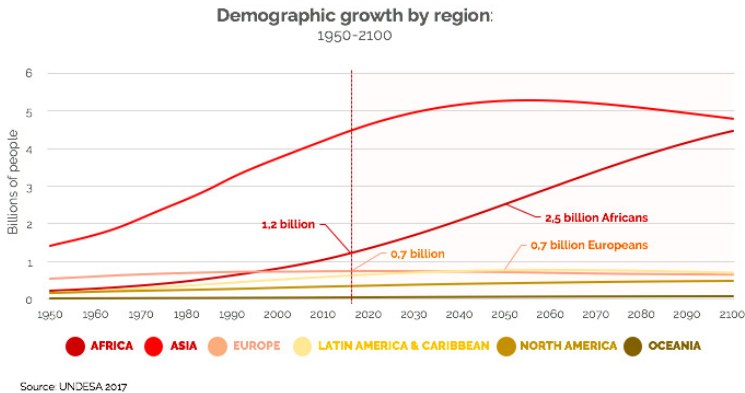
---

<sup>2</sup> World Bank, World Development Indicators (accessed 2018).

<sup>3</sup> *Ibid.*

have six of the world's top megacities with over 10 million citizens each (Cairo, Lagos, Kinshasa, Luanda, Dar es Salaam, and Johannesburg), yet most of the urbanisation process will take place in mid-sized urban centres<sup>4</sup>. Finally, while urbanisation can also be viewed as a boon for economic development, it is estimated that, in sub-Saharan Africa alone, the urban population living in slums (today around 62%) may triple in size by 2050.

FIG. I - DEMOGRAPHIC GROWTH BY REGION (1950-2100)



Source: UNDESA, 2017

## Political change and democratic renewal

Multiparty elections are today the rule across much of Africa. While in a number of countries they are strategically used by non-democratic parties to hold on to power, in several states they have allowed a degree of political renewal and more genuine democratic processes.

<sup>4</sup> AfDB, OECD, UNDP, *African Economic Outlook 2016: Sustainable Cities and Structural Transformation*, Paris, OECD Publishing, 2016, p. 148.

**Electoral politics is the new normal in Africa.** African politics and regimes made significant democratic progress beginning in the early 1990s. After three decades during which authoritarian rule was largely coupled with widespread corruption and economic failures, the continent replaced virtually all its military and one-party systems with multiparty regimes. In the new millennium, elections have been the new normal in Africa. South of the Sahara, Eritrea and Somalia have remained exceptions in not allowing their citizens to vote. Some North African countries tried to take a similar path more recently, but the so-called Arab Spring did not bring about real and stable political openings beyond Tunisia.

**Military interventions in politics are not yet a thing of the past in Africa,** as demonstrated by the coups in Egypt, Burkina Faso and Zimbabwe in recent years. But the frequency of African coups has seen a steep decline. During the 1980s, 17 coups accounted for about 51% of all leadership turnovers. The frequency of coups subsequently shrank, although they certainly did not disappear. In the decade and a half since 2000, soldiers seized power on twelve distinct occasions in nine states (Guinea-Bissau and Mauritania suffering two coups each). Moreover, after every recent takeover, the military hastened to promise that they would hold fresh elections within a relatively short time and mostly did so within one or two years.

**The actual depth and meaning of multiparty politics and elections varies wildly across the continent,** however. Unchallenged hegemonic-party rule prevails in the likes of Algeria and Ethiopia, Togo and Angola, as well as in many other places where political and voting processes are controlled by ruling parties to make sure they remain in office. Violent repression of dissenting voices is occasionally part of the picture. Yet in other parts of Africa multipartism opened up unprecedented avenues for political change. Across the continent, opposition parties won office at the ballot box as many as 40 times in 1990-2015 – more than once in places such as Ghana and Kenya, Benin and Senegal – as against just three times over the previous

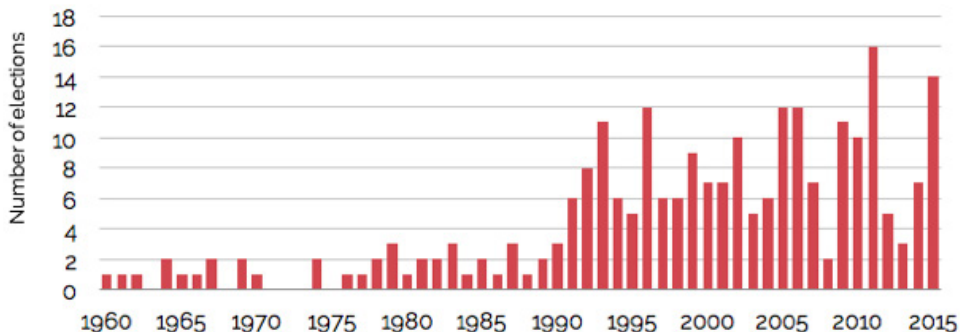
thirty years. Short of opposition victories, constitutional term limits often helped ensure a degree of rotation in office by presidents hailing from the same ruling party, a softer kind of succession in office that occurred on 37 occasions (1990-2015), both in countries deemed democratic (South Africa, Namibia and Botswana) and in countries that are not (in Mozambique and Tanzania, for example, and most recently also in Angola).

**Respect, or lack thereof, for constitutional limits to presidential mandates** has become one of the most contentious political issues in the new millennium. During their transitions to multipartism, many countries introduced a two-term limit to eschew the president-for-life syndrome that had affected part of the region in the past. A majority of African leaders did subsequently abide by this provision. And when the incumbent leaders of Cameroon, Burkina Faso, Uganda, Rwanda, Togo, Chad, Burundi and other countries approaching the end of their mandates were allowed to stay in office, they had to steer through controversial constitutional reform bills that eventually permitted them to retain power.

