

# Global Africa

Africa in the World  
and the World in Africa



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# Chapter

01.

Africa in the world: vast potential and key assets, with hurdles to overcome



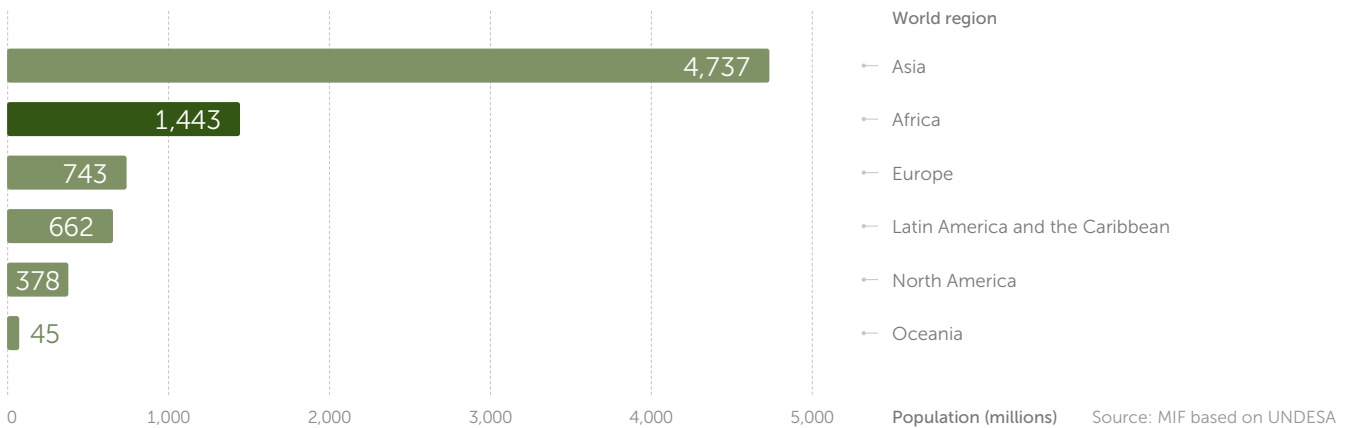
**The world's population is heading towards an African majority**

**Africa already represents almost 20% of the world's population**

- In 2023, Africa is the second most populous world region, making up almost 20% of the world's population with 1.4 billion people.
- It currently sits far behind Asia (4.7 billion).
- Africa's population is already twice that of Europe's (743 million).

Africa's population is already twice that of Europe's

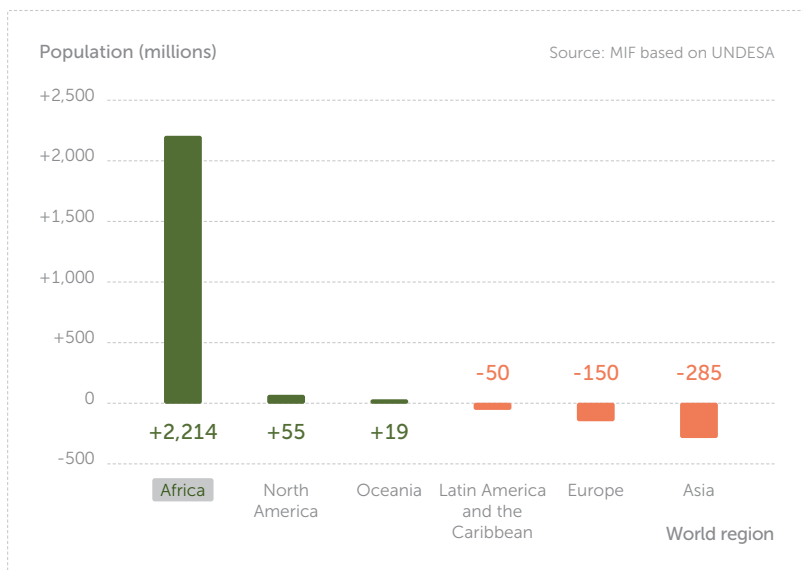
World regions: total population (2023)



**Africa's population will be the only one to grow significantly from 2060**

While Asia will remain the world's most populous region in 2100, it will begin to decrease from 2060. North America and Oceania will also continue to grow but Africa's population is estimated to be the only one to grow significantly.

World regions: population change (2030-2100)



Global population growth between 2030 and 2100 will be mainly led by Africa.

- Africa's population will increase by 2.2 billion people (23% more than the growth at a global level).
- North America will increase by 55 million people (only 2.5% of Africa's growth).
- Oceania will increase by 19 million people (only 0.9% of Africa's growth).

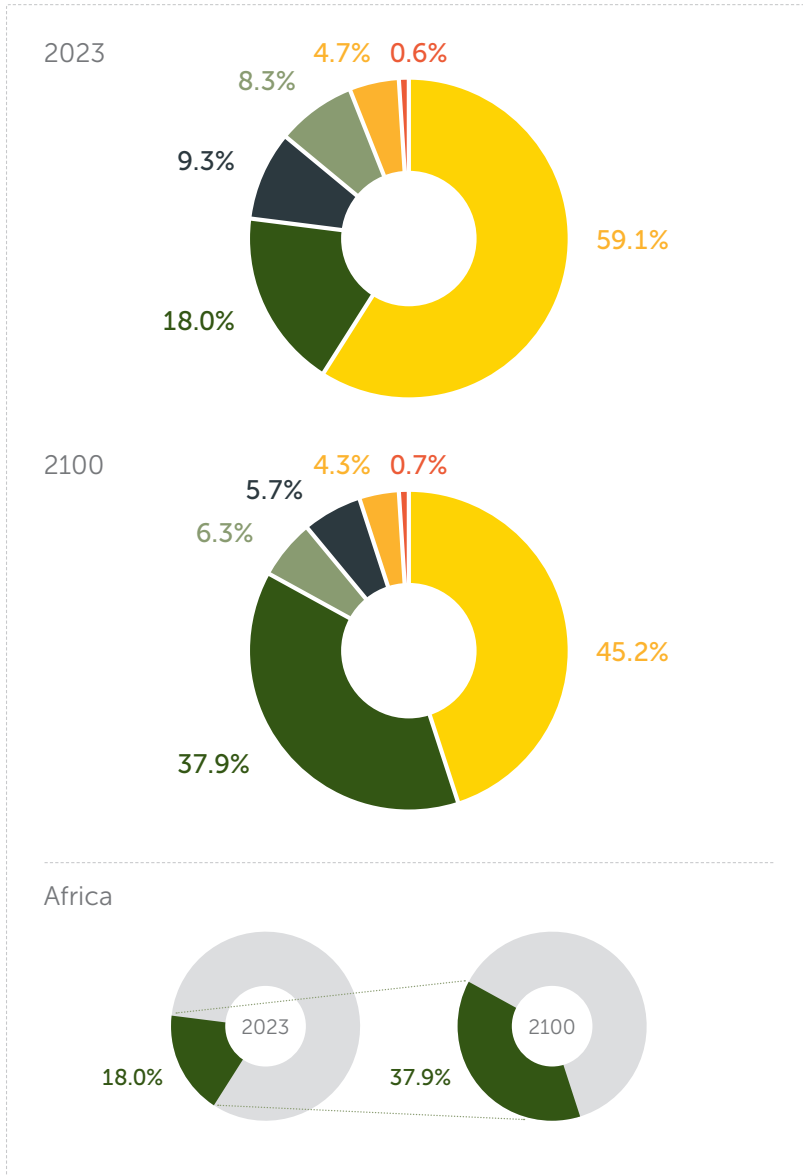
Across the rest of the world, the population will decrease.

- Asia will decline by 285 million people.
- Europe will decline by 150 million people.
- Latin America and the Caribbean will decline by 50 million people.



Africa is set to make up over one third of the world's population by 2100 (37.9%), a sharp increase from 2023 (18.0%). Meanwhile, Europe's share will decrease from 9.3% to 5.7% and North America's from 4.7% to 4.3%.

World regions: total share of world population (2023 & 2100)



Between 2023 and 2100, Africa's share of the world population will grow from 18% to 38%

Between 2030 and 2100, Africa's population will increase by +2.2 billion and will be the main driver of global population growth

- World region
- Africa
  - Asia
  - Europe
  - Latin America and the Caribbean
  - North America
  - Oceania

Source: MIF based on UNDESA

### Africa is already by far the youngest continent

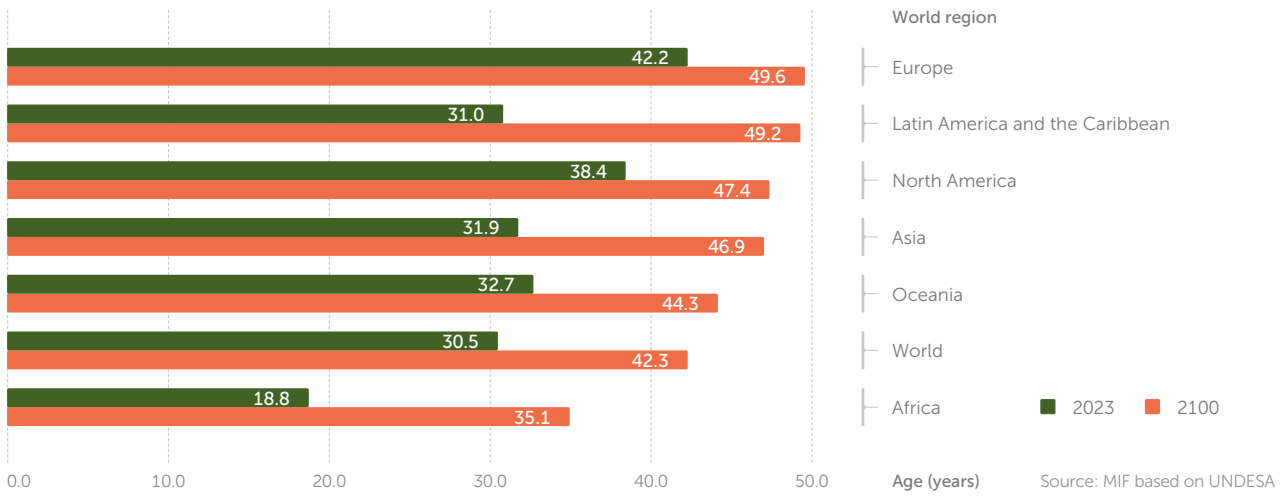
#### By 2100, Africa's youth will represent almost half of the world's youth

At 18.8, Africa's median age is by far the youngest in the world, 12.2 years younger than Latin America and the Caribbean, the region with the second lowest median age.

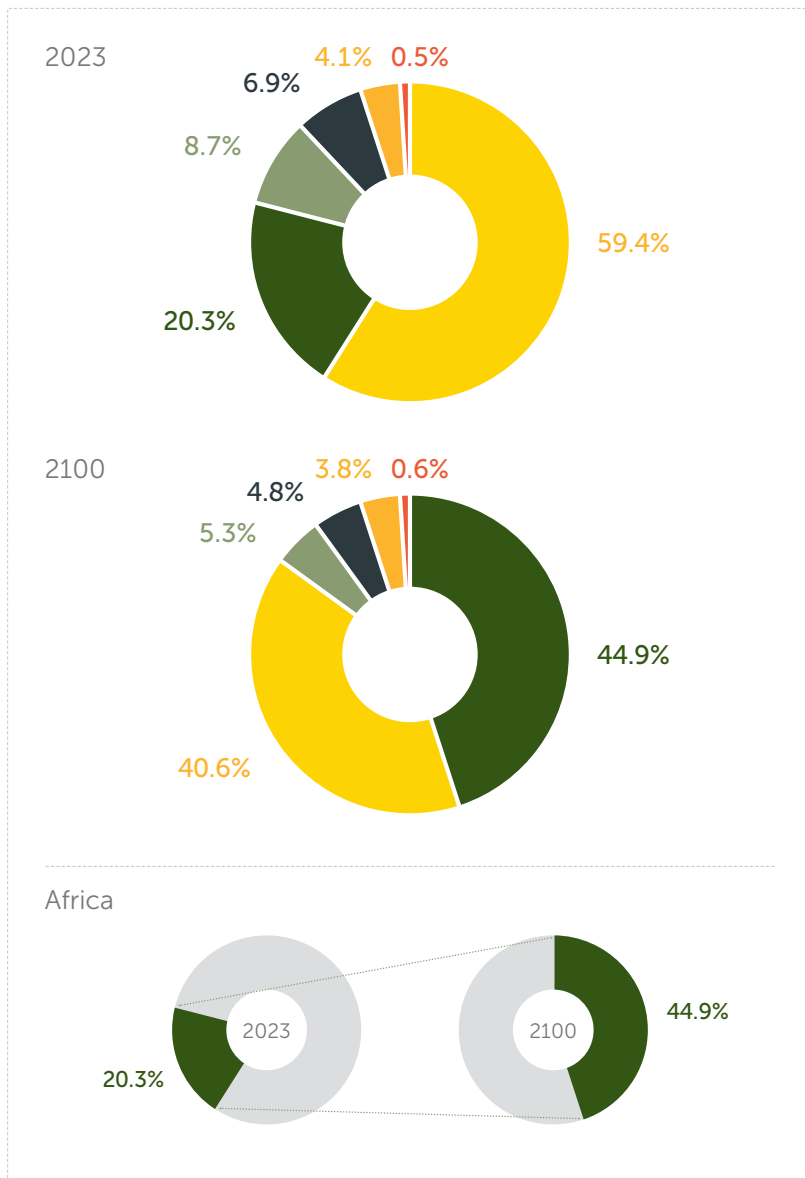
This will remain the case in 2100, when Africa's median age is set to reach 35 years, against 44-50 in other world regions.

Africa currently is the region with the second largest share of youth in the world (20.3%), surpassed only by Asia (59.4%).

World regions: median age (2023 & 2100)



World regions: share of youth population (2023 & 2100)



Africa's share of the global youth population will more than double from 20% in 2023 to 45% in 2100

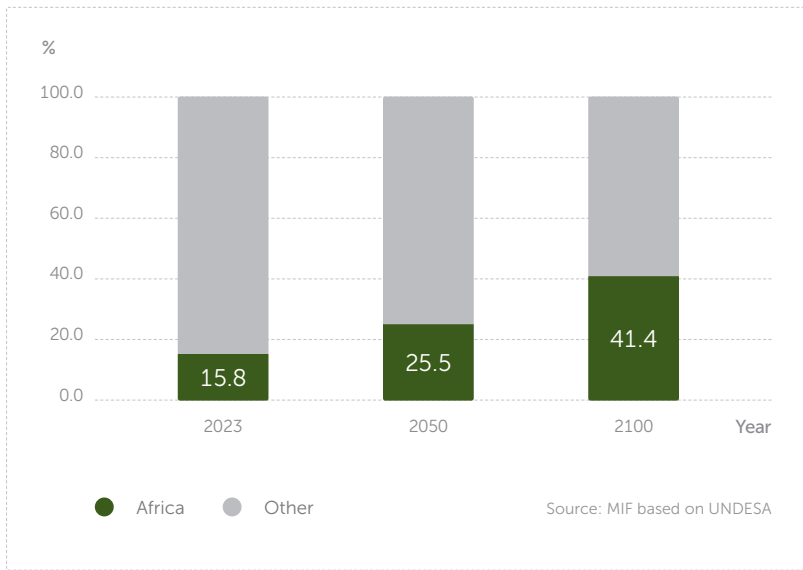
By 2085, Africa will overtake Asia as the region with the most youth globally

**Africa's youth: tomorrow's potential global workforce**

Africa currently accounts for over 15% of the global workforce, far behind Asia (60.8%). But with over 20% of the world's youth population, Africa's share of the global work force is only going to increase.

**By 2050 Africa will account for one quarter of the global labour force and over 40% by 2100**

Africa: share of global working age population (2023-2100)



**Asia's share of global youth will shrink by almost 20% between 2023 and 2100**



**Africa's share of the global working age population will almost triple between 2023 and 2100**

**A window of opportunity: Africa's declining dependency ratio**

Africa's dependency ratio has been declining steadily in recent years.

In 2020, Africa was the region with the highest total dependency ratio. However, 88% of the support burden came from children. In Europe, the dependency ratio is largely due to older people.

By 2055 Europe will have the largest dependency ratio, with 78.2 dependants per 100 working age people.

Meanwhile, Africa will have the lightest dependency ratio, with 58.9 dependants per 100 working age people.



**By 2055, Africa will have the lowest dependency ratio globally, amounting to 3/4 of Europe's**

## A key hurdle: education and training not keeping up with the task

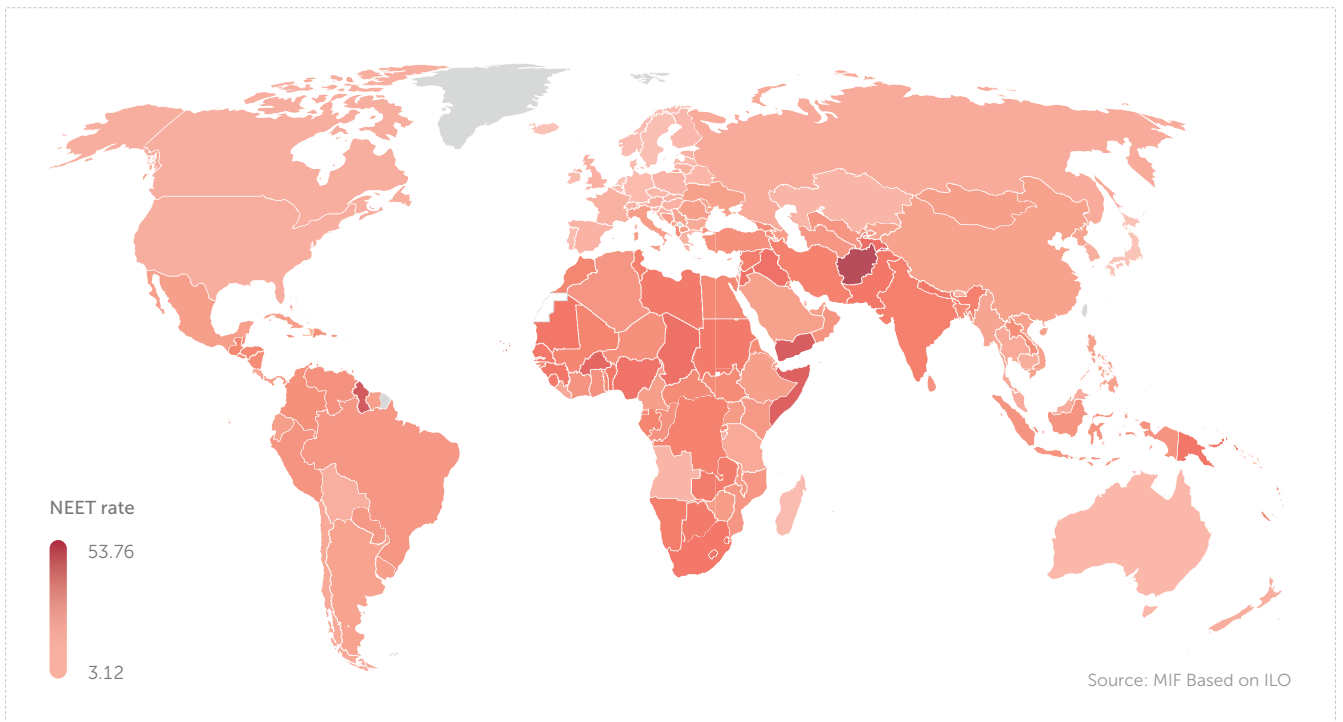
While Africa has the youngest population in the world, the continent's level of education and training lies far below the global average.

While globally Afghanistan has the highest share of youth not in employment, education or training (NEET), at 43.9%, Somalia has the highest share of NEET youth in Africa.

Angola and Madagascar are the only African countries whose share of NEET youth stands below 10%.

26.1 % of Africa's youth is non-employed, non-educated, non-trained (NEET)

### World regions: share of youth aged 15-24 not in employment, education or training (NEET) (2022)



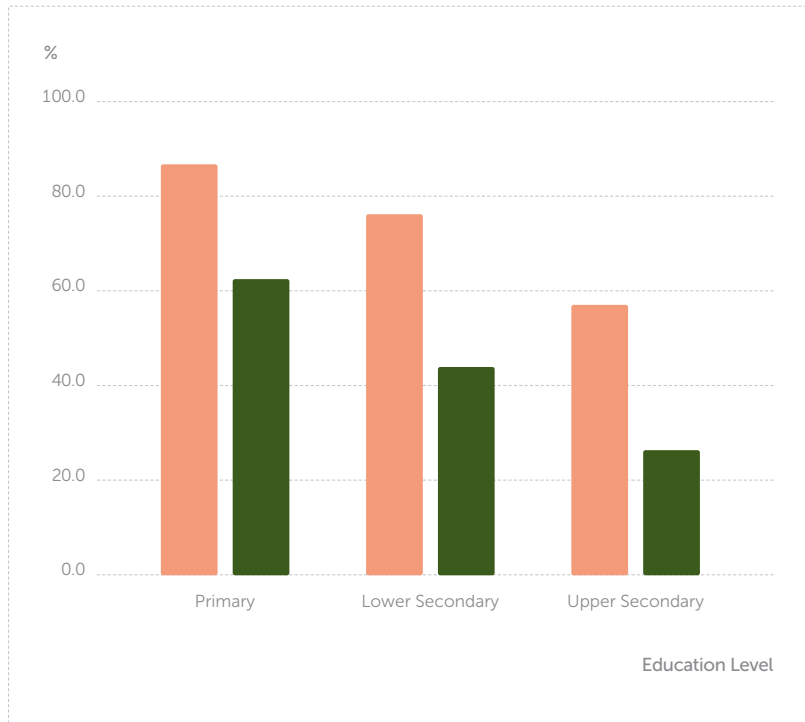
As percentage of GDP between 2011 and 2020, the gap between the highest and lowest spending African countries on education has shrunk by barely 1%.

Africa has the lowest education spending per capita globally, meaning that investment in education is not matching demographic trends on the continent. Furthermore, along with Latin America and the Caribbean, it is one of only two world regions for which spending per capita has actually decreased over the time period.

Somalia (43.9%) has the highest share of NEET youth in Africa

Angola and Madagascar are the only African countries whose share of NEET youth stands below 10%

World & sub-Saharan Africa: education completion rate by level (2019)



World  
Sub-Saharan Africa

Source: MIF based on UNESCO

Expected years of schooling in Africa are the lowest globally

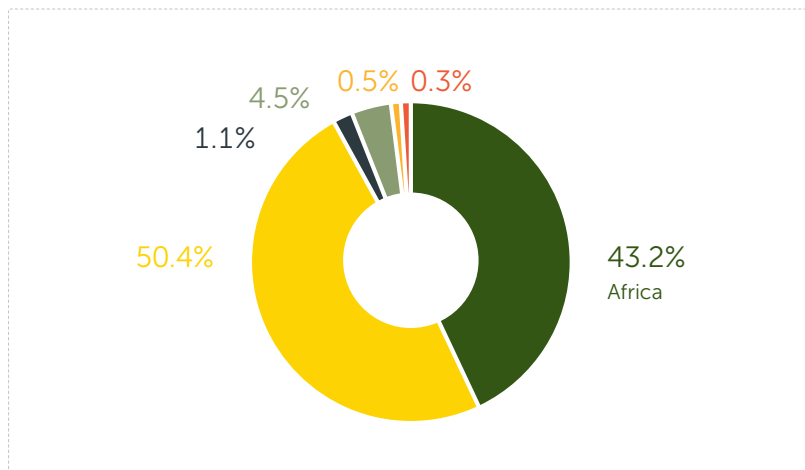
According to the latest available figures in Africa (2010-2020):

- At primary level, completion rates are of 62.5% in sub-Saharan Africa compared to 86.4% in the world.
- At lower secondary level, completion rates are of 43.8% in sub-Saharan Africa compared to 75.9% in the world.
- At upper secondary level, completion rates are of 26.3% in sub-Saharan Africa compared to 56.8% in the world.

43.2% of the world's out-of-school children and youth live in Africa

103.6 million children and youth are out of school in Africa

World regions: share of out-of-school children and youth (2020)



World region  
Africa  
Asia  
Europe  
Latin America and the Caribbean  
North America  
Oceania

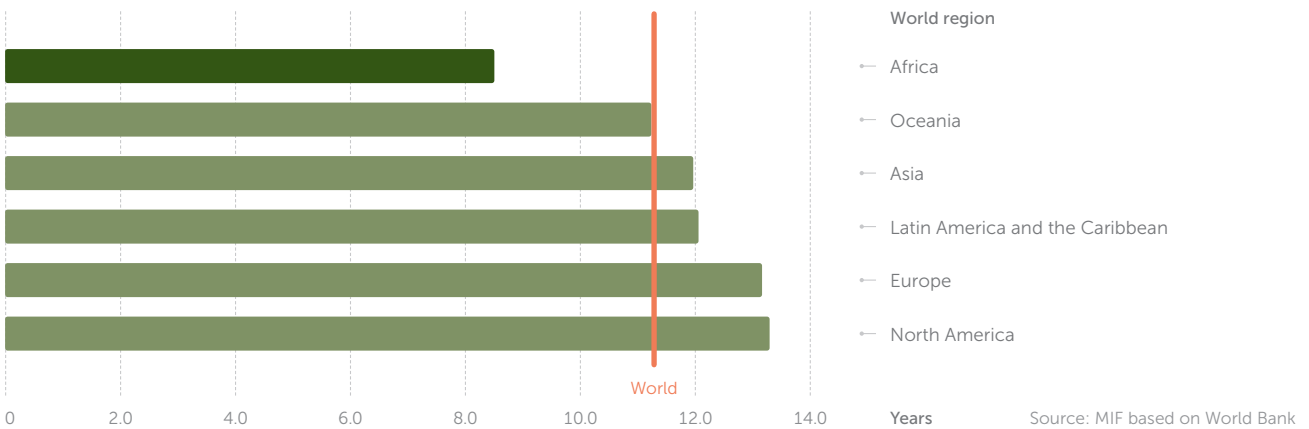
Source: MIF based on UNESCO

- At primary level, the average out-of-school rates are of 20.5% in sub-Saharan Africa compared to 9.4% globally.
- At lower secondary level, the average out-of-school rates are of 34.0% in sub-Saharan Africa compared to 14.4% globally.
- At upper secondary level, out-of-school rates are of 47.5% in sub-Saharan Africa compared to 30.9% globally.

According to the latest available data year (2020), the expected years of schooling in Africa are the lowest out of all world regions (8.5 years), far below Oceania (11.4 years), the second lowest region.

Expected years of schooling in Africa are the lowest out of all world regions: (8.5 years), far below Oceania (11.4 years)

World regions: expected years of schooling (2020)



**A challenging skills mismatch**

According to the United Nations International Children’s Emergency Fund (UNESCO), countries in sub-Saharan Africa are severely affected by qualifications and skills mismatches, making it hard for employers to find suitable job applicants.

Most countries experience vertical mismatches where workers do not have the necessary level of education to perform the tasks in their chosen careers. In most cases, graduates do not have the skills required by particular professions.

Most countries also suffer from horizontal mismatches, whereby workers’ occupations are unrelated to their fields of study.

Another limitation lies in the fact that specialisation occurs at tertiary education, a level attained by only a minority of students in sub-Saharan Africa where just 5% of adults have a degree.

1/2 of African youth aged between 18 and 24, are considering emigrating if their governments don't take action to improve the quality of their lives

## SPOTLIGHT

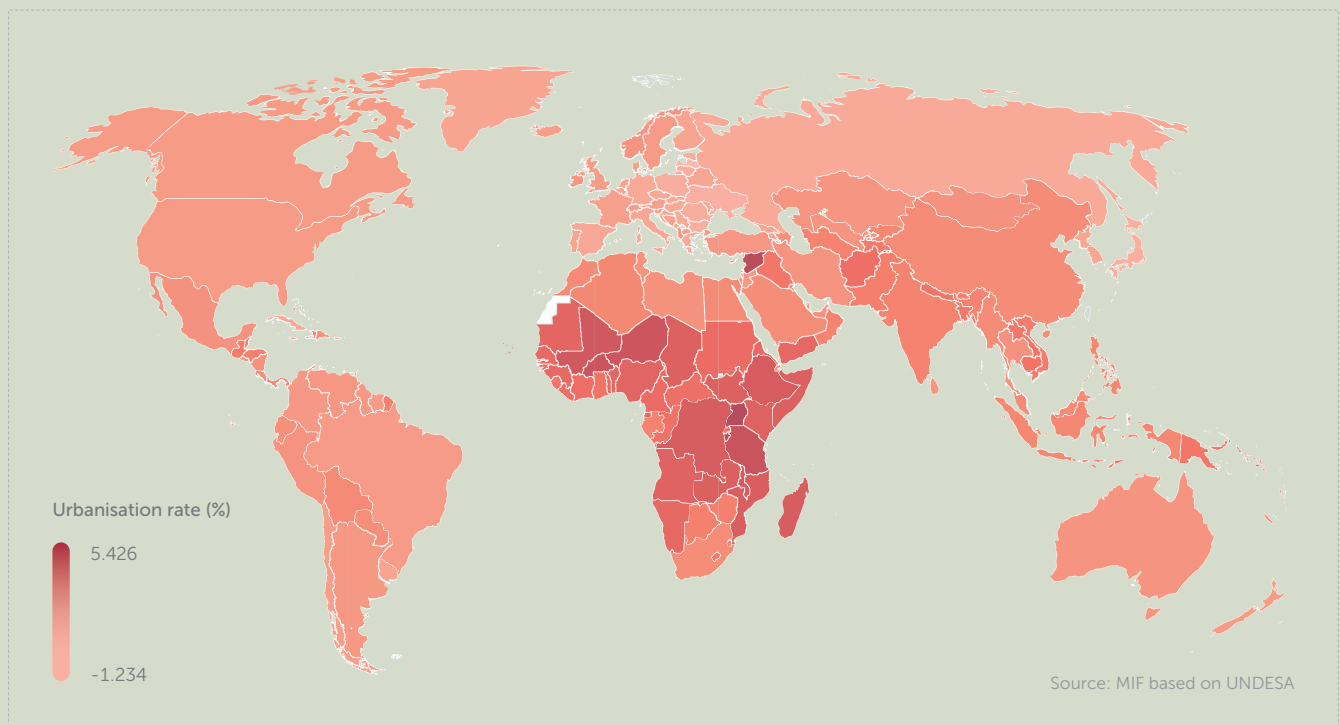
### The urbanisation boom: no other world region urbanising faster than Africa

**No part of the planet is urbanising faster than Africa, not even historically**

It took Europe 110 years to move from 15% of the population living in urban areas in 1800 to 40% by 1910.

Africa has achieved this in only 60 years (1950-2010) – almost half the time.

#### World regions: annual average urbanisation rate (2020-2025)



**Cairo is the only African city among the ten most populous cities in the world**

#### Africa has only three megacities: Cairo in Egypt, Kinshasa in DR Congo and Lagos in Nigeria

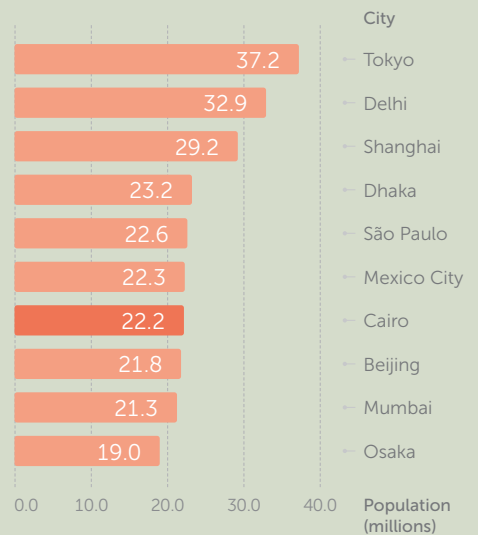
In Africa, there are more than 1,400 intermediary cities which are home to 210 million people.

Africa has 6,740 small urban agglomerations with fewer than 100,000 inhabitants which are home to 180 million.

The number of agglomerations hosting between 10,000 and 100,000 people has grown from 4,770 in 2000 to 6,740 in 2015.

While existing cities are set to grow, a key feature of the urbanisation dynamic in Africa is that many new cities will form.

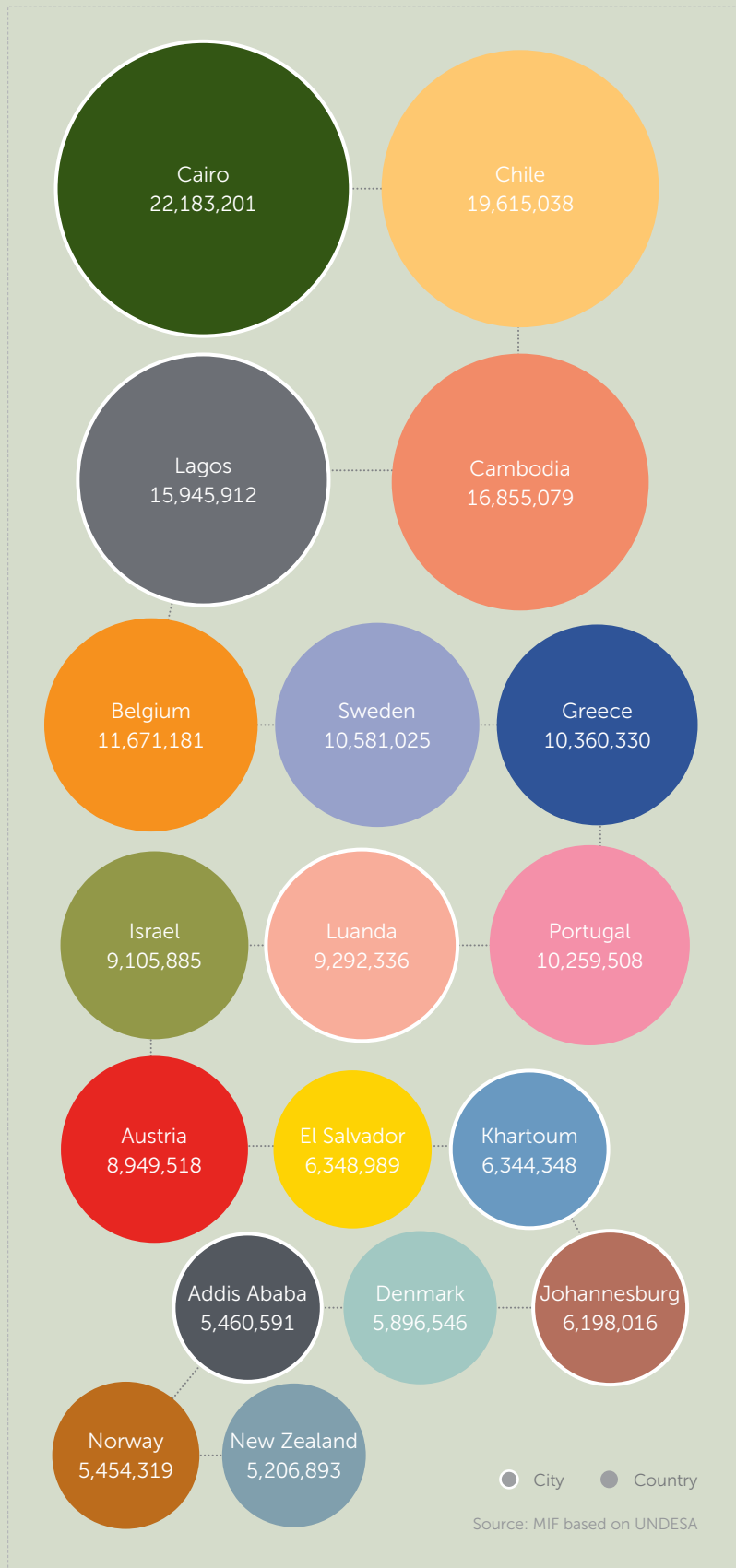
#### World: ten most populous cities (2023)



Source: MIF based on UNDESA

## African cities larger than whole countries

Total population: selected African cities & global countries (2023)



### The fastest growing cities in Africa are intermediary cities

In Africa, the fastest growing cities have fewer than 1 million residents. Of the 20 fastest growing cities globally between 2000 – 2020, six of them are in Africa and none of them are megacities.

Six out of the 20 fastest growing cities in the period 2000-2020 are African including Gwagwalada (Nigeria), Kabinda (DR Congo), Mbouda (Cameroon), Lokoja (Nigeria), Uige (Angola) and Ruiru (Kenya).

**35** countries have improved in the IAG Affordable Housing indicator between 2012 and 2021

### The main challenge of Africa's urbanisation: informality and unplanned cities

- 90% of the new urban development in Africa is currently informal.
- Roughly two thirds of the investments in urban infrastructure needed by 2050 have yet to be made.



## AFRICA'S ECONOMY: STILL PUNCHING BELOW ITS WEIGHT

### Africa currently accounts for only 3% of global GDP versus 18% of the world's population

Despite accounting for 18% of the global population and 15% of the global workforce, Africa only accounts for 3% of the world's economic activity.

### Africa's total GDP is smaller than that of the UK, Germany or Japan

Selected regions & countries: GDP and population (2023)



### North America's GDP per capita is 20 times larger than Africa's

At a per capita level, the contrast is even more stark. Africa's GDP per capita is 20 times smaller than North America's, over ten times smaller than Europe's, and less than one third of Asia's or Latin America's.

### Africa will become the world's fastest growing region by 2027

According to the International Monetary Fund (IMF), Africa's growth rate should outstrip the global average in each of the next five years, being second only to Asia.

In 2023, Africa's growth rate will be more than eight times higher than Europe's and three times higher than North America's.

Africa's total cumulative GDP is less than 10% of Asia's GDP

By 2027, Africa is projected to become the fastest growing region globally, outpacing Asia

**Six out of the ten fastest growing economies in 2023 are African countries**

**African countries: fastest projected GDP growth (2023)**

Rank Africa	Rank Global	Country	GDP growth (%)
1	3	Libya	17.9
2	5	Senegal	8.1
3	6	Niger	7.3
4	8	DR Congo	6.7
4	8	Rwanda	6.7
6	10	Côte d'Ivoire	6.5
7	12	Benin	6.2
8	13	Togo	6.2
9	18	Gambia	6.0
10	21	Uganda	5.9

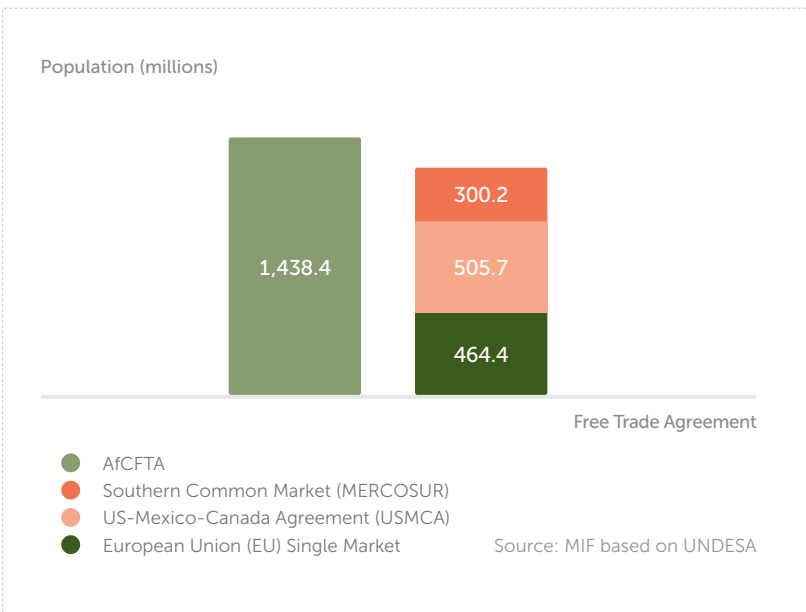
Source: MIF based on IMF

**Africa accounts for 70% of the World's Mobile Money Market:**  
 The world's mobile money market reached \$1 trillion in 2021, with the value of Africa's mobile money transactions reaching \$701.4 billion.

**Born in 2021, AfCFTA is the world's largest potential market**

In January 2021, the African Continental Free Trade Area (AfCFTA) was launched, creating a unified market of over 1.4 billion consumers.

**Selected Free Trade Agreements: total population covered (2023)**



Egypt is planning to increase its exports within the continent to \$15 billion in the coming years

A market of more than 1.4 billion people, the AfCFTA surpasses the EU single market, USMCA and MERCOSUR combined

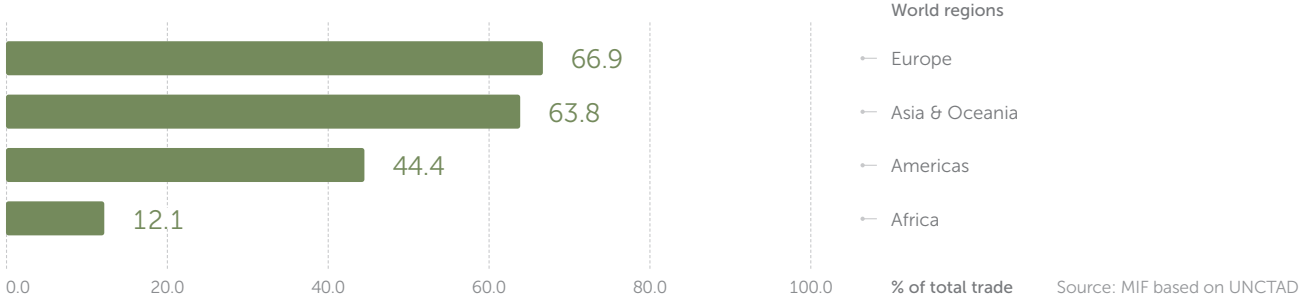
The AfCFTA is the largest free trade agreement in the world in country terms (54)

Despite the launch of the AfCFTA, intra-continental trade is the lowest of any world region - constituting less than 13% of Africa's total trade, in comparison to 66.9% in Europe, 63.8% in Asia, and 44.4% in the Americas.

Africa still has the lowest intra-regional trade of any world region.

**Intra-continental trade remains the lowest of any world region**

World regions: intra-regional trade (2021)



**Key hurdles: transport and energy**

**Transport: limited road, rail and air networks are a hindrance to trade**

Africa faces a major infrastructure deficit, with transport networks that do not reflect its population or landmass.

Without the relevant infrastructure to facilitate movement within the continent, intra-regional trade will continue to be costly and inaccessible, regardless of tariff reductions.