## **Growth performances and economic transformations**

After unprecedented economic growth during the first decade and a half of the new millennium, Africa as whole was hit by a slowdown in 2015-2016 due to changed global economic conditions. In the current scenario, country trajectories are becoming more diversified, with growth prospects remaining strong for some nations while other economies struggle to keep pace.

FIG. 2 - MULTIPARTY ELECTIONS IN AFRICA (1960-2015)



Note: presidential elections only (legislative elections are included for parliamentary regimes)

Source: ALC database

**Emerging Africa: a new narrative of the continent's prospects.** African economies grew at an unprecedented average annual rate of around 5% in the 2000-2014 period (5.5% for sub-Saharan countries). Rooted in the political and economic reforms of the 1980s and 1990s, as well as in a favourable commodities super-cycle, growth was not only sustained over a significant period of time, but also largely cut across countries and sectors. It was not just Angola or Ethiopia, but also Chad, Rwanda or Sierra Leone; not just energy and mineral commodities, but ICTs, agriculture and other sectors too. The impressive growth rates fed into a new "Africa rising" narrative and image emphasising dynamism and opportunities.

**Less favourable international economic conditions in 2015-2016 led to the emergence of a new multi-speed growth scenario.** A partial slowdown and rebalancing in China caused a fall in the demand and price for a number of commodities. Africa's exports to China decreased by about 40% in 2015, a decline that continued through 2016. In 2015 Africa's oil exports dropped by some 41% from the previous year, the major such

contraction since 2000<sup>5</sup>. Hard-hit countries included regional giants Nigeria, South Africa and Angola as well as much smaller economies such as Equatorial Guinea, Zimbabwe or Burundi. Meanwhile, average public debt in sub-Saharan Africa went up ten percentage points to 42% of GDP between 2014 and 2016, becoming an issue in places such as Ghana, Zambia or Mozambique. At the same time, other countries – particularly non-oil economies such as Côte d’Ivoire, Ethiopia, Kenya, Mali, Rwanda, Senegal and Tanzania – showed impressive resilience, displaying good growth performance and prospects<sup>6</sup>. This resulted in a situation in which growth paths are less homogeneous than they had been in the recent past. A situation variously described as “two-speed growth” or “multispeed growth”<sup>7</sup>: Africa’s economic trajectories are becoming increasingly diversified.

**Economic recovery will stabilise at more moderate growth levels, the result of heterogeneous growth performances.** After hitting the lowest point of economic growth in 2016 (1.3% for sub-Saharan Africa), 2017 was a year of economic recovery (2.8% for sub-Saharan Africa). Nigeria, the largest market on the continent, was in full recession at -1.5% in 2016, with a modest rebound to 0.8% in 2017. Slower continental growth is the result of increased heterogeneity in growth performances. Some countries will continue struggling to achieve high growth rates, others will head onward at full speed. Ten of the twenty economies that are expected to record the highest growth rates over the five years 2018 to 2022 are in Africa (all of them south of the Sahara). Many are small markets, but they also include Ethiopia, Côte d’Ivoire, Ghana, Tanzania, Senegal and Uganda<sup>8</sup>.

---

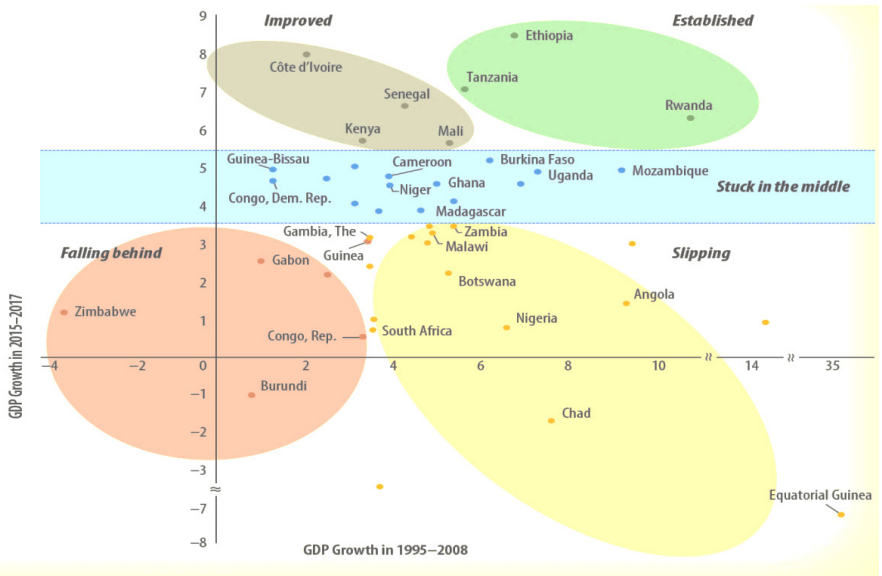
<sup>5</sup> AfDB, OECD, UNDP, *African Economic Outlook 2017: Entrepreneurship and industrialisation*, Paris, OECD Publishing, 2017, p. 77.

<sup>6</sup> World Bank, *Africa’s Pulse*, vol. 15, Washington D.C., World Bank Group, April 2017, p. 21.

<sup>7</sup> “The Great Growth Divide”, *Africa Confidential*, vol. 58, no. 12, June 2017; and Ernst & Young, *Connectivity redefined*, 2017.

<sup>8</sup> IMF, *World Economic Outlook Database*, October 2017.

FIG. 3 - AFRICA'S HETEROGENEOUS GROWTH TRAJECTORIES



Source: World Bank, *Africa's Pulse*, 2017

## Technological innovation

Despite lagging behind advanced and other emerging countries, Africa is finding its own ways of benefitting from the technology revolution, and this is increasingly happening by skipping inefficient or costly solutions and directly adopting the more technologically advanced.

**The digital-divide challenge for Africa.** The revolution of connectivity and the digital transformations that swept through advanced economies sparked early fears of a widening digital divide, with developing countries struggling to keep pace with fast technological innovations. Poorer individuals, peoples and societies did not simply risk being left behind, they risked being left out altogether. The “digital divide” duly became real. As the fourth industrial revolution blurred boundaries between



manufacturing and services, even the notion that rising wages in emerging economies would lead to a relocation of manufacturing towards Africa was questioned. As global value chains are transformed, jobs may be transferred to robots rather than to Africans.

**Africa is taking part in the technology revolution.** Alongside the many challenges, the new technological transformations are also showing unforeseen and massive potential as positive game changers for Africa's economic and social development. The disruption brought about by "successive waves of the ICT revolution (PC, online, mobile, social) have democratised data, empowered consumers and citizens and spawned scores of new industries. The impact of this disruption has been felt nowhere more than across Africa"<sup>9</sup>. If part of the continent was indeed left out, another part joined the revolution, and on occasion even plays a leading role. The African Union, for example, has adopted Rwanda's rapid digitalisation strategy as a model for the whole continent<sup>10</sup>.

**Africa's leapfrogging opportunity.** As the rapid spread of mobile phones demonstrated an unanticipated capacity for bypassing old and dysfunctional landlines, giving hundreds of millions of Africans their first access to communication networks, the potential for new technologies to help leapfrog inefficient solutions became apparent. Mobile penetration rose by more than forty-three times between 2000 and 2016, from 1.7 to 74 subscriptions every 100 people, with peaks in countries such as Egypt, Tunisia, Nigeria, Kenya, Senegal and Ghana<sup>11</sup>. It offered immense opportunities for virtually every activity and situation, from businesses to migrants, from rural farmers to urban services. In a similar way, the introduction of "mobile money" allowed Africans to perform financial transactions and

---

<sup>9</sup> Ernst & Young (2017), p. 21.

<sup>10</sup> Infrastructure Consortium for Africa, *Infrastructure Financing Trends in Africa 2016*, Abidjan, 2017, p. 21.

<sup>11</sup> J. Pushter, *Smartphone ownership and internet usage continues to climb in emerging economies*, Pew Research Center, 22 February 2016.

services without waiting for the development of physical banking infrastructures.

**The multiplication of creative, innovative and diverse development initiatives.** Opportunities for applying innovative, technology-based strategies to solving development problems are multiplying and becoming ever more creative. Africa's costly and unreliable provision of electricity through traditional power grids, for example, is being gradually challenged by mini- or micro-grids. Cheaper solar panels make the technology increasingly affordable for poor rural households. Other experiments seem to point up how innovation can help bypass additional infrastructure bottlenecks such as the scarcity of paved roads. Drones, for example, are used for on-demand deliveries of blood for transfusion to hospitals across Rwanda as well as for mapping and monitoring "precision farming" in Côte d'Ivoire. Big data and crowdsourcing are also increasingly used in very diverse fields, from traffic congestion monitoring to the quick reporting of crisis situations and the mapping of violence in conflict areas.

## Infrastructural development

Infrastructures have historically been a major bottleneck in Africa's development. From transportation to energy, from water distribution systems to ICT grids, the deficit of Africa's infrastructures almost systematically hinders economic activities and social progress in the continent, despite important intra-regional variations. Yet important infrastructure projects reshaping Africa are on the rise.

**A solid infrastructure system is at the core of economic and social development, but requires massive investments.** According to the World Bank, bridging Africa's infrastructure gap with the rest of the developing world would raise Africa's per capita GDP by 1.7% per year<sup>12</sup>. Yet Africa still performs poorly in infrastructure. On the positive side, since 1990 some progress

---

<sup>12</sup> World Bank, *Africa's Pulse...*, cit.

has been made in telecommunications coverage and in access to clean water. However, over the past decade Africa's infrastructure gap not only with advanced economies but also with the rest of the developing world has widened. Its performance in transportation and in energy supply dropped respectively by 6% and 3%<sup>13</sup>. Road density is lower than in the 1990s, only 37.4% of sub-Saharan Africans have access to electricity<sup>14</sup> and Africa consumes only 3.3% of global primary energy despite having 16% of the world's population<sup>15</sup>. Similarly, gaps with other world regions in the ICT sector have worsened, especially regarding broadband connections and prices. Only one African in five has regular internet access<sup>16</sup>. Clearly, there are huge intra-regional variations – Africa's 16 landlocked states lag much behind South Africa in terms of infrastructures – but even the continent's top performers are still unable to catch up with international standards.

**Financial limits remain the most serious constraint to infrastructure development**, but regulatory restrictions can likewise represent important obstacles. In 2016 total funding in Africa's infrastructure decreased by 21% compared to the previous year<sup>17</sup>. According to estimates, Africa would need an annual outlay for infrastructure ranging from US\$120 billion to US\$174 billion (at 2015 dollar rates). But recent years' commitments only averaged around US\$74-83 billion yearly in 2012-2015, before slipping to US\$62.6 billion in 2016. More than half of infrastructural commitments in 2016 (58%) were allocated by external finance (Infrastructure Consortium for Africa (ICA) members 29.8%, Arab funds 8.8%, China 10.3%), leaving to African national governments 42% of overall commitments. The downward trend of 2016 was in line

---

<sup>13</sup> World Economic Forum, *The Africa Competitiveness Report*, 2017, p. 12.