The road network in the US is over twice as long as Africa's - despite the US being 1/3 of the size of Africa and having 1/5 of its population

**Africa has over one fifth of the world's land area but less than 8% of the world's road and rail**

Selected countries & regions: global share (latest data year)

Country	Road Network	Rail Network	Air Traffic	Surface Area	Population
Africa	7.4%	6.9%	2.2%	22.8%	18.0%
China	13.0%	11.7%	14.5%	7.4%	17.8%
EU	14.4%	15.9%	17.6%	3.2%	5.6%
US	16.4%	22.9%	20.3%	7.6%	4.2%

Source: MIF based on CIA World Factbook, UNDESA, UNSD & World Bank

### Energy: 600 million in Africa still with no access to electricity

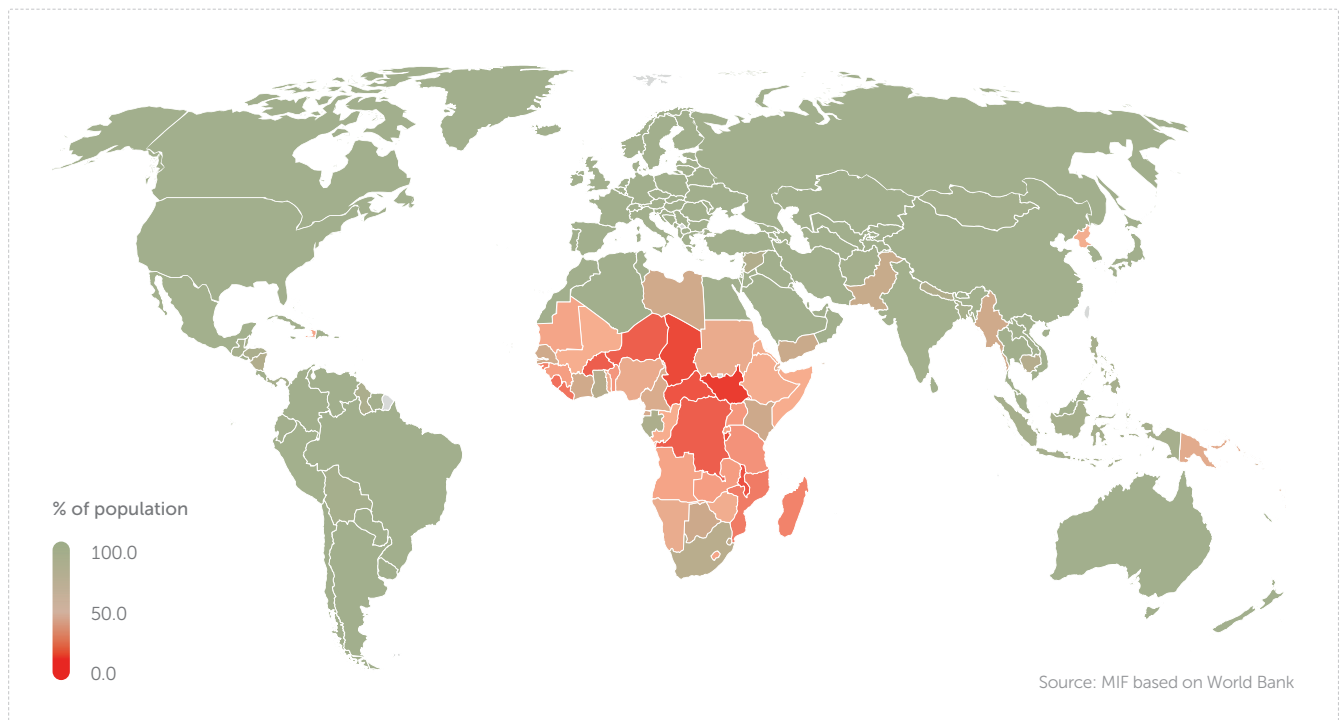
Energy is a pre-requisite for economic development. But just over half (55.9%) of Africa's population has access to electricity, as opposed to over 90% for the rest of the world.

While 51 African countries have improved in the IIAG Access to Energy indicator between 2012 and 2021, progress for most countries has started from a low base.

4 out of every 5 people without electricity globally live in Africa

Roughly 600 million people in Africa have no access to electricity, more than the combined population of France, Japan, the US and the UK

### World countries: access to electricity (2020)



Over 950 million in Africa lack access to clean cooking fuels. This is all the more worrying as it is also the only region in which the use of these fuels is rising.

In 2019, Japan alone consumed more electricity than all African countries combined, with a population less than 1/10 of the size

# AFRICA'S NATURAL RESOURCES: VITAL FOR A GLOBAL GREEN TRANSITION

## Africa is home to key assets for the global green economy

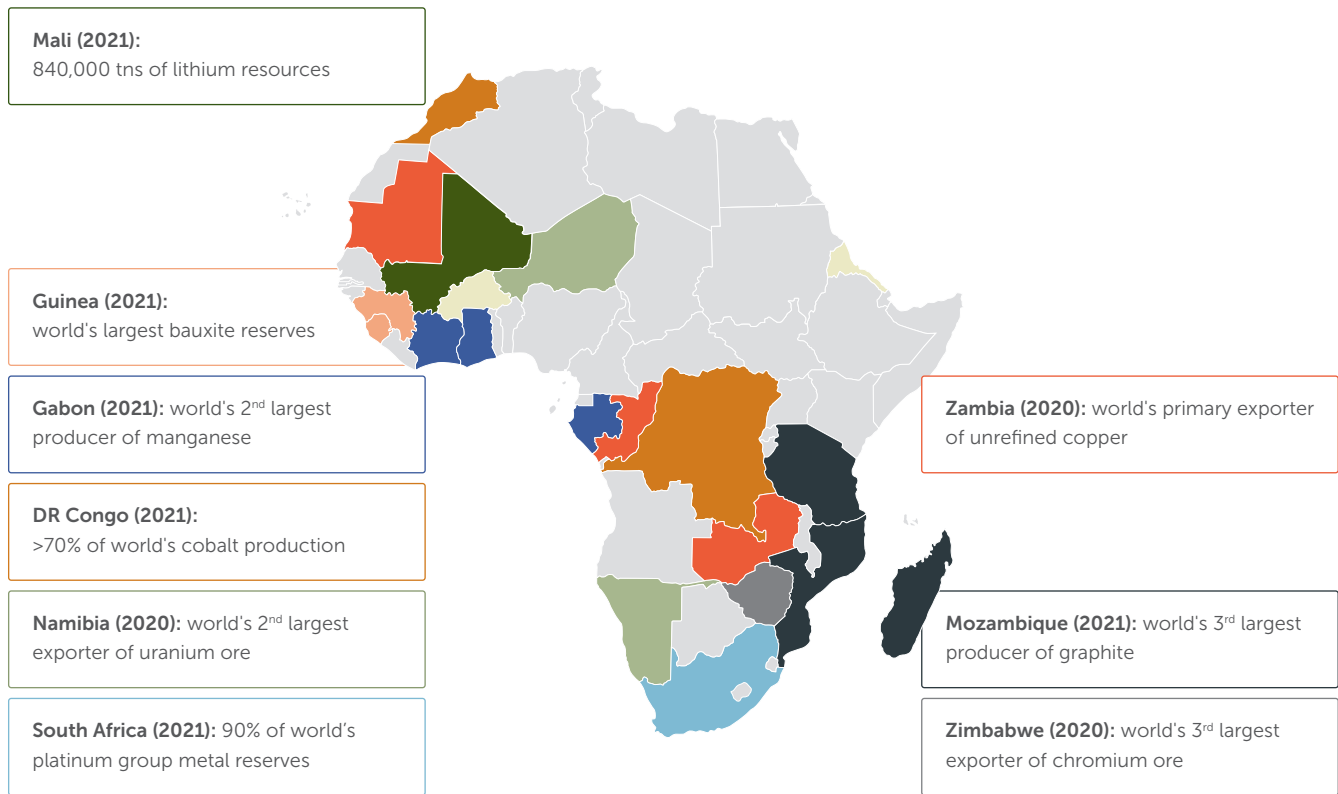
### Africa's mineral wealth

Africa holds 30% of the world's mineral reserves, many of which are critical to renewable and low-carbon technologies including solar, electric vehicles, battery storage, green hydrogen and geothermal. According to the World Bank, in order to meet the expected rise in global demand, production of minerals and metals such as lithium, graphite and cobalt will need to increase by nearly 500% by 2050. This cannot be achieved without Africa's resources.

Africa accounts for over 70% of global cobalt production, and 90% of the world's platinum group metal reserves, both critical to green technologies.

In 2021, four African countries - Botswana, DR Congo, South Africa and Zimbabwe - account for 46% of the global production of industrial diamonds.

### African countries: selected low carbon minerals (2020-2021)



**Who holds the keys to a global green economy?**

70% of the world's cobalt is extracted from the DR Congo. Most of it is exported to China, who produces 70% of the world's electric batteries.

Source: MIF based on Atlas of Economic Complexity, United States Geological Survey & World Nuclear Association

### Green hydrogen: Africa's potential

Green hydrogen technology has been touted as a replacement for fossil fuels in hard-to-abate carbon-intensive sectors such as cement, steel, fertilisers, plastics and transport. Africa is expected to be a preferred location for the green hydrogen economy due to its greater land availability, easy access to water sources and port facilities. Many African countries are already seeking to tap this potential:

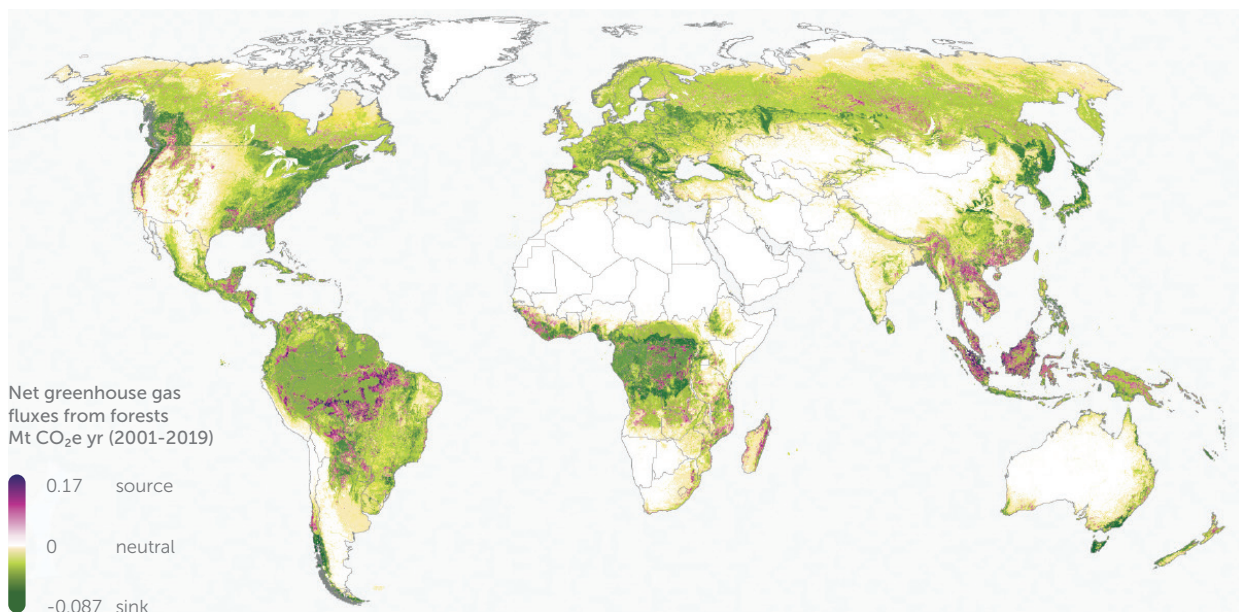
- Namibia is aiming to produce 300,000 tonnes of green hydrogen per year by 2026.
- Mauritania signed two large-scale green hydrogen projects in 2022 with 40 gigawatts of capacity, enough to power the whole country for over a month.

 Guinea holds the world's largest reserves of bauxite

### Africa sinks more carbon than it emits by far

- Carbon cost of economic growth in Africa lies far below the rest of the world.
- The average carbon cost of growth in Africa was 0.2 in 2019.
- This compares favourably with the global average, which stood at 0.45 in 2019.
- The carbon cost of growth is negative for 14 African countries: Botswana, Zambia, Cameroon, São Tomé and Príncipe, Gabon, Central African Republic, Chad, Mauritius, Eswatini, DR Congo, Madagascar, Egypt, Senegal and Niger.

### Forests: carbon sinks or carbon sources?



Source: Harris et al. 2021

Despite being the world's second largest rainforest after the Amazon, the Congo Basin forests of Central Africa are now the world's primary tropical carbon sink, absorbing more carbon than the Amazon and Southeast Asia combined.

They are estimated to already contain between 25-30 billion tonnes of carbon – roughly equal to four years of current global anthropogenic carbon dioxide emissions.

They absorb an estimated 1.1 billion to 1.5 billion tonnes of carbon dioxide annually – approximately 4% of global carbon emissions, offsetting more than what is emitted by the entire African continent annually.



**Now the world's primary tropical carbon sink, the Congo Basin forest absorbs 4% of global carbon emissions annually, and offsets more than the whole continent's emissions**

#### **Per capita greenhouse gas (GHG) emissions (2019)**

The average per capita GHG emissions in African countries is 4.2 tonnes, only 55% of the global average at 7.7 tonnes.

Of the 51 African countries analysed, the majority fall far below the African and global per capita GHG emission averages.

- 35 countries had per capita GHG emissions lower than the African average, and 40 had values below the global average.
- Ghana had the lowest per capita GHG emissions in Africa, higher only than the island nation of Fiji at global level.
- Only 10 African countries exceeded the global GHG average, Botswana being the highest at almost three times the global average.

#### **The Africa Carbon Markets Initiative (ACMI)**

With the Paris Agreement process setting increasingly stringent goals to reduce global greenhouse gas emissions, it has become critical for governments and non-state actors to focus on direct decarbonisation. To complement these efforts, voluntary carbon markets (VCMs) are playing a more significant role, particularly for the private sector, with the potential for VCM expansion to deliver on broader development goals by channelling investment to credible carbon mitigation projects with high social and environmental co-benefits.

ACMI was launched at COP27 in November 2022 and aims to build the foundations for a VCM ecosystem in Africa by 2030.



**It is estimated that Africa currently generates only 2% of its annual carbon credit potential**

Meeting at the Abu Dhabi Sustainability Week, the steering committee announced 13 action programmes intended to produce 1.5 billion credits annually in Africa, unlocking over \$120 billion and supporting over 110 million jobs by 2050.

Demand for African-origin carbon credits has been growing at a compound annual rate of 36%, but from a low base and the market is well below its potential level. Out of total credits issued worldwide between 2016 and 2021, only about 11% stem from African countries, and the bulk of these come from a few large projects. It is estimated that Africa currently generates only 2% of its annual carbon credit potential.

### **Africa's blue wealth**

Africa is home to:

63 international river basins covering approximately 64% of the continent's land area. Wetlands constitute 1% of Africa's total land surface area (Sudd in South Sudan and Okavango in Botswana are among the world's biggest).

Six out of the world's 66 large marine ecosystems: the Agulhas Current, the Somali Current, the Benguela Current, the Canary Current, the Guinea Current and the Mediterranean. Three of these six large marine ecosystems rank within the four most productive large marine ecosystems in the world.

### **Africa's agricultural potential is still to deliver**

Africa hosts 65% of the world's remaining uncultivated arable land. Yet the continent generates only 10% of global agricultural output.

Africa hosts at least one sixth of global plant species, with many food crops of African origin; species of wheat, barley, millet, sorghum, teff, coffee, cowpea and oil palm.

According to the Africa Food Summit (Dakar, January 2023), Africa has the potential to feed 9 billion people in the world by 2050, far more than the current world population.

With the removal of barriers to agricultural development aided by new investments, Africa's agricultural output could increase from \$280 billion per year to \$1 trillion by 2030.

However, Africa still has the highest prevalence of moderate or severe food insecurity in the world (57.9%), with numbers currently soaring. 42 African countries are net food importers.



**Africa is home to the 2<sup>nd</sup> largest and longest rivers and aquatic areas in the world (the Nile and the Congo)**








**The African Great Lakes account for 27% of global surface freshwater, the largest proportion in the world**



**Africa hosts 65% of the world's remaining uncultivated arable land**



## Selected African countries: production of key agricultural commodities (2021)

Commodity	Leading African producers	Combined % of world production	Africa's % of world production	Leading global producer (tonnes)
 Cocoa beans	Côte d'Ivoire Ghana Cameroon	59.4%	67.6%	Côte d'Ivoire (2,200)
 Coffee, green	Ethiopia Uganda Côte d'Ivoire	9.6%	13.5%	Brazil (2,993.8)
 Tea leaves	Kenya Uganda Malawi	6.8%	7.9%	China (13,768.9)
 Rice	Nigeria Egypt Madagascar	1.8%	3.7%	China (214,403.9)
 Wheat	Egypt Morocco Ethiopia	2.4%	3.2%	China (136,952)

Source: MIF based on FAO

**Agriculture: a priority for the African Union**

- The Comprehensive African Agricultural Development Programme (CAADP) (2003)
- The African Leaders for Nutrition (ALN) (2018)
- The Continental Nutrition Accountability Scorecard (2019)
- 2022 African Year of Nutrition: "Strengthening Resilience in Nutrition and Food Security on The African Continent"
- AfDB 10-year strategy (2013-2022). Agriculture and food security
- 2023: Ibrahim Mayaki nominated AU's Special Envoy for Food Systems

### Culture and creation: heritage, music, film, literature, architecture, arts

139 UNESCO World Heritage sites in Africa



**43** Natural Heritage sites (4 transboundary)

**90** Cultural Heritage sites (1 transboundary)

**6** Mixed Heritage Sites (1 transboundary)

Transboundary Sites

- Benin, Burkina Faso, Niger
- Cameroon, Central African Republic, Congo Republic
- Côte d'Ivoire, Guinea
- Zambia, Zimbabwe
- Gambia, Senegal
- Lesotho, South Africa

Key

- Natural Heritage site
- Cultural Heritage site
- Mixed Heritage Site (Natural & Cultural)

Africa hosts 12% of the World's Heritage sites and 10% of the World's Cultural Heritage sites

DR Congo hosts the most natural heritage sites in Africa (5)

Morocco hosts the most cultural heritage sites in Africa (9), followed by Ethiopia (8)



Source MIF

### Music: boosted by digital music streaming platforms

In Africa revenues from digital music streaming platforms are expected to grow to \$500 million annually by 2025, up from \$100 million in 2017.

- Rapid urbanisation in African countries has increased the consumption of creative goods and services.
- African diaspora are the primary consumers of African entertainment, serving as the introducers of culture and creative outputs from the continent to the global market.

Following successful charting for African music globally due to social media platforms such as Instagram and Tik Tok, many global music companies are entering the African market.

Music streaming service Audiomack reported African artists such as Burna Boy, Rema, Kizz Daniel and Fireboy DML all had over 300 million streams on their platform. In August 2022, eight African artists were in the top ten most streamed artists for Audiomack.

Streaming giants such as Spotify, Apple Music and Boomplay are pivoting to better enter the growing African market.

### Partnerships between global companies and African labels: on the rise

In 2019, Warner Music Group announced a global partnership with Nigeria-based record label Chocolate City.

In 2022, Universal Music Group launched Virgin Music Africa Label for independent African artists and labels, with 15,000 music titles, 50 partner labels and around 100 artists from 25 countries on the continent.

African music genres such as Afrobeats, Afropop, Rhumba and Amapiano have become increasingly popular on the continent and internationally.



In Africa, revenues from digital music streaming platforms are expected to grow to \$500 million annually by 2025.

**8 African artists were in the top 10 most streamed artists for Audiomack in August 2022**

**Streaming giants such as Spotify, Apple Music and Boomplay are all pivoting to Africa**

### 10 most streamed African artists on Spotify in 2022

- 1 Burna Boy, Nigeria
- 2 Wizkid, Nigeria
- 3 Tems, Nigeria
- 4 Asake, Nigeria
- 5 Ayra Starr, Nigeria
- 6 Zakes Bantwini, South Africa
- 7 Sha Sha, Zimbabwe
- 8 Kabza De Small, South Africa
- 9 Eddy Kenzo, Uganda
- 10 DJ Snake, Algeria

### Film industry: a \$20 billion potential?

The top 10 film industries across Africa produce almost 5,000 films a year with the top three being in Nigeria (2,599), Ghana (600) and Kenya (500).

The largest industry on the continent, Nollywood (the Nigerian industry) has enabled the emergence of a local production and distribution industry with its own economic model. It is also pursuing a digital revolution that was accelerated during COVID-19.

There is still a huge untapped potential on the continent. The industry generates \$5 billion in annual revenue out of a potential \$20 billion.