<sup>14</sup> World Bank, World Development Indicators..., cit.

<sup>15</sup> African Development Bank Group, ICA, UNEP, and Sustainable Energy Fund for Africa, *Atlas of Africa - Energy Resources*, 2017.

<sup>16</sup> World Economic Forum, *The Africa...*, cit..

<sup>17</sup> All data in this paragraph are from Infrastructure Consortium for Africa (2017).

with a global economic slowdown and, in particular, reflected a reduction in Chinese funding, halved in comparison to an annual average of US\$12 billion in 2011-2016. Still, China led the way in supporting infrastructural development in a number of African countries. Ethiopia<sup>18</sup>, for example, recently inaugurated a 750km new cross-border railway from Addis Ababa to the Djibouti port on the Red Sea, a US\$3.4 billion project largely financed by China. Data also show that Africa's infrastructure needs are only marginally addressed by public-private and private sector investments, even less so in 2016 when the latter's participation declined by 49%. Overall, the sectors that benefited the most were transports (39.2%), energy (31.9%) and water (16.9%), but significant variations occurred in regions of destination too. Despite declining, South Africa alone collected 9.4% of total infrastructure financing in 2016, almost as much as the rest of southern Africa (10.4%). Still, West and East Africa topped the beneficiaries, receiving respectively 26.1% and 21% of total funding.

**To solve Africa's infrastructural deficit, regional approaches are on the rise.** The African Union adopted a common infrastructural development agenda (Programme for Infrastructure Development in Africa, PIDA). The initiative, which is jointly managed by the African Union Commission, the New Partnership for Africa's Development (NEPAD) Secretariat and the African Development Bank, sets out a vision particularly in the sectors of energy, transportation, ICTs and trans-boundary water resources. The aim is to foster infrastructural progress for regional integration and socio-economic development via a series of national, sub-regional and continental projects to be realised by 2040. A number of giant infrastructure projects are already underway such as, for example, the rehabilitation and upgrade of around US\$12 billion worth of roads and railways in south-eastern Africa<sup>19</sup>; port expansions and construction

---

<sup>18</sup> *BBC News*, "Ethiopia and Djibouti launch first fully electrified cross-border railway in Africa", 4 October 2016.

<sup>19</sup> <https://www.icafrica.org/en/topics-programmes/north-south-corridor/>

in Djibouti, Tanzania and Kenya; urban development plans around capital cities; new dams, among which the Grand Ethiopian Renaissance Dam.

## Social progress

Demographic expansion and fast urbanisation offer both opportunities and challenges. Among the latter, the risk of growing unemployment and poverty. Yet one of Africa's positive stories in the past few decades has been precisely social progress. Human development indicators such as life expectancy and low infant mortality rates have improved, but some divergent trajectories across the continent depict a blurred picture of Africa's social progress.

**Africa's social progress shows both encouraging and unsatisfactory trends.** In 1990 sub-Saharan Africa's extreme poverty share of total population amounted to 54.4%<sup>20</sup>. In 2013, it dropped to 41%, but in terms of absolute numbers it increased from 278 million to 390 million, making Africa the only developing region falling short of halving extreme poverty as set by MDGs targets. As Africa's population grows faster than per capita economic growth, the absolute figure for extreme poverty (less than US\$1.90/day) is likely to continue increasing.

This contrast between absolute and relative numbers also stands out in non-economic poverty indicators in sub-Saharan Africa. Health, nutrition and education have improved over the past twenty years, as adult literacy increased from 51.1% in 1996 to 60.9% in 2016, youth literacy from 66.7% to 75.4%, gross primary school enrolment from 73.4% to 98.7%, life expectancy from 50 to 60 years, whereas the prevalence of child malnutrition dropped from 46.2% to 34.1% and the infant mortality rate from an average of 170 children per 1,000 live births to 78<sup>21</sup>. However, such numbers are still among the worst

---

<sup>20</sup> World Bank, World Development Indicators..., cit.

<sup>21</sup> Data on literacy and malnutrition are from UNICEF databank, while data on primary school enrolment, life expectancy, and mortality rates are from the

in the world. Moreover, large swathes of Africa are still occasionally on the verge of famine. In early 2017, South Sudan declared famine – the first ever since 2011 in Somalia – and over the year at least 28 million people in East Africa<sup>22</sup> and 8.5 million in the Lake Chad region<sup>23</sup> have been in need of humanitarian assistance.

Geographical divergences also concern inequality. Rural areas are still much poorer and unequal than urban centres, although the gap shrank from 35% in 1996 to 28% in 2012<sup>24</sup>. Moreover, inequality, as measured by the Gini index, is higher in southern Africa than the rest of the continent. Overall, Africa hosts 7 of today's 10 most unequal countries<sup>25</sup> but, apart from them, the region's inequality performance is consistent with other developing regions in the world.

**Africa's demographic expansion poses a major challenge to its labour market.** Today 8% of Africa's labour force is unemployed and vulnerable employment concerns 62.5% of total employment<sup>26</sup>. As a result of population growth, Africa's working-age population (15 to 64 years) is set to increase dramatically. To capitalise on this increase and translate it into a demographic dividend that can foster growth, sub-Saharan Africa alone will have to create around 20 to 30 million jobs per year until 2030 to absorb the youth cohort annually entering the working-age group<sup>27</sup>. By then, sub-Saharan Africa will have added 378 million young people to its workforce, that is, more than today's North American population, and by 2050 they will represent two-thirds of global workforce expansion.

---

World Bank.

<sup>22</sup> WorldVision, East Africa hunger, famine: Facts, FAQs, and how to help.