#### Major African prize-winning films between 2011 and 2021

- The Square (Egypt) - Toronto International Film Festival - People's Choice Documentary Award (2013)
- Timbuktu (Mauritania) - Festival de Cannes, Cesar - Best Feature Film, Best Director, Best Original Screenplay, Best Cinematography, Best Sound, Best Film Editing and Best Original Score (2014)
- Fatwa (Tunisia) - Carthage Film Festival - Golden Tanit (2018)
- Atlantics (Senegal) - Festival de Cannes – Grand Prix (2019)
- My Octopus Teacher (South Africa) - Oscar – Best Documentary Feature (2021)

The film industry in Africa generates \$5 billion in annual revenue out of a potential \$20 billion

### Literature: Africa is home to numerous award winning authors

#### 10 prized African authors (classic and contemporary)

Chimamanda Ngozi Adichie (Nigeria) - Orange Prize, now Women's Prize for Fiction (2007); National Book Critics Circle Award for Fiction (2014)

Hemley Boum (Cameroon) - Le Grand prix littéraire d'Afrique noire Awards (2015 and 2019); Prix Kourouma (2020)

Ben Okri (Nigeria) – Booker Prize (1991) and Commonwealth Writers Prize (African Region Best Book) (1987)

Maaza Mengiste (Ethiopia) - Edgar Award (2021)

Laila Lalami (Morocco) - Hurston/Wright Legacy Award (2015)

Djaili Amadou Amal (Cameroon) - Orange Book Prize (2019)

Tsitsi Dangarembga (Zimbabwe) - Booker Prize (2020)

Late Prof. Chinua Achebe (Nigeria) - International Booker Prize (2007)

Ngugi wa Thiongo (Kenya) - International Nonino Prize (2001)

Abdulrazak Gurnah (Tanzania) - Nobel Prize for Literature (2021)



## Architecture

### 10 world-renowned African architects

David Adjaye (Ghana) - designed the Smithsonian National Museum of African American History and Culture

Kunle Adeyemi (Nigeria)

Christian Benimana (Rwanda)

Francis Kéré (Burkina Faso) - Pritzker Prize (2022), designed the 2017 Serpentine Pavilion

Mariam Kamara (Niger)

Mokena Makeka (South Africa)

Mphethi Morojele (Lesotho)

Tosin Oshinowo (Nigeria)

Akosua Obeng (Ghana)

Y Tsai (South Africa)



### Visual arts: contemporary African art on the rise

A growing demand for contemporary African art is drawing the attention of international art collectors and curators. The Investec's Cape Town Art Fair hosts African artists, while also hosting 23,000 people and 100 galleries which are from Africa.

According to ArtTactive, sales of work by African artists surged by 44.1% in 2021, from \$50.2 million to \$72.4 million. In 2021, the average price for modern and contemporary African art showed an increase of 20.4%, up from 19.7%.



### 10 world-renowned African artists

- 1 Adel Abdessemed - Algeria
- 2 Aboudia Diarrassouba - Côte d'Ivoire
- 3 Michael Armitage - Kenya
- 4 Njideka Akunyili Crosby - Nigeria
- 5 Marlene Dumas - South Africa
- 6 William Kentridge - South Africa
- 7 Julie Mehretu - Ethiopia
- 8 Chéri Samba - DR Congo
- 9 Irma Stern - South Africa
- 10 Barthélémy Toguo - Cameroon

In 2021, sales of work by African artists surged by 44.1%

In 2021, the African modern and contemporary art market showed a 20.4% increase in prices.

In 2021, West African art saw a 111.4% increase in sales.

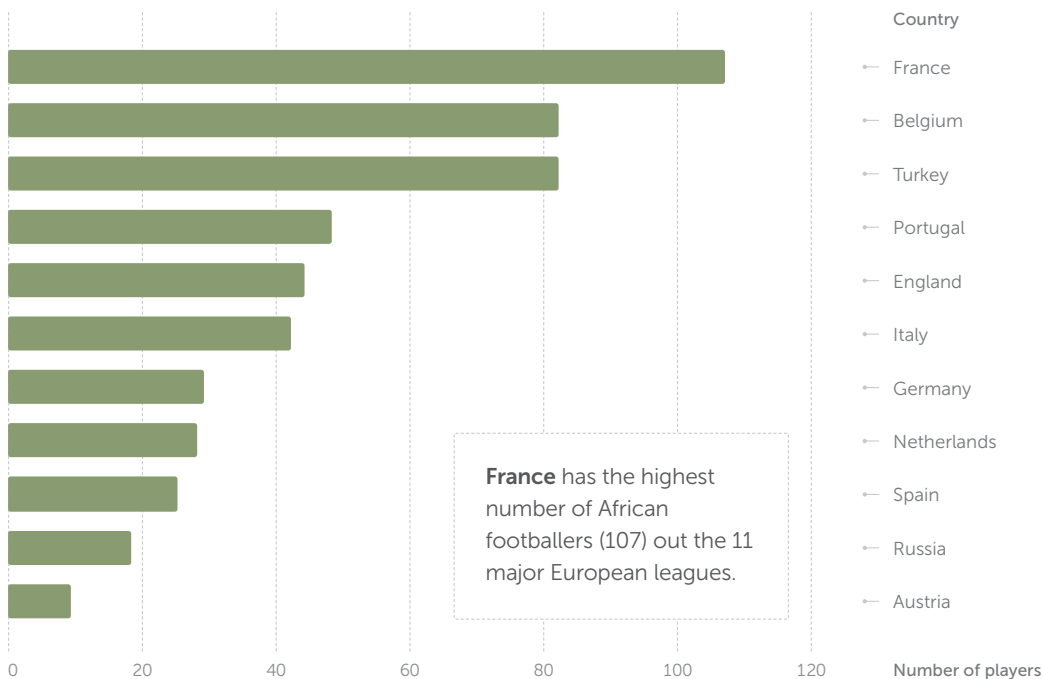
#### Last 10 African-born Nobel laureates

- 1 Wangari Maathai (Kenya) - Peace (2004)
- 2 Mohamed ElBaradei (Egypt) - Peace (2005)
- 3 Jean-Marie Gustave Le Clézio (Mauritius) - Literature (2008)
- 4 Ellen Johnson Sirleaf (Liberia) - Peace (2011)
- 5 Leymah Gbowee (Liberia) - Peace (2011)
- 6 Serge Haroche (Morocco and France) - Physics (2012)
- 7 Michael Levitt (South Africa) - Chemistry (2013)
- 8 Denis Mukwege (DR Congo) - Peace (2018)
- 9 Abiy Ahmed (Ethiopia) - Peace (2019)
- 10 Abdulrazak Gurnah - Literature (2021)

## Sports: an array of global sports stars from Africa

### African players in European football leagues

#### European football by number of African players employed (2021)



As of 2021, 11 major European football leagues have 514 African players in total. France has the highest number at 107 players, while Austria has the lowest number at nine.

Source: MIF based on KMPG

### Top African countries represented in the major European leagues

In total, the top ten African countries by number of African footballers playing in the major 11 European leagues account for 395 players.



As of March 2023, Victor Osimhen from Nigeria is the most valuable African football player (€102.1 million), followed by Mohamed Salah and Achraf Hakimi.

Eight first division European football clubs owe at least 40% of their squad value to African players, with AC Ajaccio in French Ligue 1 with the highest percentage at 54.4%.

### African football is globalising

The most recent African Cup of Nations 2021 (AFCON) was broadcast in 157 countries around the world, with 65 million viewers in Nigeria alone.

Social media is driving the globalisation of African football particularly platforms such as Tik Tok which generated 2.5 billion views with content related to the #afcon2021 hashtag.

### Basketball: Africa has a growing presence

The National Basketball Association (NBA) in North America has 13 African-born players in the league, and about 40 with one African-born parent.

According to the International Basketball Federation (FIBA) World Rankings, African countries are becoming more competitive basketball nations. The Nigerian Men's team ranks first in Africa and 23<sup>rd</sup> in the world. The Mali Youth Men's team ranks 20<sup>th</sup> in the world; the Nigerian Women's team ranks 14<sup>th</sup> in the world, and the Mali Youth Women's team ranks 16<sup>th</sup> in the world.

### East African dominance in long-distance running

Eastern African domination in long-distance running began in 1960, with Ethiopia Abebe Bikila's Rome Olympic Marathon win. He won the gold medal again four years later in Tokyo setting the world record in both races.

East African athletes are still dominating the sport and continue to set the fastest times each year. In the last five years Ethiopian and Kenyan athletes have dominated world marathon events.

Over 100 Africans now play in the American Football League (NFL)



At the 2022 FIFA World Cup in Qatar, Morocco became the first African team ever to reach a World Cup semi-final

## World: men's marathon winners (2019-2023)

Athlete Name	Country	Event
Gadisa Shumie	Ethiopia	Seville Marathon 2023
Eliud Kipchoge	Kenya	Berlin Marathon 2022
Titus Ekiru	Kenya	Milan Marathon 2021
Evans Chebet	Kenya	Valencia Marathon 2020
Kenenisa Bekele	Ethiopia	Berlin Marathon 2019

## World: women's marathon winners (2019-2023)

Athlete Name	Country	Event
Rosemary Wanjiru	Kenya	Tokyo Marathon 2023
Ruth Chepngetich	Kenya	Chicago Marathon 2022
Joyciline Jepkosgei	Kenya	London Marathon 2021
Peres Jepchirchir	Kenya	Valencia Marathon 2020
Brigid Kosgei	Kenya	Chicago Marathon 2019

**Top African athletes according to ESPN Fame 100 based on Google trend scores, social media following and the amount of money they bring through endorsement deals (as of 2019):**

- 1 Mohamed Salah (Egypt) - football
- 2 Pierre-Emerick Aubameyang (Gabon) - football
- 3 Dale Steyn (South Africa) - cricket
- 4 David Miller (South Africa) - cricket
- 5 Riyad Mahrez (Algeria) - football
- 6 Gervinho (Côte d'Ivoire) - football
- 7 Asamoah Gyan (Ghana) - football
- 8 Sadio Mané (Senegal) - football
- 9 Faf du Plessis (South Africa) - cricket
- 10 JP Duminy (South Africa) - cricket

Source: MIF based on ESPN

The fastest marathon runners over the last 5 years are all from Eastern Africa

Abebe Bikila from Ethiopia won the Olympic Marathon in Rome (1960) and Tokyo (1964), setting the world record in both races

Kenya's Kelvin Kiptum breaks London Marathon record in April 2023

Egyptian footballer Mohamed Salah features among the 30 most famous athletes globally, with endorsements of \$11 million and a social media following of 21.3 million.

In 2018, Egyptian footballer Mohamed Salah broke the record for most goals in a 38-game season in the English Premier League, the world's most popular football league.



# SPOTLIGHT

## Africa's overarching hurdle: stability and security

### Three of the top ten global hotspots are in Africa

According to the International Crisis Group, of the ten conflicts to watch in 2023, three are in Africa - in Ethiopia, DR Congo and the Sahel.

- **Ethiopia** – Implementation of the November 2022 Ethiopia - Tigray Pretoria Peace Agreement is ongoing.
- **The Great Lakes: DR Congo** – Re-emergence of the M23 Group.
- **Sahel** – successive coups and increasing terrorism footprint involving Mali, Burkina Faso and Niger.

Of the International Crisis Group's "10 Conflicts to Watch in 2023", three of them are in Africa: Ethiopia, DR Congo and the Sahel.

### Growing violence against civilians

Africa is host to the largest number of increasing one-sided violences compared to any other region.

There are approximately 25 active militant Islamist groups operating in Africa, up from just 5 in 2010 – an increase of 400%.

Violence against civilians is growing, driven largely by the activity of private military groups and violent extremist organisations.

### Fifteen of the top 20 most fragile states globally are African

#### 20 most fragile countries: Fragile States Index Score (2022)



**2 official al-Qaeda affiliates and 8 Islamic State provinces operate across Africa**

**The 15 most fragile states in Africa are home to 663 million people, equivalent to almost twice the US population in 2022**

The IAG sub-category *Security & Safety* is the most declined sub-category between 2012-2021.

Somalia, South Sudan and Central African Republic rank in the top 5 most fragile states in 2022.

### Fragility increasing among many African countries

Two out of the five most deteriorated states globally between 2012 and 2022 on Fund For Peace's 'Fragile States Index' are African: Mali and the Central African Republic.

Country	2012 Score	2022 Score	Score Change
Mali	77.9	98.6	20.70
Syria	94.5	108.4	13.90
Yemen	104.8	111.7	6.90
CAR	103.8	108.1	4.30
Myanmar	96.2	100.0	3.80
Cameroon	93.1	96.0	2.90
Eritrea	94.5	95.9	1.40
Ethiopia	97.9	99.3	1.40
South Sudan	108.4	108.4	0.00
Afghanistan	106.0	105.9	-0.10
Niger	96.9	95.2	-1.70
Chad	107.6	105.7	-1.90
Burundi	97.5	95.4	-2.10
Sudan	109.4	107.1	-2.30
Guinea	101.9	99.6	-2.30
Nigeria	101.1	97.2	-3.90
DR Congo	111.2	107.3	-3.90
Somalia	114.9	110.5	-4.40
Haiti	104.9	99.7	-5.20
Zimbabwe	106.3	97.8	-8.50

Source: MIF based on The Fund for Peace

 3/4 of the 20 most fragile countries globally in 2021 are African



# Chapter 02.

## The world in Africa: shifting trends



Trade partners shift

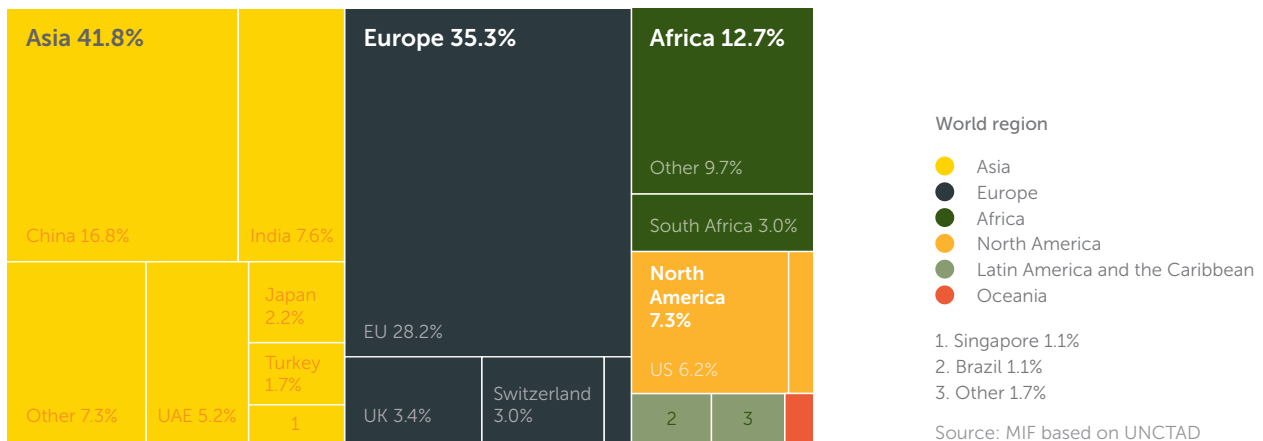
Asia has become Africa's primary trading partner

The latest data shows that over three quarters of Africa's merchandise trade is with Asia and Europe, both in exports and imports.

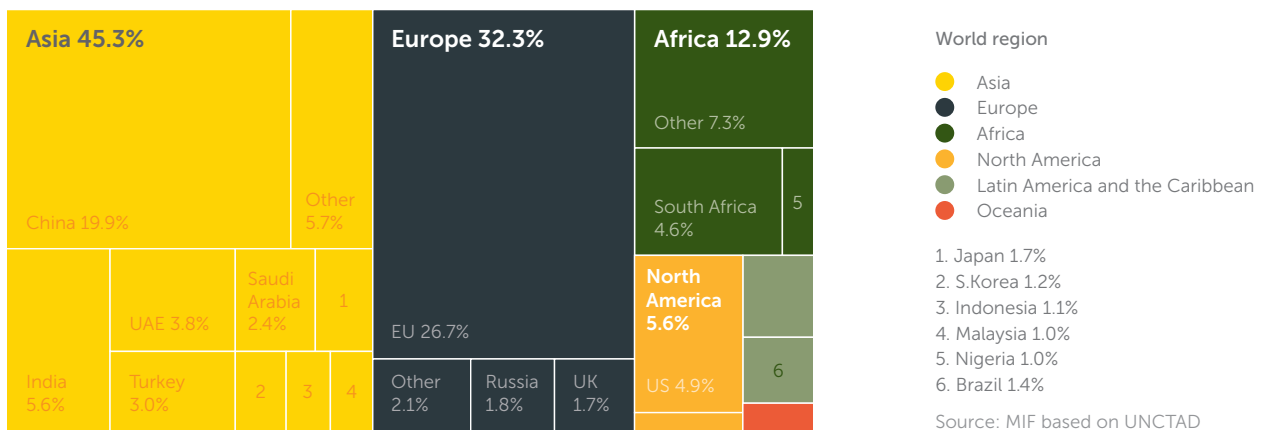
- The EU remains the largest trading partner of African countries, with the bloc accounting for over a quarter of Africa's exports (28.2%) and imports (26.7%).
- China is the biggest trading partner at country level, both in terms of exports (16.8%) and imports (19.9%).

Asia now represents almost 42% of Africa's exports and over 45% of its imports, above Europe in both cases

African countries: destination of merchandise exports (2021)



African countries: origin of merchandise imports (2021)



Since 2000, the EU's share of Africa's export market has dropped by 1/4 and the US's by 2/3

In 2000, Europe was the destination for almost half of all African exports, while North America accounted for a larger share than Asia. While Europe remains a key trade partner, Africa's trading relationships have undoubtedly pivoted east this century.

Africa's intra-regional trade accounts for less than 13% of the total

**US African Growth and Opportunity Act (AGOA)**

The AGOA is a US Trade Act, enacted in 2000 and renewed to 2025. The legislation significantly enhances market access to the US for "qualifying" sub-Saharan African countries in products such as apparel and footwear, wine, certain motor vehicle components, some agricultural products, chemicals, steel and others. With the deal expiring in 2025, African countries are pulling together to lobby the US Congress to approve the renewal of the AGOA this year.

**Between 2000 and 2021:**

- China's share of Africa's export market has increased five-fold.
- The current EU members share of Africa's export market has dropped by 1/4.
- The US's current share of Africa's export market has decreased from 16.5% to 6.2%
- Africa's exports to India have increased more than 11-fold.
- Africa's exports to the UAE have increased more than 60-fold.

**Trade models stick**

**Africa's commodity-led export model persists**

Though Africa's trading partners have shifted over the last decade, much of the trading model that has been dominant since the colonial era remains in place, exporting resources in a raw or unprocessed state and importing manufactured products from outside the continent.

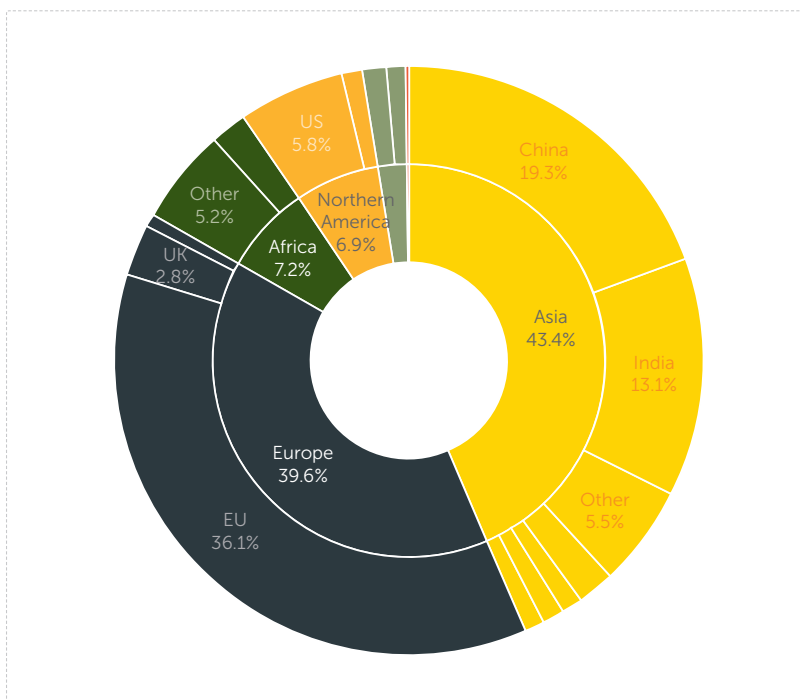
**More than 3/4 of African fuel exports head to Asia (43.4%) and Europe (39.6%)**

Fuels, namely fossil fuels such as coal, oil and gas constitute the largest share of Africa's exports.

African countries' fuel exports equate to almost two and a half times its fuel imports, despite almost 600 million people in Africa lacking access to electricity.

Primary commodities account for more than 3/4 of Africa's exports, a far higher share than in any other region

Africa: destination of fuel exports (2021)



Coal, oil and gas account for over 1/3 of Africa's exports

Over 3/4 of African fuel exports head to Europe and Asia

World region

- Asia
- Europe
- Africa
- North America
- Latin America and the Caribbean
- Oceania

Source: MIF based on UNCTAD

In 2021, over one third of Africa's fuel exports went to the EU (36.1%).

- Italy (27.7%) and Spain (24.3%) accounted for over half of these exports.
- Northern Africa was the origin of almost two thirds (64.6%) of Africa's fuel exports to the EU.

Almost half (43.4%) of Africa's fuel exports went to Asia, with China (19.3%) and India (13.1%) being the main recipient countries.

- Exports from Angola to China account for over 10% (10.7%) of the continent's total fuel exports and over half (55.1%) of all African fuels exported to China.

Four out of Africa's five biggest oil and gas companies are private firms based in Europe and the US.

#### Africa: five biggest oil and gas companies (2021)

Rank	Company	Nationality	Ownership
1	Sonatrach	Algeria	State
2	Shell	UK/Netherlands	Private Sector
3	Total	France	Private Sector
4	Chevron	US	Private Sector
5	Mobil	US	Private Sector

#### Oil giant Nigeria imports refined petroleum products from Europe for its energy needs

Nigeria has the 11<sup>th</sup> largest reserves of crude oil in the world, but faces an ever-growing fuel crisis.

- In Nigeria, almost half (44.6%) of the population lack access to electricity and 85% lack access to clean cooking fuels.

The shortage of refining capacity is the main driver of Nigeria's fuel crisis. It has long made Nigeria dependent on imported petroleum products. The cost of importing refined petroleum products exceeded Nigeria's exports of refined petroleum by US\$43.56 billion in 2020.

- Nigeria exports almost half (45.8%) of its crude oil to Europe and imports over 80% of its refined petroleum from Europe, despite Europe having fewer than half of the reserves.

#### Towards the 7<sup>th</sup> Africa Singapore Business Forum

The 7<sup>th</sup> Africa Singapore Business Forum is scheduled to take place at the end of August in the city-state. The event is organised every two years by Enterprise Singapore - a government agency that has offices in Accra, Nairobi and Johannesburg.

In 2021, over 1/3 of Africa's fuel exports went to the EU

Only 1 African company - the Algerian Sonatrach - is among the 5 largest oil and gas companies on the continent

Nigeria refines 1 barrel of oil for every 4,132 refined in Europe, despite having more than twice the crude oil reserves

The Dangote Oil Refinery, being built in the Lekki Free Zone near Lagos, Nigeria, is a \$19 billion dollar project that will create a market for \$21 billion per annum of Nigerian crude - a key milestone for upgrading the oil value chain on the African continent



**Energy security: Europe's scramble for African gas to reduce dependency on Russia**

Since Russia's invasion of Ukraine, several European leaders have signed deals with their African counterparts to develop and export the continent's vast reserves of natural gas or expressed their intent to do so, u-turning on previously held opposition to fossil fuel development in Africa.

Between April 2022 and January 2023, at least 8 African countries have signed gas agreements with European oil and gas companies: BP, Equinor, Eni, Perenco, Shell and Total

**Over half of Africa's mineral exports go to Asia**

Minerals, including metals, precious stones and ores, account for the second biggest share of Africa's exports.

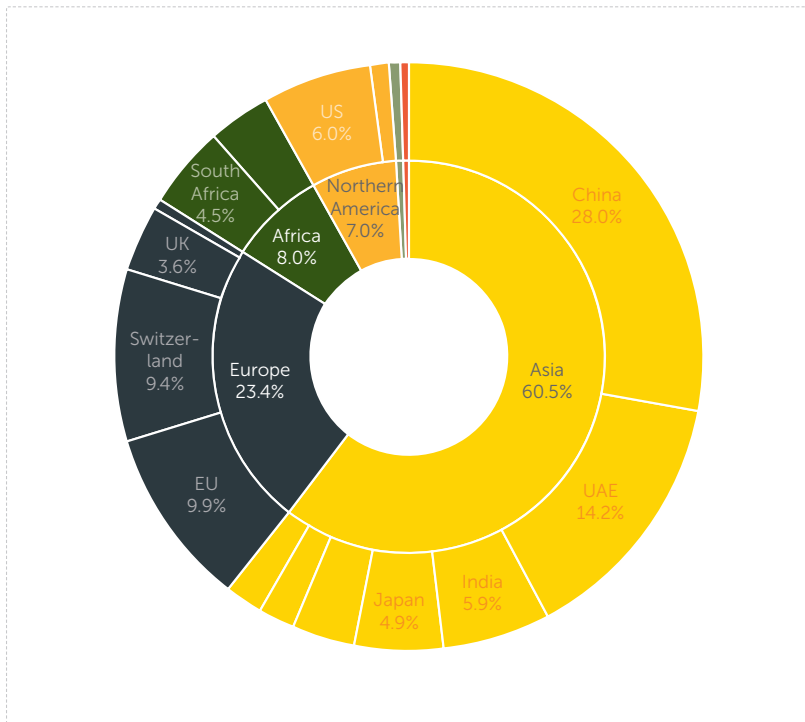
Africa is a net exporter of minerals, exporting over six times the volume of ores, metals, and precious stones that it imports.

Asia accounts for almost two thirds (60.5%) of exports of ores, metals and precious stones from Africa, while Europe accounts for almost one quarter (23.4%).

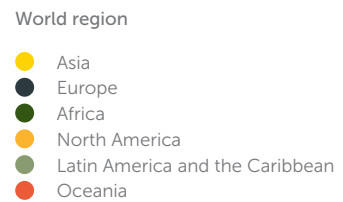
China (28.0%) is the largest importer of African minerals, followed by the UAE (14.2%) and Switzerland (9.4%).

Asia accounts for almost 2/3 of ores, metals and precious stones exports from Africa

**Africa: destination of exports of ores, metals, and precious stones (2021)**

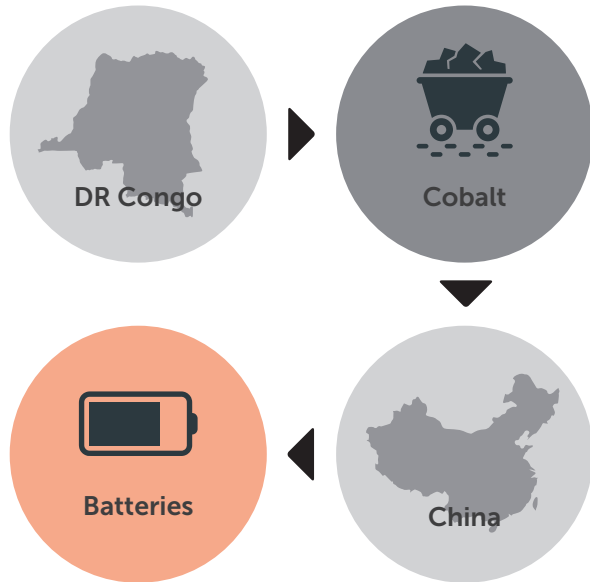


Russia's geological survey agency ASGA has drawn up geological maps detailing all mineral and metal deposits in Africa



Source: MIF based on UNCTAD

### Congolese cobalt underpins China's world leading battery industry



**More than 70%** of global cobalt is mined from **DR Congo**

**96.7%** of **Congolese** cobalt is exported to **China**.

Cobalt's primary use is in batteries. **China** is the number one global exporter of batteries.

Source: MIF Based on USGS & Atlas of Economic Complexity

Congolese people are losing out to China on value chains in batteries that could be taking place domestically, but new initiatives are trying to bring these processes back to the region.

- On 13 December 2022, the US signed an MoU with DR Congo and Zambia to cooperate on fostering African electric vehicle battery supply chains, processing cobalt in the Copper Belt region.
- In April 2022, DR Congo and Zambia established the DR Congo-Zambia Battery Council to oversee cooperation within the electric vehicle battery value chain.

### African gold heads to the United Arab Emirates

Africa's exports to the UAE have more than quadrupled in the last 10 years. This is largely accounted for by gold which makes up more than half (52.2%) of Africa's exports to the Gulf state. The UAE is developing Dubai into a global gold exchange to compete with London and Geneva on the back of African gold.

This has triggered a surge in illicit gold flows from DR Congo. To combat the problem, in January 2023 the DR Congo government launched Primera Gold: a joint venture with a UAE-based company to export gold mined by hand to a refinery in the Gulf.







### Benin using industrial zones to change trade pattern.

Through the establishment of the Glo-Djigbé industrial zone, Benin is looking to convert its raw cotton exports into a textiles industry. The initiative aims to create 300,000 jobs by 2030; up to 250,000 jobs are expected in spinning, cotton weaving and garment manufacturing. Discussions over contracts have already been held with brands including SanMar, H&M and Zara.

## SPOTLIGHT

### Who owns Africa's largest mines?

Africa: largest mines (2022)

Mineral	Mine	Country	Operating Company	Company Nationality
 Gold	Kibali	DR Congo	Kibali Goldmines SA: Barrick (45%), AngloGold Ashanti (45%) and SOKIMO (10%)	Canada/South Africa/DR Congo
 Diamonds	Jwaneng	Botswana	De Beers (85%) and The Government of Botswana (15%)	UK/Botswana
 Copper	Kansanshi	Zambia	Kansanshi Mining: First Quantum Minerals Ltd (80%) and Zambia Consolidated Copper Mines-Investment Holdings (20%)	Canada/Zambia
 Cobalt	Kamoto	DR Congo	Glencore (75%), Gecamines (20%) and SIMCO (5%)	Switzerland/DR Congo
 Bauxite	Sangaredi	Guinea	Compagnie des Bauxites de Guinée: The Guinean Government (49%) and Halco Mining (51%)	US/Guinea
 Platinum	Impala Mine	South Africa	Impala Platinum Holdings	South Africa

Source: MIF based on multiple sources\* \*For full sources list, please refer to notes/reference list sections at end of report.

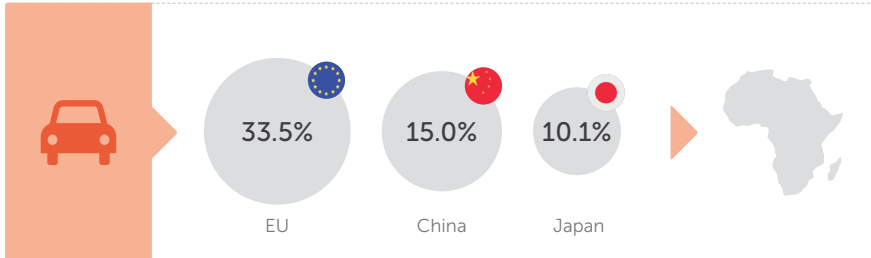
### China & Russia: trading services for resource access

The Wagner Group has helped secure Russian access to key resources across Africa. In the Central African Republic, it has provided security services and training to the government in exchange for access to gold and diamonds. Similarly, in Sudan and Libya, the Wagner Group has facilitated Russian access to gold and oil mining sites respectively.

China maintains a significant mining presence on the continent, often utilising minerals-for-infrastructure contracts in countries such as DR Congo where Chinese investors own as much as 70% of the copper and cobalt mines.

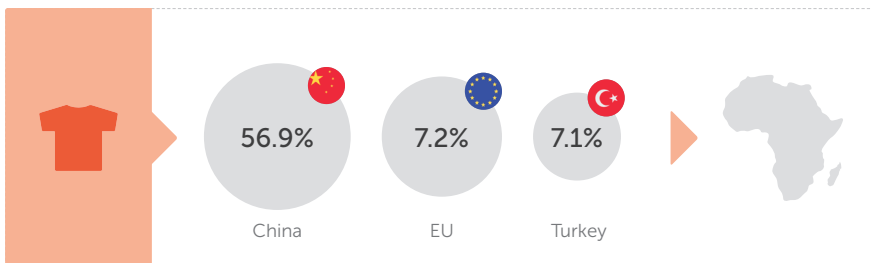
## Africa imports most of its key manufactured goods from outside the continent

### Africa: origin of imported road vehicles (2021)



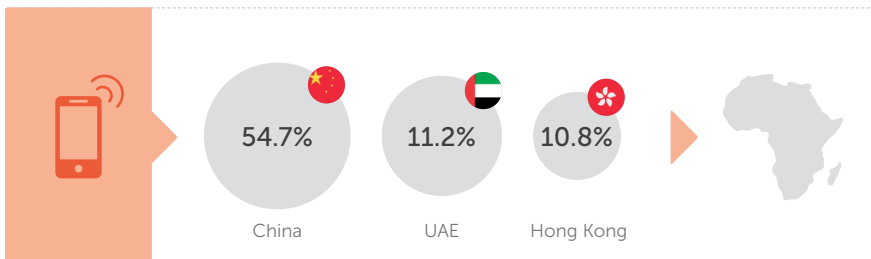
Road vehicles in Africa: primarily imported from the EU

### Africa: origin of imported clothing (2021)



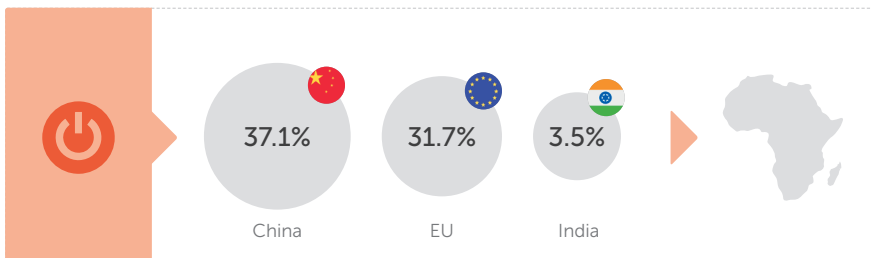
Clothing in Africa: primarily imported from China

### Africa: origin of imported telecomms equipment (2021)



Electronic appliances and telecomms equipment: primarily imported from China

### Africa: origin of imported electronic appliances (2021)



### Vaccine diplomacy

The COVID-19 pandemic triggered the rise of vaccine diplomacy. Vaccine donations were mostly made via COVAX, the global vaccine-sharing scheme, or bilaterally (this included China's CanSino/Sinopharm/Sinovac vaccines, Russia's Sputnik vaccine or India's Vaccine Maitri initiative).

Africa imports 95% of its routine vaccine needs

**African rising public debt level still stands below other world regions**

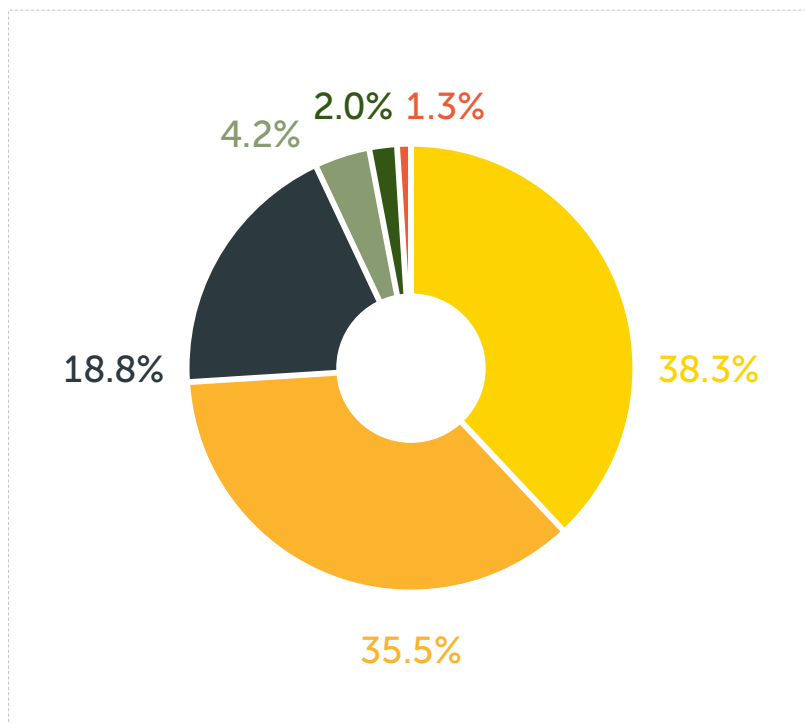
In absolute terms, African governments have less debt than any other world region.

The total debt stock owed to creditors by African governments equates to just under \$2 trillion. This is less than the German government’s expenditure for 2023 alone.

Even adjusted for GDP, African debt does not stand out as being uniquely high with 48 African countries with lower public debt-to-GDP ratios than the US (122.9%) in 2023.

Yet eight of the nine countries listed by the IMF as being in ‘debt-distress’ in 2023 are African. All four countries to make use of the G20’s Common Framework for Debt Treatments are African (Chad, Ethiopia, Ghana and Zambia).

**World regions: share of total global public debt (2023)**

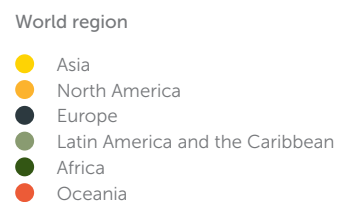


Note: Countries lacking data for gross debt position for 2023 have been excluded, including Libya, Somalia, Zambia in Africa and Afghanistan, Lebanon, Sri Lanka, Syria, Ukraine, Venezuela.

Africa accounts for just 2.0% of global public debt in 2023

Japan (261.1%) and Greece (169.8%) have higher debt-to-GDP ratios than any African country

In the very latest round of the IMF Fiscal Monitor, released in April 2023, the UK debt-to-GDP ratio reaches 106.3%, higher than every African country with data but Cabo Verde (120.2%), Eritrea (146.3%) and Sudan (151.1%).



Source: MIF based on IMF

**African public debt structure is the main problem**

**African public debts are mainly held by non-African lenders in foreign currencies**

African countries’ public debts are uniquely burdensome, in part because they are mainly owed to international rather than domestic lenders, making debt harder to refinance or restructure.

- Of the 10 African countries with data on creditor residency, seven owe more than half of public debt to overseas creditors.

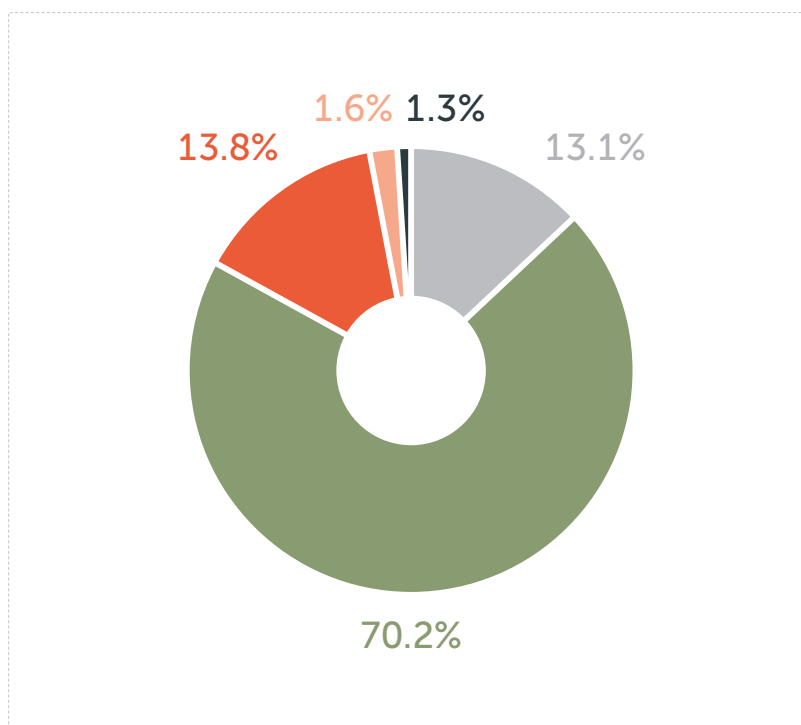
Over 70% of public debt in Canada, China, the UK, and US is owed to domestic creditors

External lenders prefer to lend to developing countries in their own currency or international 'hard currencies' (e.g. US dollar or Euro). Foreign currency debt carries an exchange rate risk. Industrialised countries usually borrow in their own currencies.

- 31 African countries have more than 50% of their public external debt denominated in US dollars.
- In the UK (£), China (CN¥), Canada (C\$), and the US (US\$) over 98% of central government debt is denominated in the local currency.

Since 2010, all but 2 African currencies have lost value against the US dollar, increasing the size of dollar denominated debt.

#### Africa: currency of public external debt (2021)



Over 70% of Africa's public external debt is US dollar-denominated

#### World region

- Other/multiple currencies
- US dollar (\$)
- Euro (€)
- Japanese Yen (¥)
- SDR

Source: MIF based on World Bank

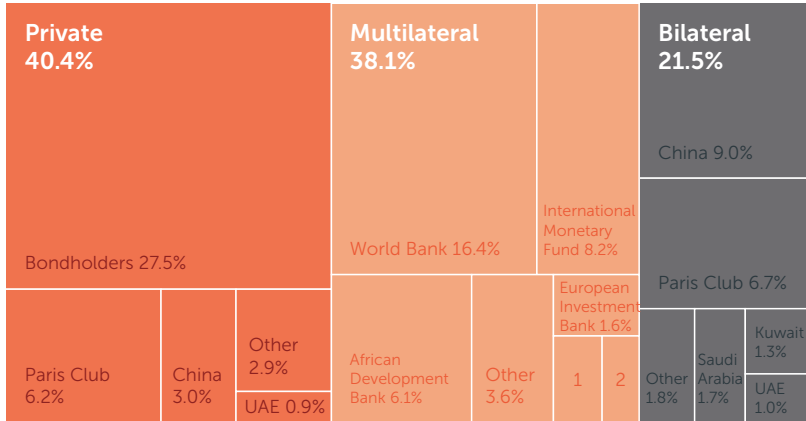
#### Private sector is now the largest holder of African public external debts

In 2021, more than one third (40.4%) of Africa's public external debt was owed to the private sector.

The World Bank (16.4%) is Africa's largest official creditor, while China (9.0%) is the largest bilateral (nation state) creditor.

Private bondholders hold over 1/4 (27.5%) of Africa's public external debt, more than any single official creditor

Africa: creditors of public external debt (2021)



Creditor type

- Private
- Multilateral
- Bilateral

1. Islamic Development Bank 1.3%
2. Arab Fund for Economic & Social Development 1.0%

Source: MIF based on World Bank

Note: IMF figure is not inclusive of Special Drawing Rights (SDRs).