<sup>23</sup> *Nigeria Northeast: Humanitarian Overview*, Reliefweb, Report from UN Office for the Coordination of Humanitarian Affairs, September 2017.

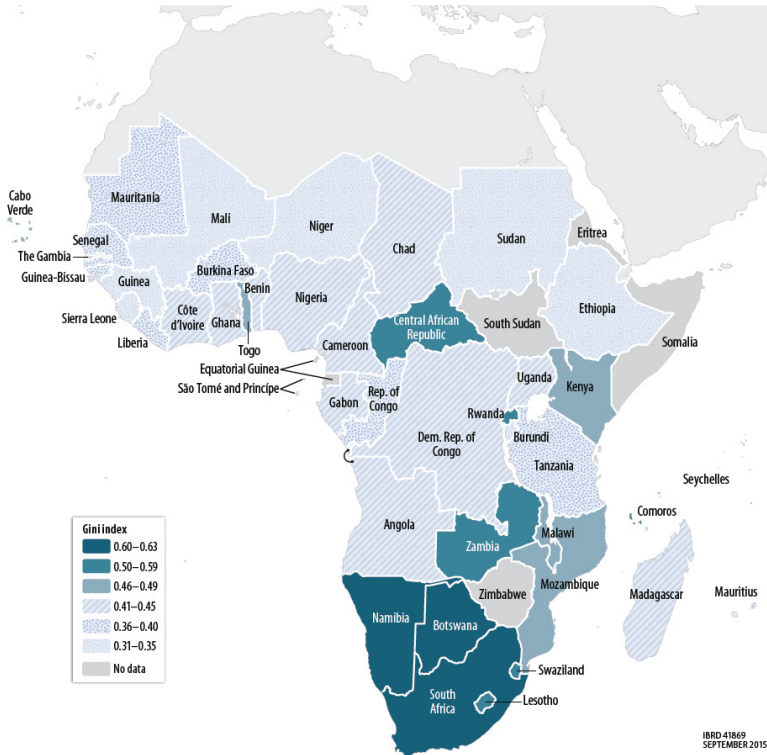
<sup>24</sup> K. Beegle *et al.*, *Poverty in a Rising Africa*, Washington, D.C., World Bank, 2016, p. 10.

<sup>25</sup> *Ivi*, p. 15.

<sup>26</sup> ILO, *World Employment Social Outlook*, Trends 2017, 2017, p. 16.

<sup>27</sup> FAO, *Rural Africa in Motion, Dynamics and drivers of migration South of the Sahara*, 2017, p. 20.

FIG. 4 - INEQUALITY SHOWS A GEOGRAPHICAL PATTERN



Source: World Bank, *Africa Poverty Database*, 2015

## Migratory pressures

The demographic and socio-economic transition that is currently underway in sub-Saharan Africa weighs on migration trends. Migration is influenced by a complex range of factors. Vulnerability to conflicts, poverty and adverse environmental conditions (forced displacement) does play a role, yet African migration mostly comes down to individuals' deliberate choices in search for better life opportunities.

**Structure, evolution and management.** Africa's recent demographic and socio-economic transformations are set to make migratory pressure structural. The growing African youth cohort, underpinned by new technologies and social media, has high expectations which have not been met by jobless growth in recent years or by the modest growth of sub-Saharan Africa's average per capita GDP over the past 40 years (today US\$1,632), which diverges sharply from the EU average (US\$35,632)<sup>28</sup>.

African countries often consider their people's mobility as a development strategy, to decrease unemployment, generate remittances and decrease dissatisfaction. In this direction, arrangements such as visa removals to facilitate intra-regional free movement of peoples have been introduced by several African regional organisations.

**African migration is no exception to global trends and is mostly intra-continental.** In Africa the absolute number of international migrants increased from 21.5 million in 2000 to 32.6 million in 2015 as a result of population growth, yet its share of the total regional population remained stable at around 2.6% between 2000–2015, dropping from 3.2% in 1990, and lower than the world average (3.3% today). Moreover, 50% of Africa's international migrants (and 67% of the sub-Saharan) move within Africa, mostly to neighbouring countries in the same sub-region<sup>29</sup>. This trend also concerns forced displacements: being both a source and destination region of refugee flows, sub-Saharan Africa alone hosts more than 26% of the world's refugees<sup>30</sup>. Finally, regarding internal migration within national boundaries, more and more people, especially the young, are leaving rural areas to move to more attractive urban centres. Internal migration accounts for half of total migration trends in Kenya and Senegal, but it goes up to 80% in Nigeria and Uganda<sup>31</sup>.

---

<sup>28</sup> World Bank, World Development Indicators..., cit. Per capita GDP in dollars (2010 constant prices).

<sup>29</sup> G. Carbone (Ed.), *Out of Africa. Why People Migrate*, Milano, Ledizioni-ISPI, 2017.

<sup>30</sup> <http://www.unhcr.org/africa.html>

<sup>31</sup> FAO (2017), p. 22.



**The migration hump, or the migration-development nexus**, counters common perceptions that see migration as a development failure. Lack of economic development does not necessarily provide incentives for people to move. Quite the opposite: long-distance migration requires financial and human resources. Empirical evidence suggests that higher levels of extra-continental migration occurs in countries with better access to infrastructures, higher GDP per capita, higher educational levels, and that are in advanced stages in the demographic transition<sup>32</sup>. Therefore, it is those with better income and education that are more likely to move. Pouring in economic aid or investments just to raise Africans' wellbeing and stem migration flows may lead to unexpected effects. As the chart of the migration bump explains, only after a certain level of development (over US\$5,000 GDP per capita) do the incentives to migration decrease.

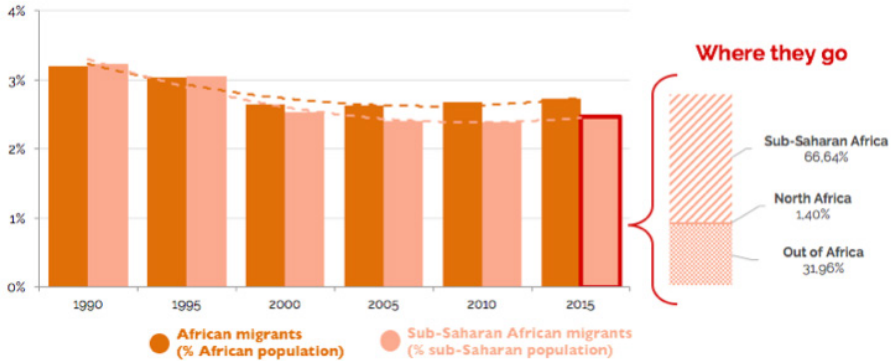
## **Security: conflicts, terrorism, and violence**

Africa is currently witnessing a series of conflicts, terrorist attacks and episodes of violence that apparently contradict the image of a new Africa rising. Yet a comprehensive portrait of Africa's security landscape needs to include the full evolution in time, space and nature of political violence in the continent, including such unexpected and promising developments as the new peace deal recently signed by Ethiopia and Eritrea. Following the voluntary resignation of prime minister Hailemariam Desalegn, aimed at easing Ethiopia's domestic tensions, the country's new leader Abiy Ahmed Ali immediately reached out to the government in Asmara. He promised an unconditional handover of the disputed border town of Badme and paid a historic visit to the Eritrean capital, thus paving the way for the formal peace agreement signed in Jeddah (Saudi Arabia), in September 2018.

---

<sup>32</sup> M.-L. Flahaux and H. de Haas, "African migration: trends, patterns, drivers", *Comparative Migration Studies*, vol. 4, no. 1, 2016.

FIG. 5 - HOW AFRICANS LEAVE THEIR COUNTRIES  
(% TOTAL AFRICAN POPULATION)



Source: G. Carbone (Ed.), *Out of Africa. Why People Migrate* (2017)

**Patterns of political violence in Africa have varied over the decades.** Post-colonial Africa suffered relatively few interstate wars. Civil strife has often been the norm. The post-Cold War period saw the highest levels of fatalities from political violence in independent Africa, peaking in 1992-1994 when nearly 1/3 of the regional countries were involved in civil wars. Since the 1990s there has been a progressive stabilisation, sustained by peacekeeping missions and external interventions. At least until 2010, when, in a partial turnaround, incidents of political violence in Africa started increasing dramatically again, although fatalities have so far remained subdued compared to 1990s levels<sup>33</sup>. The region has also witnessed a change in the nature of violence, with the rise of jihadist movements and riots. The latter – violent forms of predominantly urban demonstrations – along with non-violent protests reached 36% of total political violence and protest events in 2016. Yet compared to conflicts

<sup>33</sup> Armed Conflict Location & Event Data Project (version 7) data.

proper, their scale of fatalities is overwhelmingly smaller and their drivers are frequently democratic causes. Finally, conflicts between farmers and herders have been a recurring plight in some African countries.

Over the long term, the geographical dimension of conflicts has also evolved, as instability is today mostly clustered in a T-shaped area across the core of the continent, which involves an arc ranging from West Africa to the Horn (Mali, Nigeria, South Sudan, Somalia) and the African Great Lakes region (DRC, CAR, Burundi).

Despite the numerous ongoing conflicts, military expenditure in sub-Saharan Africa decreased by 3.6% in 2015-2016 (US\$19.2 billion in 2016), but it is still 8.5% higher than in 2007<sup>34</sup>. This recent downward trend was steered by economic cuts in oil-producing countries, whereas in conflict-torn countries there has been a slight increase, albeit significantly lower than in previous years.

**The spread of violent extremism by terrorist and non-state groups** plays a substantial role in the recent increase in political violence. In Africa the number of terrorist events grew dramatically from 104 in 2004 to 3,418 in 2014. Such a twenty-fold increase brought a parallel surge in the number of victims (from 525 to 14,455), which subsequently contracted but stayed much higher than in previous decades (7,908 in 2016). The deadliest terrorist groups include Boko Haram in north-east Nigeria, the jihadists in the Sahel (AQIM and others), and the al-Shabaab in Somalia.

Deprivation, marginalisation and weak governance are reportedly the primary drivers or incentives of youth's journeys into violent extremism in Africa<sup>35</sup>. Better economic prospects and state capabilities might be the right answer to violent extremism. Yet African countries have mostly reacted to it by creating *ad hoc* military coalitions – such as the G5 Sahel Force in

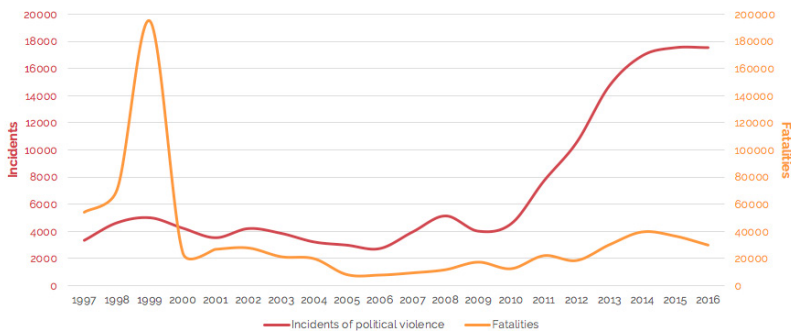
---

<sup>34</sup> Nan Tian *et al.*, *Trends in World Military Expenditure, 2016*, SIPRI Fact Sheet, April 2017.