Multiple lenders, multiple financing models and conditions

Africa's multiple lenders provide multiple financing models, which impact the debt structure. The growth of private sector lending has created more burdensome financial conditions, while multilateral lending creates burdensome policy conditions.

1. Private sector: easy credit under punitive financial conditions

- African governments have been motivated by the desire to reduce dependence on aid or conditional loans.
- Private companies have been motivated by the desire to obtain higher returns than the low rates on offer in the Global North since the 2008 financial crisis.

Private sector lenders, primarily motivated by financial considerations, lend at market rates considerably more expensive than official creditors.



The UK alone accounts for more than 1/3 of private sector lending to Africa from Paris Club members, more than France, Germany, Japan, and the US combined

Rating agencies: are they rating Africa's risk correctly?

The amount African countries must pay to borrow from the private sector is influenced by ratings agencies in Western countries. The 'big 3' ratings agencies - Fitch, Moody's and Standard & Poor's (S&P) - are all headquartered in London or New York and have limited presence in Africa. These agencies have been criticised for giving 'arbitrary' and 'unjust' ratings for African countries.

The African Union (AU) is moving forward through the African Peer Review Mechanism (APRM) with a plan to establish an African Credit Rating Agency as an independent entity to provide alternative and complementing rating opinions for the continent.

Over 2/3 of Africa's bilateral debt to the Paris Club is owed to just three countries: France (30.7%), Germany (21.5%) and Japan (19.0%).

In 2021, the average interest rates in sub-Saharan Africa on sovereign bonds (6.0%) were higher than on loans from the World Bank, the AfDB, China or the Paris Club countries.

11.5% of Africa's public external debt is owed to commercial banks, more than all the bilateral debt owed to China (9.0%).



For Zambia, 10-year bond yields are over 30%

### African Repo Market: Liquidity and Sustainability Facility

The Liquidity and Sustainability Facility (LSF), launched in COP26 (Glasgow, November 2021) by the UN Economic Commission for Africa (UNECA), should help boost demand for African government bonds by making them more liquid for international investors. This is designed to cut borrowing costs for African governments and foster cheaper loans for sustainable development.

The 'big 3' rating agencies (Fitch, Moody's and S&P) only have 2 offices in Africa, both in Johannesburg

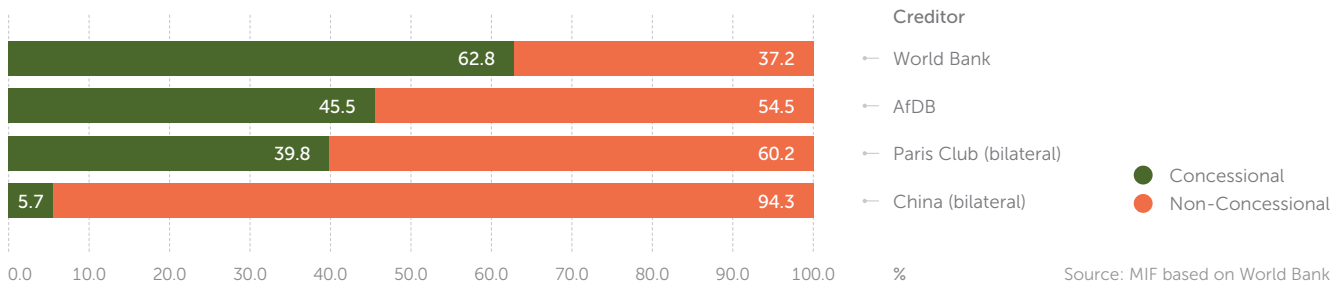
## 2. IMF and World Bank: better financial conditions, but burdensome conditionalities

Lending from the IMF and World Bank to Africa is usually more concessional, with better financial conditions than loans from other lenders. However, loans also come with more policy conditions.

The IMF's proposed loan to Tunisia is conditional on cuts to food and fuel subsidies, at a time when energy and food prices on global markets are abnormally high.

### Multilateral lenders provide better financial terms

#### Africa: concessionality status of external public debt stock by creditor (2021)



IMF loans in particular are usually conditioned on the implementation of an 'IMF programme', often involving austerity measures or trade liberalisation. The measures have been criticised for undermining national sovereignty, hindering development, and inflicting hardship on citizens.

2020-21 IMF loan disbursements to Africa exceeded the total for the previous 15 years combined.

## 3. Chinese lending: non-interference in internal affairs and much needed credit for infrastructure

Though less concessional (more expensive) than other official creditors, Chinese loans have been appealing to African governments because China stresses non-interference as a key principle of its lending to Africa. It has primarily focused on lending for infrastructure projects, much of which has fallen under Beijing's Belt and Road Initiative (BRI), that seeks to connect Asia with Africa and Europe via land and maritime networks.

Almost two thirds of Chinese lending to Africa between 2000 and 2020 has funded investment in transport, power and mining (65.8%).

Chinese lending has been criticised as 'tied aid' due to requirements to use Chinese companies, workers, and materials and the use of Africa's natural resources as collateral. China has also faced criticisms for opaque lending terms.

Africa represents over 1/3 of all the countries currently who have signed a MoU to participate in China's Belt and Road Initiative.



### Current debt relief measures not up to the task

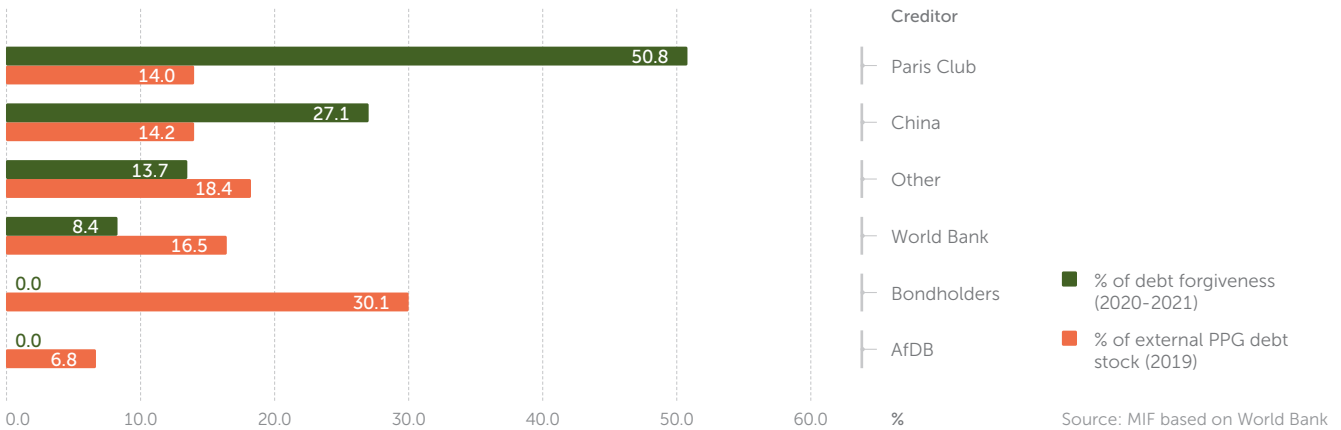
Increased debt servicing costs, plus the combination of multiple crises such as climate change, COVID-19 and Russia's invasion of Ukraine have led many African countries to struggle with debt sustainability.

The crisis has led to calls for creditors to provide relief measures, but Africa's myriad of creditors makes this a challenge. Getting all relevant actors around the same table is difficult. Many are reluctant to provide relief when they think payments will continue to be made to other creditors.

Between 2010 and 2021, external debt servicing payments have more than quadrupled, growing at over 60 times the pace of average fiscal revenues

### The Paris Club is the most flexible on public debt relief, private sector the least

Selected creditors: share of debt forgiveness and reduction on African external debt (2020-2021)



### G20 initiatives have been mostly ineffective

The Debt Service Suspension Initiative (DSSI): endorsed in April 2020 by the G20, the DSSI suspended repayments due on bilateral loans made by the G20's members to some of the world's poorest countries to create fiscal space to respond to COVID-19.

- This only covered 18.6% of debt service repayments for DSSI-eligible African countries, too little for any meaningful impact.
- Some state-owned but autonomous Chinese lenders did not participate in the DSSI.
- Only one private sector creditor globally participated.

The DSSI has now expired.

Multilateral Development Banks, including the World Bank and IMF, did not participate to the DSSI

**The Common Framework for Debt Treatments beyond the DSSI:** In October 2020, the G20 launched the Common Framework (CF) for Debt Treatments beyond the DSSI. The CF obliges all bilateral creditors to inform the IMF how much they are owed by highly indebted countries and to negotiate rescheduling jointly, while obliging the debtor country to take on an IMF programme. However, there has been little progress on debt relief or restructuring.

- Only four countries have applied to the CF – Chad, Ethiopia, Ghana and Zambia, none of which has seen any reduction in debt.
- As of March 2023, only Chad has reached an agreement with creditors, but this just involved restructuring, not reduction.

#### **IMF's additional Special Drawing Rights (SDRs)**

On 2 August 2021, the IMF approved a general allocation of additional Special Drawing Rights (SDRs) of \$650 billion, to boost global liquidity in the aftermath of the COVID-19 crisis.

On 18 May 2021, the Paris Summit on the Financing of African Economies led to the commitment to reallocate \$100 billion of those additional SDRs by the G20 countries to low-income countries.

But the reallocation process remains slow. Almost 2 years after the Paris Summit, donors have committed to \$82 billion so far (this includes \$21 billion from the US still waiting for Congress approval) so far, with half that amount having been paid to the IMF.

A first tranche of \$20 billion made up of French and British SDRs is ready to be paid in the coming months to the African Development Bank (AfDB). AfDB is planning to use them as collateral to collect additional resources.

#### **The African Union's debt sustainability observatory**

The African Union is launching a debt status data bank on its member states, taking the first step to monitor and advise on possible distress. The move will help member states improve on their fiscal governance as the continental body pursues development programmes among members.



**Over 1/2 of servicing payments due in 2021 were made to private creditors. More than 1/4 were owed to private bondholders, the overwhelming majority of which are governed under English or New York law**

**Food: Africa's excessive dependency**

**Food security in Africa**

Africa remains the world region with the highest prevalence of chronic hunger (20%), with a total of 278 million affected by acute hunger in 2021. In addition to an ever-growing population, climate change and the shocks of both COVID-19 and the Ukraine conflict, African countries have little fiscal space for agricultural policies. As a result, the most vulnerable people, namely those living in rural areas, are the most affected and the least capable of dealing with price hikes, already spending up to 60% of their income on food (2015, latest year available).

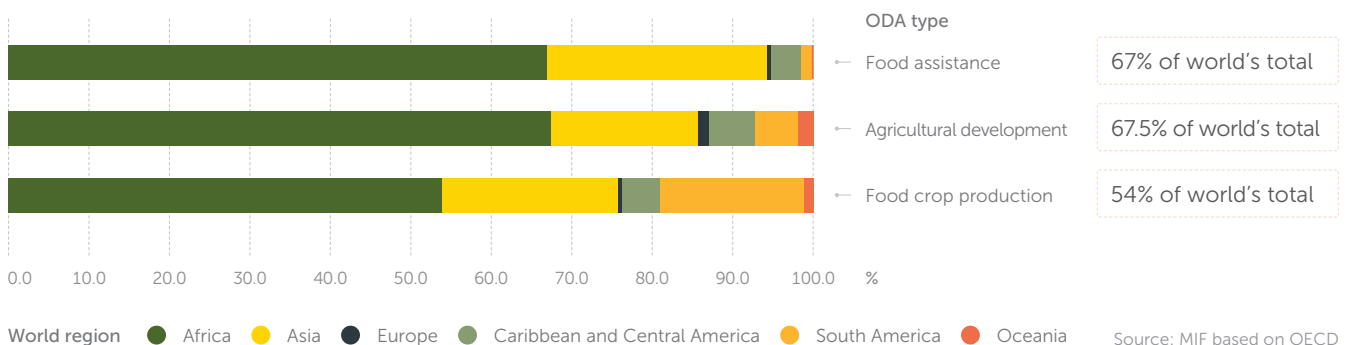
Africa's agriculture is not feeding the continent, resulting in imports of over 100 million metric tons of food at the cost of \$75 billion annually.

Africa has by far the highest cereal import dependency ratio out of all world regions at 29.6% (almost three times as high as Asia's: 8.3%).

As of 2023, 42 out of 54 African countries are net food importers

**Africa is the largest food-based ODA recipient at global level**

**World regions: Food-based ODA (2021)**



**Multiple partnerships**

**EU**

May 2022 EU-Ukraine Solidarity Lanes: Facilitating alternative logistic routes until access to the Black Sea was fully restored.

June 2022 Food security general commitment: Over €2 billion to sub-Saharan Africa and another €1 billion for the Southern Neighbourhood partners.

September 2022 European Development Fund to finance food aid and production: €600 million allocated to food security to ACP countries – €247 + €136 million euros designated for sub-Saharan Africa.

**The EU's Common Agricultural Policy (CAP) – an obstacle for African agriculture?**

The EU's CAP, subsidising European farmers to the tune of €42 billion (\$50 billion) annually, is reported to have undercut agricultural production for wheat and milk powder in Western Africa.

### Multi-stakeholder initiatives: FARM, AATI, PIATA

#### The International Food and Agriculture Resilience Mission (FARM)

Established in April 2022, in cooperation with the G7 and the AU, FARM is supported by France, the European Commission (EC), the European Investment Bank (EIB), the World Food Programme (WFP), the International Fund for Agricultural Development (IFAD) and the Bill & Melinda Gates Foundation. FARM's mission focuses on overcoming export restrictions, supporting the Ukrainian agricultural sector and grain exports, and the launch of the Global Business for Food Security Coalition.

#### The African Agricultural Transformation Initiative (AATI)

Launched in 2022 and co-funded by the Alliance for a Green Revolution in Africa (AGRA), the Bill & Melinda Gates Foundation and IFAD, the AATI is hosted by IFAD and builds on McKinsey & Company's pro bono input. With a budget of \$19.6 million until 2025, AATI is focused on the formulation of strategic agricultural initiatives.

### China

China's approach is to transfer know-how to increase agricultural productivity to meet Africa's food security needs. At the 2021 Forum on China-Africa Cooperation (FOCAC), China pledged to send 500 agricultural experts for policy consultations and capacity trainings in Africa. The Agricultural Technology Demonstration Centers (ATDCs) are set up to introduce and extend new technology for students and farmers. The 2017 China-Africa Agricultural Cooperation for multi-stakeholder cooperation, joined forces with AGRA and PIATA, to leverage China's resources for agricultural transformation in Africa. Between 1987 and 2016, Chinese companies acquired over 253 million land hectares across Africa for agricultural investments.

### Turkey

In 2017, the first Turkey-Africa Agriculture Ministers Meeting and Agribusiness Forum took place in Istanbul with 40 African Ministers of Agriculture alongside FAO and AU representatives. The Turkish Cooperation and Coordination Agency (TIKA) provides agricultural tools, seeds, fertilisers and pesticides to improve local farmers' capacity.

### Japan

Japan is a key global leader in tackling global food security, donating \$130 million the WFP in 2023. The funding will be distributed to the most vulnerable in 37 countries, of which 25 are African. Japan also supports the FAO to enhance food security and nutrition data capacity in Angola, Mali, Senegal, and Tanzania, to monitor SDG 2 ("Zero Hunger").

### Brazil

During his first eight years in office (2003-2010), President Luiz Inacio Lula da Silva devoted special attention to Africa, by focusing on food security and poverty reduction. Africa remained a key focus for projects by the Instituto Lula, including partnerships with the AU, NEPAD and FAO, with a focus on food security.

#### The multi-donor Partnership for Inclusive Agricultural Transformation in Africa (PIATA)

Launched in 2017 with \$280 million, PIATA aims to transform Africa's agricultural systems from subsistence to sustainable business. Partners include the Bill & Melinda Gates and Rockefeller Foundations, the UK, Germany and the US. PIATA was successful in incentivising private sector, public and donor engagement and in reaching farmers. PIATA's impact on inclusive finance, output markets, and farmer outcomes was mixed.

Between 1987 and 2016, Chinese companies acquired over 252 million hectares of land across Africa for agricultural investments

#### The World Bank coordinates the global response to the food crisis heightened by the impact of the Russia-Ukraine war

In May 2022, the World Bank allocated \$30 billion for 15 months - with almost half going to Africa - to combat the global hunger emergency. To help coordinate the response, the World Bank together with the G7 launched the Global Alliance for Food Security (GAFS) that same month, and a Global Food and Nutrition Security Dashboard was developed to track the latest data. As of December 2022, the Bank's food and nutrition security commitments have passed the \$12 billion mark - with almost half going to Africa. The Third Joint Statement from FAO, IMF, World Bank Group, WFP, and WTO on 8 February 2023 called for a prevention of the worsening of the food and nutrition security crisis.

## Health: ODA's potential crowding-out effect?

### Health in Africa

The 2022 IIAG shows that access to healthcare in Africa is worse in 2021 than in 2012. While *Health* has been the third most improved sub-category between 2012-2021, with progress in the indicators *Control of Communicable Diseases*, *Compliance with International Health Regulations* (IHR), as well as *Access to Water & Sanitation*. However, *Control of Non-Communicable Diseases* and *Access to Healthcare*, have deteriorated on the continent since 2012.

**African public health expenditures remain far below 2001 Abuja's pledges** to allocate at least 15% of public budgets to health. Only three countries have ever reached this target: Madagascar (2015, 2016 and 2017), South Africa (2015, 2016, 2017, 2018 and 2019), Sudan (2015).

The COVID-19 pandemic has highlighted Africa's excessive dependency on external provision of vaccines and other health products. Africa accounts for 25% of the global vaccine demand but imports 99% of its routine vaccine needs.

**Increasing Africa's ownership:** The Africa Vaccine Acquisition Task Team (AVATT) was set up by the AU in August 2020 as the African entity responsible for leading the continent's COVID-19 vaccination strategy. Through the COVID-19 procurement agreement signed in March 2021, African countries had access to 400 million doses of the Johnson & Johnson single-shot COVID-19 vaccine. The Partnership for African Vaccine Manufacturing (PAVM), co-launched in April 2022 by the AU and the Africa CDC, committed to achieve 60% of locally produced routine vaccines by 2040.

**Pervasive brain drain in the health sector:** Annually, it is estimated that Africa loses around \$2.0 billion through brain drain in the health sector. One in ten doctors in the UK come from Africa. With COVID-19, countries such as the US, Canada, Germany and France have issued additional calls for foreign medical professionals, especially those working on COVID-19 issues.

According to the 2022 IIAG, *Control of Non-Communicable Diseases* and *Access to Healthcare* have deteriorated since 2012

Africa accounts for 25% of global vaccine demand, but less than 1% of supply

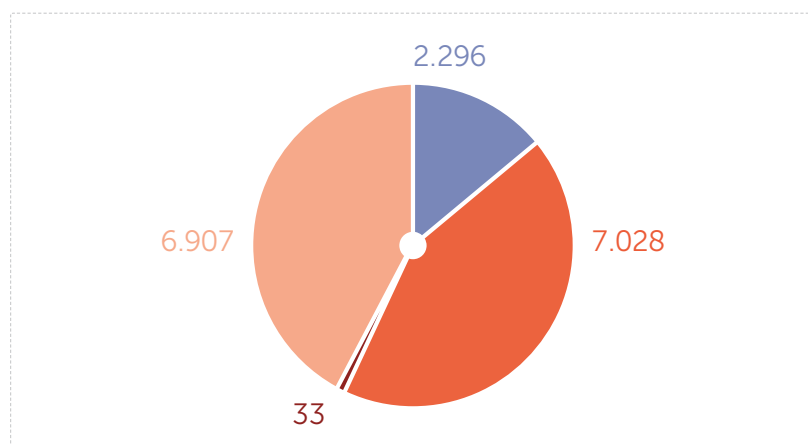
African public health expenditures remain far below the 2001 Abuja pledge

### Almost half of global health ODA goes to Africa

In 2021, the health sector received one fifth of total ODA to Africa. Almost half (45.2%) of global health ODA went to Africa, totalling \$16.3 billion.

Most health ODA in Africa goes to Basic Health and Population Policies & Programmes (over 40% for each one).

## Africa: total Health ODA (2021)



## Health type

- Health Policy, General (\$ million)
- Basic Health (\$ million)
- Non Communicable Diseases (\$ million)
- Population policies & Programmes (\$ million)

Source: MIF based on OECD

## Top 10 Health ODA recipients in Africa

	Health ODA in \$ million (2021)
Nigeria	1242.3
South Africa	928.8
DR Congo	902.6
Tanzania	877.3
Mozambique	868.9
Uganda	867.3
Kenya	831.8
Ethiopia	727.7
Zambia	617.2
Zimbabwe	555.1

Nigeria, South Africa and DR Congo were the top 3 health ODA recipients in Africa in 2021 – receiving 18.9% of the total health ODA to the continent

Source: MIF based on OECD

## Top 10 Health ODA donors to Africa

	Health ODA in \$ million (2021)
United States	5133.8
Global Fund	3879.0
IDA	1492.6
GAVI	861.5
Canada	817.2
EU Institutions	529.1
United Kingdom	503.0
Germany	485.9
France	386.6
Japan	247.4

3 multilateral donors – the Global Fund, IDA and GAVI – provided almost 40% of total health ODA to Africa

● Multilateral funds

Source: MIF based on OECD

### Aid crowding-out effect: 9 out of the top 10 health ODA recipients in Africa spend less than 10% of their budget on health

Among the top ten health ODA recipients in Africa in 2021, nine spent less than 10% of their public expenditure on health in 2019, the latest available data year.