<sup>35</sup> UNDP, *Journey to extremism in Africa*, 2017.

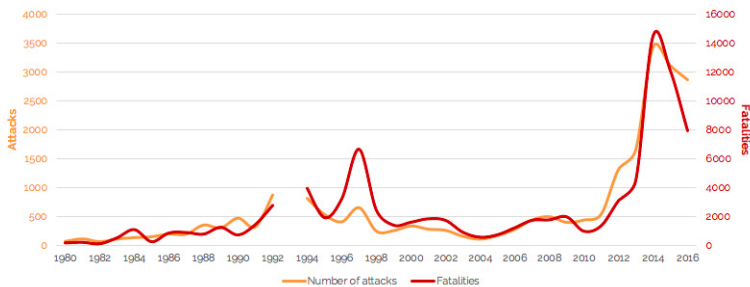
the Sahel and the Multinational Joint Task Force in the Lake Chad basin – whereas attention to the development dimension of security challenges still lags behind.

FIG. 6 - POLITICAL VIOLENCE IN AFRICA (1997-2016)



Source: ACLEDv7

FIG. 7 - TERRORISM IN AFRICA (1980-2016)



Source: Global Terrorism Database

## Environmental challenges

Africa is rich in natural resources, diverse ecological systems, varied agricultural production, but at the same time afflicted by land and resource degradation, high geographical exposure to natural disasters, limited productivity. Environmental changes, combined with pre-existing vulnerabilities, can magnify challenges and inequalities that may lead to political unrest or population movements.

**Africa faces numerous environmental challenges.** Natural resources are key assets for social development and economic growth, particularly for the agricultural sector, but are subject to climate-related threats, land degradation, mismanagement. All African regions, although in heterogeneous ways, are among those most adversely affected by climate change and other environmental stressors, because of high geographical exposure to natural disasters, demographic pressure, pre-existing vulnerabilities exacerbated by short-sighted development policies. The Sahel is the most affected region and has been dubbed “ground zero” for climate change<sup>36</sup>. Climate change projections show a cross-regional increase of temperatures in coming decades but a geographically varied impact on rainfall regimes across Africa. Intense rainfall and flash floods are expected to increase by 20% in West Africa in the next decade.

**Environmental disruptions weigh heavily on the economy and the employment sector**, considering that around 65% of Africa’s labour force is estimated to be involved in agricultural activities and their output accounts for around 32% of Africa’s GDP<sup>37</sup>.

**Significant progress has been made but there is much more untapped potential.** While agricultural output increased by 160% in the last three decades, Africa still has 60% of the world’s uncultivated arable land and remains a net importer of

---

<sup>36</sup> G. Carbone (2017).

<sup>37</sup> S. Whitfield, *Environmental and social sustainability in Africa*, Italy-Africa Ministerial Conference 2016, p. 4.

food<sup>38</sup>. Moreover, due to the expansion of agricultural production into low productivity land, Africa's land degradation has worsened and today affects 75% of the continent, whereas two-thirds of its lands are either desert or dry<sup>39</sup>. As a consequence, droughts and famine cyclically upset the region. Although malnutrition rates have declined from 28% in 1990-1992 to around 20% in 2014-2016, they are still the highest in the world<sup>40</sup>.

**Africa has taken up these challenges.** The African Union's 2063 Agenda draws on the 15th Sustainable Development Goal of the 2030 Agenda devoted to land degradation neutrality by voicing support for environment protection and climate resilience. In practical terms, these challenges are being countered by technological innovations in agriculture; more sustainable land and water management based on improved situational analysis and practices; investments in climate-smart strategies (techniques and tools that can bolster resilience in agricultural practices)<sup>41</sup>; and environmental adaptation strategies, including through migration. Indeed, far from being only a regrettable consequence of climate change, population movements have long been a strategy for adapting to rainfall's seasonality and periodic droughts.

## Towards regional integration

African nations entered the XXI century by re-stating their strong commitment to the creation of economic and political integration on the continent. Progress has been uneven, with some Regional Economic Communities leading the way and others struggling to integrate member countries.

---

<sup>38</sup> W. Plaizier *2 truths about Africa's agriculture*, World Economic Forum, 22 January 2016.

<sup>39</sup> UNCCD, *Regional implementation annex for Africa*.

<sup>40</sup> FAO, *The State of Food Insecurity in the World*, 2015, p. 8; "2018 World Hunger and Poverty Facts and Statistics", Hunger Notes.

<sup>41</sup> S. Whitfield (2016), p. 7.

**Africans share a common vision and strategies for the economic and political integration of the continent.** The African Union (AU), established in 2000, most recently articulated its vision with “Agenda 2063” (2015), setting out transformation strategies that aim at making progress towards a united, inclusive, peaceful, prosperous and sustainable Africa over the next 50 years. Real progress, however, has been uneven. AU institutions remain in their infancy and political unity is mainly a faraway horizon. Important steps are being made in terms of economic integration. Intra-African trade is on the rise and expected to reach US\$180 billion in 2017. The historic launch of the African Continental Free Trade Area (AfCFTA), in March 2018, is meant to further boost intra-regional integration and trade. Yet, at just about 19% of the continent’s \$930 billion total trade<sup>42</sup>, it remains much lower – for example – than intra-EU trade in goods (63% of all trade in goods by EU countries in 2015)<sup>43</sup>.

**Strengthening the building blocks: Regional Economic Communities (RECs).** Sub-regional integration via officially recognised RECs is not only the foundation of Africa’s roadmap towards continental integration – as foreseen by the 1994 Abuja Treaty – but also a strategy for expanding, diversifying and strengthening economies that are too fragmented, often small in size, and in many a case landlocked. The RECs roadmap envisages the elimination of internal tariff and non-tariff barriers, the creation of Free Trade Areas and Customs Unions, the establishment of an African Common Market with free movement of people, capital and goods, and the final goal of Pan-African Economic and Monetary Unity.

**Individual RECs are making very uneven progress<sup>44</sup>.** The East African Community (EAC) is leading the way, but significant steps forward have also been made by the Economic

---

<sup>42</sup> *FDI Spotlight*, [fdispotlight.com](http://fdispotlight.com), 2017.

<sup>43</sup> Eurostat, *Intra-EU trade in goods - recent trends*, January 2017.

<sup>44</sup> UNECA, AUC, AfDB, *Africa Regional Integration Index Report 2016*, Addis Ababa, 2016.

Community of West African States (ECOWAS), the Southern African Development Community (SADC), and the Common Market for Eastern and Southern Africa (COMESA). COMESA, EAC, and SADC also launched a Free Trade Area project that will comprise 26 states, a combined 625m population and a GDP in excess of US\$1 trillion<sup>45</sup>. Other RECs – the Economic Community of Central African States (ECCAS), the Community of Sahel-Saharan States (CEN-SAD), the Intergovernmental Authority on Development (IGAD) and the Arab Maghreb Union (AMU) – are lagging behind. Differences are found inside individual RECs too, with some member states more clearly committed to implementing integration measures than others.

**Economic corridors are gaining pace as a platform for co-operating on shared problems.** Corridors help establish a platform through which different African countries come together to address common infrastructure, transport and logistic challenges. Early experiences include the Northern Corridor (from Bujumbura, in Burundi, to Mombasa in Kenya), established in 1986, but the continent is today criss-crossed by at least two dozen corridor initiatives, including the North-South corridor (linking the port of Durban in South Africa to the Copperbelt in Zambia and the DRC) or the Dakar-Abidjan-Lagos corridor project. Individual states retain responsibility for implementing measures linked to the development of a corridor, implying important capacity gaps. Yet corridors are a crucial opportunity for regional integration, particularly for landlocked Africa, i.e. 16 countries comprising a population of over 200 million and distances to ports of 1,000 to 1,500 km<sup>46</sup>.

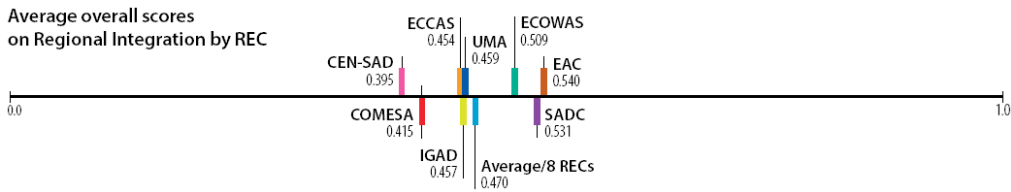
---

<sup>45</sup> *FDI Spotlight*,...cit.

<sup>46</sup> UNECA, AU, AfDB, *Harmonizing Policies to transform the Trading Environment*, Assessing Regional Integration in Africa VI, 2013.



FIG. 8 - THE REGIONAL INTEGRATION INDEX 2016



Source: UNECA, AUC, AfDB.

## Foreign powers and Africa

Africa's ongoing transformations have been both the cause and the consequence of growing international interest in the continent. The China-in-Africa story is only the best-known part of recent external involvement in the area. Advanced economies (France, the US, Germany and many others) as well as emerging economies (India, Russia, Turkey and the like) have competed to expand their political and economic footholds in Africa.

**Drivers of foreign involvement (I): economic opportunities.** The expansion of international trade and foreign direct investments in Africa testifies to key economic motives behind foreign linkages with the region. African countries mostly export natural resources, with a strong role for energy and mineral products that are highly valued by advanced and emerging economies, particularly China. But the image of one-way trade through which rich and emerging countries drain Africa's resources is incomplete. African imports are an important part of the picture, with emerging and frontier markets on the continent increasingly attractive for governments and businesses from the global North as well as from Asia.

**Drivers of foreign involvement (II): geopolitical interests.** European and American concerns with combating international terrorism and managing migration processes strongly

contributed to a resurgence of Western interest in Africa. The stabilisation of crises or ungoverned areas and, in particular, the control of national borders and migration flows is driving much of the EU's foreign policy towards Africa, including the EU Emergency Trust Fund for Africa and the EU External Investment Plan. But other players also show a keen geopolitical interest in the region. China, for example, regularly takes part in UN peacekeeping missions and recently opened its first ever overseas military basis in Djibouti; the United States over the past decade established a new military command entirely devoted to Africa and adopted its first "*US Strategy toward sub-Saharan Africa*"; Turkey had then prime minister Recep Tayyip Erdoğan visit war-torn Somalia in 2011, the first head of government to do so in more than two decades.

#### **The new toolkit for strengthening relations with Africa.**

Traditional tools have been employed to build and nurture close relationships with African partners. From raising development aid levels to the multiplication of diplomatic missions or that of airline destinations. But new strategies have also rapidly gained use. Several countries, in particular, followed the example of France and China in hosting large conferences in which to dialogue with African countries. Japan gathered 35 African heads of government and state in Nairobi for the 6th Tokyo International Conference on African Development, in 2016. The previous year, China itself disproved all ideas that it was taking a step back by pledging US\$60 billion over three years for the continent at the Forum on China-Africa Cooperation, in Johannesburg. In the decade prior to 2017, Brazil, South Korea, France, India, Turkey, the Arab states, the United States, and Italy also held similar meetings or summits.