Four of those countries even spent less than 5% of their public expenditure on health: Ethiopia (4.8%), DR Congo (4.4%), Nigeria (3.8%) and Uganda (3.1%).

Top 10 Health ODA recipients in Africa	Health ODA in \$ million (2021)	Government health expenditure as % of general government expenditure (2019)
Nigeria	1242.3	3.8
South Africa	928.8	15.3
DR Congo	902.6	4.4
Tanzania	877.3	9.6
Mozambique	868.9	5.6
Uganda	867.3	3.1
Kenya	831.8	8.3
Ethiopia	727.7	4.8
Zambia	617.2	7.0
Zimbabwe	555.1	8.7

In 2019, out-of-pocket health expenditure in sub-Saharan Africa amounted to 30.0% of the Current Health Expenditure (CHE), compared to a global average of 18.0%

#### China's health support boosted by COVID-19

- 345 health aid projects were financed by China in Africa between 2006 and 2013, accounting for a total amount in 2014 of \$764 million, an annual average of \$95.5 million per year.
- The COVID-19 pandemic has boosted China-Africa health cooperation: vaccine donations, vaccine manufacturing by Chinese companies in countries such as Algeria, Egypt, Morocco and South Africa, construction of Africa Centres for Disease Control and Prevention (AfCDC) headquarters in Addis Ababa, etc.

#### Non-state actors have a prominent role in health in Africa

Since 2000, the **Bill & Melinda Gates Foundation (BMGF)** has dedicated \$65 billion dollars to global health, accounting for over 80% of all private sector contributions to the Global Fund in 2019. It operates across 49 African countries, and includes Africa CDC, the AU, the SADC, ECOWAS, the EAC, Amref, the WHO and UNICEF. To date, more than 5,000 grants worth over \$8 billion dollars have also been allocated to Africa, and \$7 billion have been allocated in 2022-2026 for Africa.

The **Aga Khan Foundation (AKF)**, the **Aga Khan Health Services (AKHS)** and the **Aga Khan University (AKU)'s Faculty of Health Sciences** focus on health service delivery, professional training, community health programmes and population research in East Africa. AKHS operates facilities in Kenya and Tanzania covering over a million patients per year.

**Amref Health Africa**, with almost 60 years of experience in health development, is the largest health NGO on the continent and has a multidisciplinary workforce. 97% of its 500 staff is African and Amref has a strong regional presence, working with over 100 poor and marginalised communities, local and national authorities in Ethiopia, Kenya, Rwanda, Somalia, South Africa, Sudan, Tanzania and Uganda.

Since 2021, the **Mastercard Foundation's Saving Lives and Livelihoods**, a \$1.5 billion initiative with Africa CDC, aims to vaccinate at least 65 million people in Africa, develop a workforce for vaccine manufacturing, and strengthen Africa CDC's capacity.

Gates Foundation: \$7 billion allocated to Africa over 2022-2026

## Education: key to leverage the demographic dividend

### Education in Africa

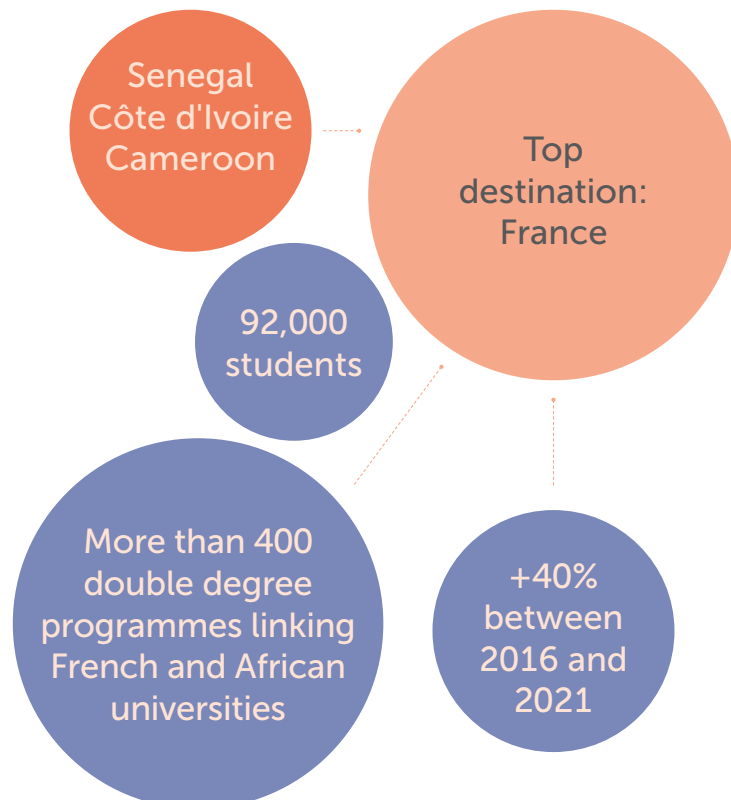
According to the latest IIAG, *Education* is the seventh highest scoring out of the IIAG's 16 sub-categories in 2021 and the fifth most improved over the decade 2012-2021. Since 2012, *Human Resources in Education*, *Education Completion*, *Education Enrolment* and *Equality in Education* improved, however, concerningly, *Education Quality* has deteriorated.

In sub-Saharan Africa over one-fifth of primary-age children are out of school, and almost 60% of youth between the ages of 15 and 17.

In a dozen sub-Saharan African countries, including Kenya and Nigeria, school fees are the most reported financial worry.

Across Africa, 21% of enrolled students attend a private school, and that share is much higher in certain economies. Even in countries like Uganda, which offers free primary education, parents still have ancillary school expenses for uniforms, exam fees, school upkeep, books or hiring an extra teacher.

Students from sub-Saharan Africa are particularly mobile: 4.8% of them study abroad, compared to 2.7% on average worldwide. As of 2022, sub-Saharan Africa has 430,000 students of all degree-seeking studies abroad (7% of the world's total). The main destinations for African students abroad are the EU (27%), sub-Saharan Africa (20%) and North America (15%).



Source: MIF based on Campus France

60% of youth aged 15-17 are out of school in sub-Saharan Africa

Across Africa, 21% of enrolled students attend a private school

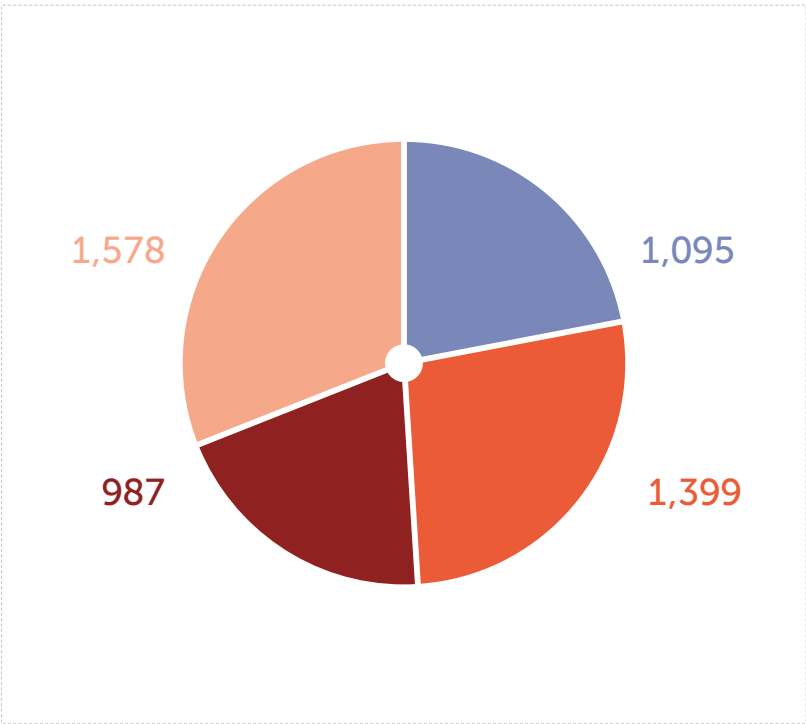


**ODA mostly supports post-secondary education in Africa**

In 2021, the education sector received 6.0% of total ODA to Africa. Almost 33.6% of global education ODA went to Africa, totalling \$5.1 billion.

Most education ODA in Africa went to Post-secondary Education (31.2%), followed by Basic Education (27.7%).

**Africa: total Education ODA (2021)**



Just three countries - Morocco, Nigeria and Egypt - receive 21% of total education ODA to Africa

IDA, France, and Germany alone provided 54% of total education ODA to Africa

- Education type
- Education policy/training (\$ million)
  - Basic Education (\$ million)
  - Secondary Education (\$ million)
  - Post-secondary Education (\$ million)

Source: MIF based on OECD

**Increased focus on scholarships and trainings**

**Germany**

Germany's Skills Initiative for Africa (SIFA) with NEPAD and the African Union supports vocational training and employment for young people. The African-German Youth Initiative supports exchange among African and German pupils, students and young workers. Germany also supports the Pan-African University (PAU) and the Institute of Water and Energy Sciences.

**China**

In 2020, China offered more scholarships to African nationals than the leading Western governments combined. The number of African students in China increased from about 40,000 to 60,000 between 2016 and 2018. The 2021 FOCAC aimed to deepen cooperation in capacity building, technology transfer and technical training for youth. The Luban Workshops for capacity building are underway in 12 African countries with a focus on vocational education for high-level technologies. Chinese has been introduced into national curricula in several African countries, and China also plans to promote the teaching of African languages in China.

**In 2020, China offered more scholarships to young Africans than the leading Western countries combined**

### Turkey

Through the state-run Maarif Foundation, Turkey runs 175 schools in 26 African countries. Approximately 15,000 African students have obtained full scholarships from the Turkish state since 1992: 5,259 between 2010 and 2019, while 1,147 African students received scholarships in 2019 alone. Turkey's Yunus Emre Institute (YEE) has ten cultural centres on the continent offering language training courses and cultural exchange programmes.

### Russia

As of 2019, at least 17,000 African students were enrolled in Russian universities. Rosatom, for instance, funds science, technology, engineering, and mathematics-education programmes as well as scholarships to study in Russia. Angola, for instance, plans to send 300 master's level students to Russia annually. The Central African Republic announced in 2022 that learning Russian will become compulsory for university students, while the language has been taught in schools since 2019.

### Japan

Between 1999 and 2008, the Japan International Cooperation Agency's (JICA) education projects in Africa covered 16.1 million children as a result of construction of schools, teacher trainings and school management reforms. JICA provides advice and technical assistance to governments and The School for All project involves local communities in education. The first Africa-Japan Higher Education Partnership Workshop in 2018 gathered 25 African academic leaders. The Africa Center of Excellence (ACE) and the Partnership for Skills in Applied Sciences, Engineering and Technology (PASET) facilitate collaboration amongst Japan, universities and companies, and African higher education institutions.

### Mastercard Foundation

The Mastercard Foundation (MF) is the largest private funder of education in developing countries, with approximately \$35 billion in assets and more than \$8.6 billion spent in 74 countries since 2006, primarily in Africa. Its 2018 Young Africa Works strategy aims to enable 30 million young Africans to access dignified and fulfilling work by 2030, 70% of whom are women. The Scholars Program has grown into a \$1.8 billion network aiming to have 100,000 scholars by 2030.

Since 1992, about 15,000 African students have been awarded full scholarships from the Turkish government

As of 2019, at least 17,000 African students were enrolled in Russian universities

Mastercard Foundation: \$8.6 billion spent since 2006, primarily in Africa

### Rockefeller Foundation

The Rockefeller Foundation aims to advance new frontiers of science, data, policy and innovation to solve global challenges related to health, food, power and economic mobility.

Since the establishment of the Rockefeller Foundation's Africa Regional Office in 1966, the Foundation has forged strong ties with African governments, academic institutions and pan-African entities.

The Foundation has supported capacity and institution building on the continent through a post-doctoral fellows program (RockyDocs) and seeding of regional entities including African Risk Capacity (ARC) and the Alliance for a Green Revolution in Africa (AGRA).

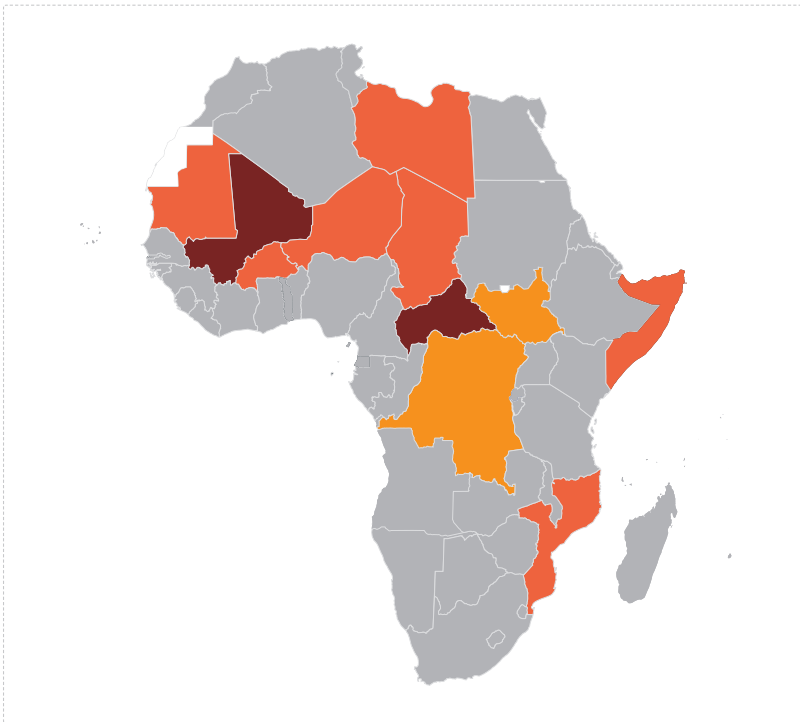
### The World Bank's Human Capital Project (HCP)

Over 40% of the World Bank's total human development portfolio is focused on Africa. In 2022, nine out of ten World Bank development policy operations in Africa supported reforms that bolster human capital. As of 2022, \$8.2 billion was allocated for financing human capital projects Africa, with a total of 79 new projects.

**Multilateral support: Africa is the main recipient of UN and EU active missions**

Africa is the main destination for both EU and peacekeeping missions. Of the 12 currently active UN Peacekeeping operations, six are in Africa.

African countries: active UN & EU missions (2023)

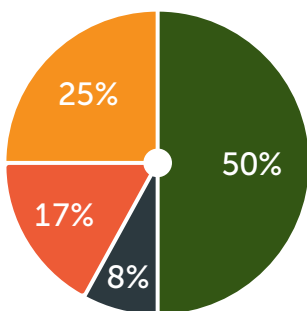


6 of the 12 active UN Peacekeeping Missions (UNPKM) are in Africa, comprising over 73,000 personnel. All have been ongoing for about 10 years or more

- EU
- UN & EU
- UN
- No missions

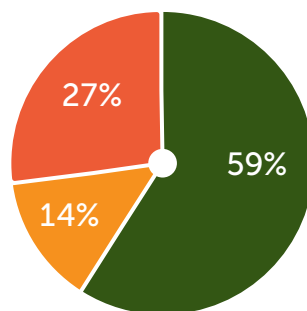
Source: MIF based on UNMISS and EEAS

World regions: current UN peacekeeping operations (2023)



Source: MIF based on UNMISS

World regions: current EEAS operations (2022)



Source: MIF based on EEAS

World region ● Africa ● Asia ● Europe ● Middle East

The largest UNPKM in Africa is the MONUSCO in DR Congo, with over 18,000 personnel.

The oldest UNPKM in Africa at 22 years is MINURSO in Western Sahara.

**Remaining in Mali?: MINUSMA's challenges**

Faced with growing difficulties with the ruling junta in Mali, the UN is currently drawing conditions for its mission in Mali to remain. These include respecting the timetable for the transition back to democratic rule, respecting MINUSMA mandate on human rights, respecting MINUSMA freedom of movement.

## SPOTLIGHT

### EU cooperation for Peace and Security



**A renewed and enhanced cooperation for peace and security.**

Facing growing common security challenges, we announce a renewed and enhanced peace and security cooperation. The two continents have a long-standing cooperation premised on the principle of African solutions to African problems, within the framework of the African Peace and Security Architecture (APSA) and reflected in the AU-EU Memorandum of Understanding on Peace, Security and Governance (2018), designed to combat instability, radicalisation, violent extremism, and terrorism, tackling the root causes of conflicts, and addressing the entire conflict cycle through the integrated approach. We express our commitment to foster our cooperation through support for adequate training, capacity building and equipment, to strengthen and scale up autonomous peace operations of African defence and security forces, including through EU missions and assistance measures, as well as support for law-enforcement capacity-building. Together, we will also continue to support African-led Peace Support Operations and the on-going discussions on the use of UN-assessed contributions for operations authorised by the UN Security Council.... We will intensify our cooperation on security, including on cybersecurity. We will join efforts to further promote the rule of law and the implementation of the Women, Peace and Security, Children and Armed Conflict and the Youth, Peace and Security Agendas, and underpin it with concrete actions to achieve durable peace.

**6<sup>th</sup> AU/EU Summit Final Declaration (February 2022)**

#### **Crowding-out effect**

Almost all the funds disbursed from the EU's new European Peace Facility, which replaced the previous African Peace Facility, have been redirected to buying weapons for Ukraine. The EPF has allocated €3.6 billion for Kyiv out of the total €5 billion earmarked in the 2021-2027 Multilateral Financial Framework. By comparison, it allocated €600 million to the AU for peace support operations 2022-2024.

#### **13 EU civilian and military missions are currently operational in Africa:**

- EUTM-S - Training Mission in Somalia.
- EUTM RCA - Training Mission in Central African Republic
- EUTM Mozambique - Training Mission in Mozambique
- EU RACC Sahel - EU Naval Force Operation ATALANTA
- EUCAP Somalia - Capacity Building Mission in Somalia
- EUCAP Sahel Niger
- EUCAP Sahel Mali
- EUBAM Border Assistance Mission in Libya
- EUAM RCA Advisory Mission in the Central African Republic
- IRINI (EUNAVFOR MED) Mission to Monitor Libya's UN arms embargo
- EUTM Mali - Training Mission in Mali
- EUMPM Niger
- EUNAVFOR Somalia

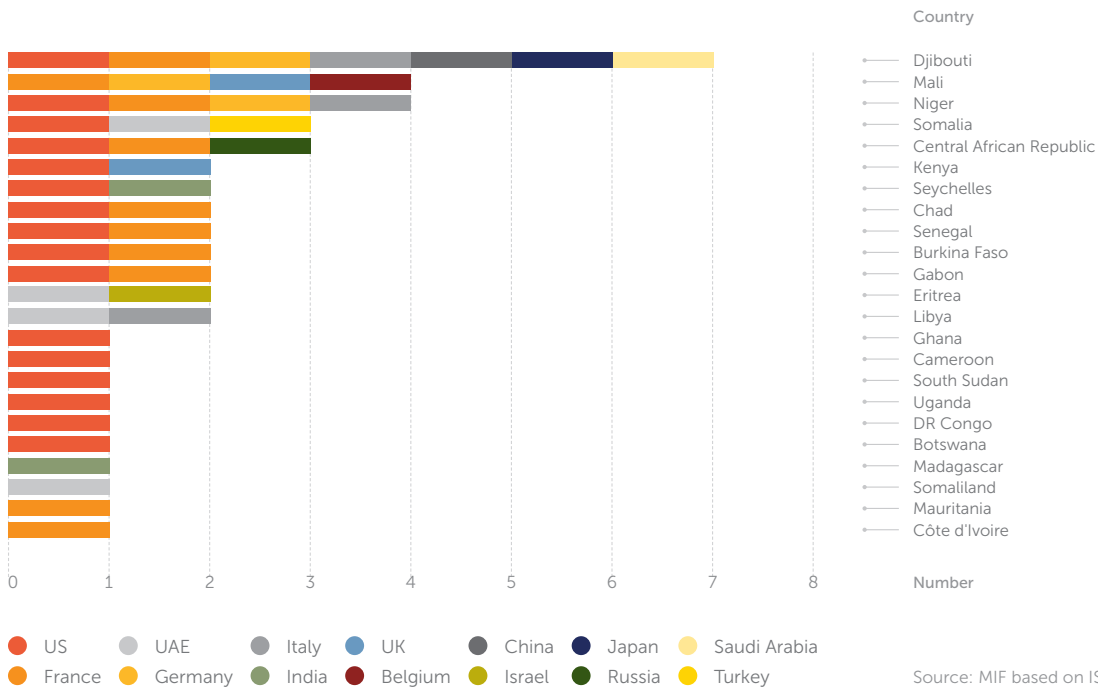
### A strategic foothold: 14 non-African states have established a military presence on the African continent

- 23 out of 54 African countries are currently host to at least one non-African military presence.
- The US has the largest number of military presences (16) followed by France (11), Germany, Italy and the UAE (3 each).
- France has held military bases in Africa since 1960, the US since 2003 and China since 2017.
- New actors have emerged, with Turkey, Israel and Saudi Arabia all establishing a presence over the last ten years.
- Djibouti, overlooking the Horn of Africa, hosts the highest number of non-African military bases (7): China, France, Japan, US, Germany, Italy and Saudi Arabia.

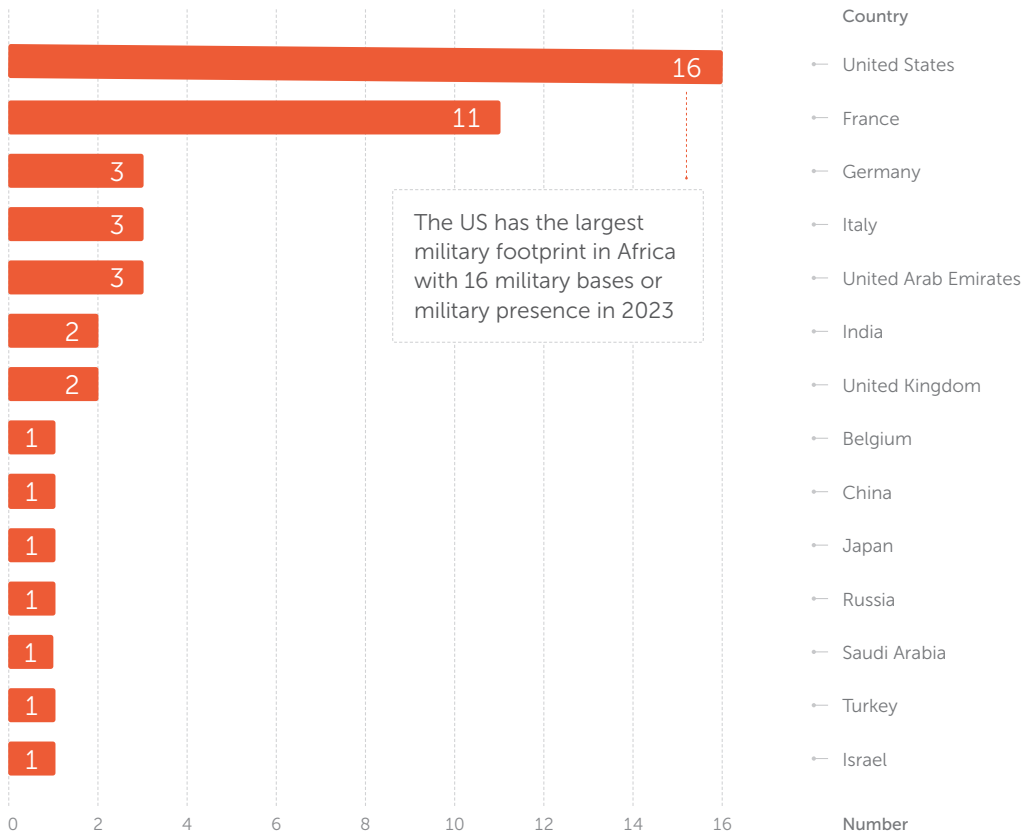
Turkey is present in Somalia. Israel is present in Eritrea. Saudi Arabia is present in Djibouti

Djibouti, with its strategically important location, hosts 7 non-African military bases

African countries: foreign military base or military presence (2023)



### Non-African countries: military base or military presence in Africa (2023)



Source: MIF Based on ISS

#### France reduces its historical military presence in Africa

Following the end of Operation Barkhane in November 2022, President Macron announced in March 2023 that France would continue to further reduce its military presence on the continent.

Starting originally in August 2014 to fight jihadist armed groups in the Sahel, Operation Barkhane, which represented approximately 3,000 French troops on African soil, officially finished in November 2022, following the coup in Mali. Led in cooperation with Burkina Faso, Chad, Mali, Mauritania, and Niger (G5 Sahel), it was later joined, to a small extent, by the UK (2016), Estonia (2018), and Sweden (2021).

Parallel to the withdrawal of Operation Barkhane forces, France's current permanent military presence in Côte d'Ivoire, Gabon and Senegal will be reduced from its current levels of over 3,000. The bases will be "africanised" and become "academies" co-run by African and French armies. Only the French military base in Djibouti will remain in its current form (around 1,450 personnel).


While the number of French soldiers present on the continent will continue to decrease, there will be increased focus on training and equipment.

In early 2023, Russia announced the opening of a naval base in Sudan on the Red Sea

In 2023, China is looking at opening an additional base in Equatorial Guinea

### China's military expansion in Africa

- China is the second largest contributor to the UN Peacekeeping budget (18.68%), and there are currently 2,464 Chinese Blue Helmets operating on the African continent.
- For 2023, China is looking at opening an additional base in Bata, Equatorial Guinea.
- *"To think that China, which talks about where it wants to be militarily in 2050, would be content with bases in Cambodia and Djibouti is short-sighted"*  
E.A. Miller, US Africom's Director of Intelligence analysis (Foreign Affairs, August 2022).



Almost 2,500 Chinese Blue Helmets are operating in Africa

### US - *"Advance US national interests and promote regional security, stability and prosperity"*

- The US currently has the largest military presence on the continent, with at least 16 significant presences across Africa. A significant portion of the US presence is also suspected of being maintained in secret military bases or outposts, meaning the true number is likely higher.
- 6,000 or more US personnel are rotationally deployed in Africa, out of which 1,200 are in West Africa, with a significant percentage in Niger, which has become the key American hub in the region. Around 500 Special Operations forces are reportedly deployed in Somalia.
- Headquartered in Stuttgart, United States Africa Command (AFRICOM) was created in 2008. *"With partners, Africom counters transnational threats and malign actors, strengthens security forces, and responds to crises, in order to advance US national interests and promote regional security, stability and prosperity"*.



Over 6,000 verifiable US troops are operating across Africa

In March 2023, 29 African countries, involving 1300 personnel, took part in the US annual military training exercise with West African armies.

### Emerging actors:

#### India

- 4,576 Indian Blue Helmets are currently present within UNPKMs on the African continent (MONUSCO, UNMISS and UNISFA).
- India plans to establish 32 coastal radar surveillance stations around Seychelles and Mauritius to monitor activity in the Indian Ocean.
- India held its 2nd AFINDEX (Africa-India Field Training Exercise) on 21-29 March 2023 – 22 African countries participated, including 10 at Army Chief level: Congo Republic, Gambia, Kenya, Malawi, Niger, Seychelles, Tanzania, Uganda, Zambia, Zimbabwe.

#### Turkey

- After participating in NATO's Combined Task Force for anti-piracy operations in 2009, Turkey has expanded its operations on the continent.
- Turkey opened its largest military base in Mogadishu in 2017.
- 30 African states have now signed different types of security-related agreements with Turkey, most of them in 2017. As of 2022, there are Turkish military attachés in 19 African countries.
- According to figures from the Turkish Exporters Assembly, Turkey's defence and aerospace exports have increased more than five-fold between 2020 and 2021 (to reach \$460.6 million).

#### The UAE

- The UAE opened its first African military base in Eritrea in 2015, with airfield and deepwater port facilities that have been used to support the UAE's role in the Yemen conflict. However, in February 2021, under pressure from the US, it dismantled parts of the Assab military base.
- It has also established a presence in Somalia, Somaliland, Puntland and Socotra.

### Diversifying partners: Tanzania's example

Under President Suluhu Hassan, Tanzania, which is a long-standing partner of China on military training and arms procurement, is looking to diversify its security partners: the UAE for transfers of military technology, the UAE and Israel for speed and patrol boats and India at a more general level.

### Drone diplomacy

- Turkey has sold drones to Burkina Faso, Djibouti, Ethiopia, Libya, Mali, Niger and Togo.
- Iran has sold drones to Ethiopia, and is in talks with Algeria.
- Chinese drones are favoured by African governments, namely Ethiopia, Egypt, Morocco, Nigeria, and very recently DR Congo.

### Humanitarian Aid

**France's** Committee for International Cooperation and Development (CICID) in 2018 decided to increase the total annual (bilateral and multilateral) funding for emergency humanitarian action and post-crisis stabilization to **€500 million** by 2022.

**Japan** – pledged **\$30 billion** in African aid at the Tunis Summit in 2022

**US** – announced in December 2022 to provide an additional **\$2 billion** in humanitarian assistance for life saving assistance to support crisis affected people in Africa. In the fiscal year 2022 alone, USAID provided more than **\$6 billion** in humanitarian assistance to Africa.

In 2023, the US announced a **\$150 million** in new humanitarian assistance for the Sahel region as well West and Central Africa. As of March 2023, The US has provided **\$233 million** in the FY 2023.

**United Arab Emirates** – announced in 2022, a contribution of **\$85 million** to address humanitarian situation in Horn of Africa

**UK** – committed to spend **£156 million** in humanitarian aid to Eastern Africa in the financial year 2022-2023.

**EU Commission** – allocated **€181.5 million** for humanitarian aid in 2023 to Western and Central Africa, this is in addition to the **€102.5 million** in humanitarian funding for Africa's Lake Chad region.

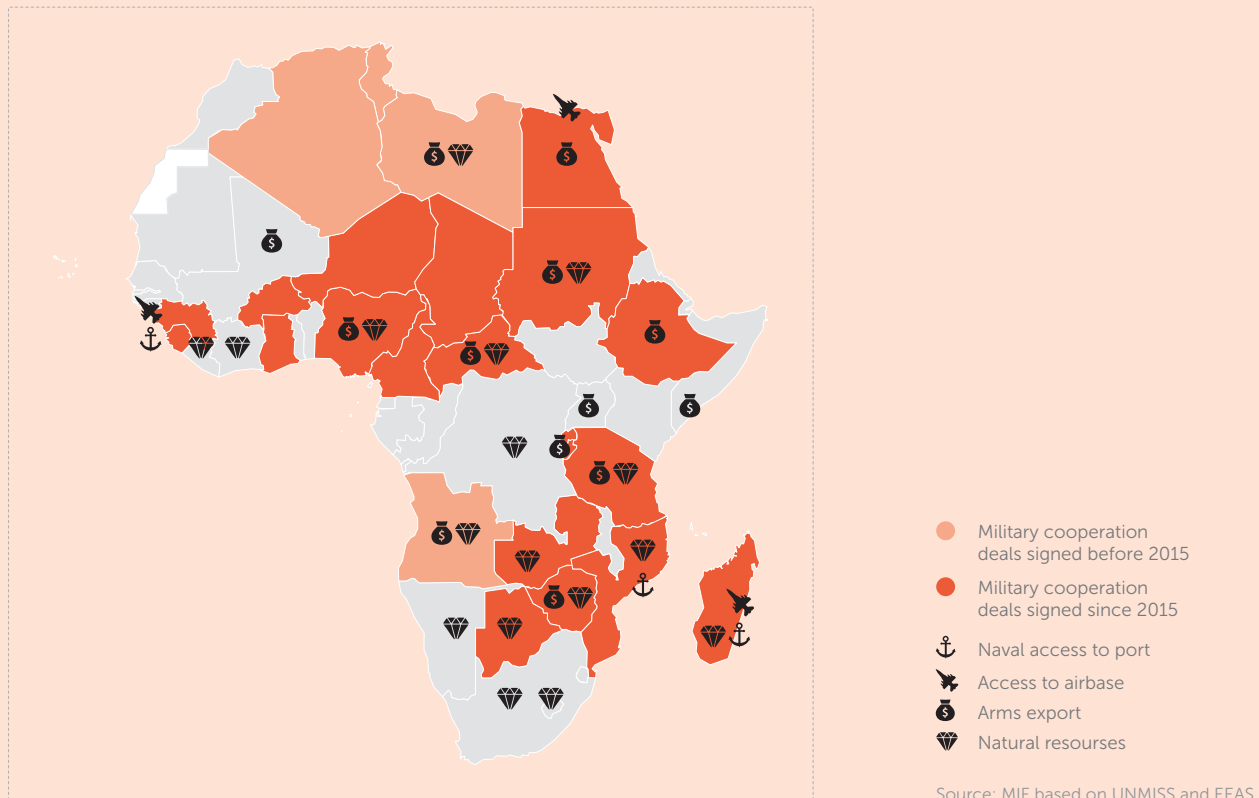


## SPOTLIGHT

### Russia's armed footprint in Africa

- 1 Formal military-technical agreements:** Russia has already concluded bilateral military cooperation agreements with over 20 African countries, the majority of which were signed after 2015, encompassing cooperation in the form of arms, ammunition, technology supply and military training.
- 2 Private military contracts - Wagner Group:** a private military company with nebulous connections to the Russian government, known for its often-illicit activity and for its frequent implication in human rights abuse allegations. The Wagner Group often supports Russian disinformation campaigns and provides military assistance to unstable governments in exchange for preferential access to resources.

African countries: strategic interests and military cooperation deals signed with Russia (2006-2022)



## Wagner Group's existing military cooperation agreements in Africa

2017

**Sudan:** Wagner Group provided security and logistical support to protect former president Omar al-Bashir. In exchange, Russian-owned businesses secured gold mining concessions.

**Central African Republic:** Wagner began supporting the government's battle against rebel groups in 2017. In exchange, Russian advisers gained the state's ear on political and economic matters.

2019

**Mozambique:** Wagner Group supported government forces fighting jihadists in the north. A month before Wagner's deployment in September 2019, Mozambique signed agreements on mineral resources, energy (particularly gas) and defence with Russia.

**Libya:** September 2019 - Wagner Group joined combat operations in Tripoli and currently has around 2,000 troops stationed.

**Madagascar:** Wagner Group was present in Madagascar during the 2019 presidential election, running campaigns initially in favour of the incumbent and then eventually supporting the winner Andry Rajoelina.

2021

**Mali:** Late 2021 - Malian government contracted Wagner Group to fight extremism in the Sahel, confirmed by Sergei Lavrov.

**Mozambique:** Wagner exited and was replaced by Dyck Advisory (a South African private military company), who are also accused of human rights abuses.

2022

**Mali:** April 2022 - UN experts called for investigations into Wagner Group's role in the massacre of approximately 203 civilians in the town of Moura, Mopti region between 27-31 March 2022.

**Mali:** November 2022 - French Forces exited.

3

### Russia's 2023 projects:

**Sudan:** Construction of a Naval Base – The Russian and Sudanese governments reached an agreement in February 2023: a 25 year-long deal, to be extended every 10 years. It will provide a base for 300 soldiers and four navy ships, including nuclear powered ones.

**Niger:** Indications of expansions into Niger on Wagner's Telegram channel. This could take the form of acquiring contractual access to Uranium mines in Arlit and Akokan, both located in the Arlit department of the Agadez region, as well as newly discovered gold deposits in northern Arlit.

Anti-French sentiment in Western Africa has been attributed to a sustained effort by the Wagner group to reduce Western influence, whip up opposition to France's diplomatic and military involvement and strengthen Russia's hand in the region

### Democracy trends in Africa

Democracy is backsliding at global level, and rapidly in Africa since 2018 which is a cause for concern.

- According to a V-DEM 2023 Democracy Report, the level of democracy enjoyed by the average global citizen in 2022 has fallen back to 1986 levels. Almost three quarters of the world's population (72%) live under an autocratic regime in 2022.
- According to the latest IIAG (2022), the indicator *Democratic Elections* has deteriorated rapidly from a peak score of 44.0 in 2018 to a decade-low score of 38.1 in 2021.
- Of the 16 coups recorded globally since 2017, all but one (Mynanmar) have occurred in Africa.

Democracy remains the best system for the majority of people in Africa.

- According to separate surveys conducted by Afrobarometer and the Ichikowitz Foundation, 69% of Africa's citizens still prefer democracy to any other kind of governance, while 74% of Africa's youth believe that democracy remains preferable to any other kind of government.
- Political engagement among young people is on the rise, with 18% considering running for some political office.



**Of the 16 coups recorded globally since 2017, all but 1 have occurred in Africa**

### African ownership


**The AU's African Charter on Democracy, Elections and Governance (ACDEG):** adopted in 2007 and entered in force in 2012, it has been signed by 46 countries and ratified by 38.

- **Countries that have neither signed nor ratified:** Botswana, Egypt, Eritrea, Libya, Morocco and Tanzania.
- **Countries that have signed but not yet ratified:** Burundi, Cabo Verde, Congo Republic, DR Congo, Gabon, Mauritius, Senegal, Somalia, Eswatini, Tunisia and Uganda.
- **Countries that have ratified without signing:** Cameroon, Mali and Seychelles.

**The AU's African Governance Architecture:** showcases the AU's determination "to promote and protect human and people's rights, consolidate democratic institutions and culture and ensure good governance and the rule of law". Its main objective is the implementation of the AU's shared values and in particular the ACDEG.

**The Charter Project Africa** is a three-year pan-African initiative launched in 2021 supporting civil society to promote the ACDEG. This project is led by six organisations: AfricTivistes, Code for Africa, The Democracy Works Foundation, The Gorée Institute, The European Partnership for Democracy and the European Union.

AU Electoral Observation and Monitoring Missions – the AU uses specific instruments such as the guidelines for African Union Electoral Observation and Monitoring Missions (2002) and the OAU/AU Declaration on Principles Governing Democratic Elections in Africa (2002).



**Out of the 2,000 observers accredited at the 2022 elections in Angola, 49 were from 25 AU member states and sent by the African Union**

## African Union on coups

The founding AU treaty authorises the Union intervention in a member state in response to grave violations of human rights, and reaffirms its opposition to “unconstitutional government change”, defined by either a military coup d'état, an intervention by mercenaries, a seizure of power by armed dissident groups and rebel movements or a refusal by an incumbent government to relinquish power after free, fair and regular elections.

## Countries suspended by the AU due to unconstitutional government change



### AU's challenges:

- A key challenge for the AU is how to react to unconstitutional government change through popular discontent and mass uprisings.
- The border between what is considered democratic and non-democratic is blurred and makes it difficult for the AU to comment and adapt its policy.
- AU also struggles with leaders who want to extend their terms through circumventing or removing their term limits.

**11** countries have been suspended from the AU since 2003, some of them more than once, following an “unconstitutional government change”

## Western focus on democracy, human rights and the rule of law

### EU

European countries and the European Union have promoted democracy in Africa for decades since independence through various initiatives, programmes and agreements.

### The 2000 Cotonou Agreement (for sub-Saharan Africa), and Association Agreements (Northern Africa): democracy and human rights clauses

Replacing the 1975 Lomé Convention, the 2000 Cotonou Agreement covered relationships between the EU and sub-Saharan Africa/Caribbean/Pacific countries for 20 years and was based on three pillars: development cooperation, economic and trade partnerships and a political dimension.

The Cotonou Agreement contained a democracy clause setting out that democracy, human rights and rule of law are essential elements of the agreement. In the case of a violation, there was the potential for one party to take appropriate measures against the non-compliant party.

**For 20 years (2000-2020), the Cotonou Agreement was a key tool used by the EU in promoting democracy in Africa**

Democracy & Human Rights clauses	African Country	Legal basis
Art. 9:2 Respect for human rights, democratic principles and the rule of law, underpins the ACP-EU Partnership.	48 sub-Saharan African countries	2000 Cotonou Agreement
Art. 2: Respect for the democratic principles and fundamental human rights established by the Universal Declaration of Human Rights shall inspire the domestic and international policies of the Parties and shall constitute " <i>an essential element</i> " of this Agreement. Or Art. 2: Relations between the Parties, as well as all the provisions of the Agreement itself, shall be " <i>based on</i> " respect of democratic principles and fundamental human rights as set out in the Universal Declaration on Human Rights, which guides their internal and international policy and constitutes " <i>an essential element</i> " of this Agreement.	Algeria	2006 Association Agreement
	Egypt	2004 Association Agreement
	Morocco	2000 Association Agreement
	Tunisia	1998 Association Agreement
All beneficiary countries " <i>have to comply</i> " with the principles laid down in core human rights and labour rights conventions including the International Covenant on Civil and Political Rights.	Beneficiary countries of EU trade preferences (the vast majority of African countries)	GSP Regulation (EU) No 978/2012

Source: MIF based on EU

### Post-Cotonou

Initially expected to expire in 2020, the Cotonou agreement was extended to November 2021 due to ongoing negotiations.

In 2021 the EU and the African, Caribbean and Pacific Group of States reached a new agreement to replace the Cotonou agreement. The post-Cotonou deal includes wider policy areas including migration issues, human rights and climate protection.

Despite the agreement being finalised by negotiators, it is yet to be signed due to a lack of unanimity on the part of the EU.

## The Neighbourhood, Development and International Cooperation Instrument (NDICI) – Global Europe

Launched on 14 June 2021, the NDICI now represents the EU's external action main financing instrument.

Two out of their four thematic components cover Human Rights, Democracy, and Civil Society Organisations. Within the Human Rights and Democracy component, there are five overarching priorities:

1. Protecting and empowering individuals;
2. Building resilient, inclusive and democratic societies;
3. Promoting a global system for human rights and Democracy;
4. Harnessing the opportunities and addressing challenges of new technologies;
5. Delivering by working together

### Global Europe Human Rights and Democracy programme: €1.5 billion 2021-2027

Priority	Amount (MEUR)
1 Protecting and empowering individuals	703.7
2 Building resilient, inclusive and democratic societies	462.9
3 Promoting a global system for human rights and democracy	143.6
4 Safeguarding fundamental freedoms, including harnessing the opportunities and addressing challenges of digital and other new technologies	195.0
5 Delivering by working together	6.6

Of the €1.5 billion under the Global Europe Human Rights and Democracy programme, around €750 million will be dedicated to country allocations

Eastern, Central, and Western African countries get the largest financial allocations with over €170 million

#### African elections are the most observed by the EU Election observers

Through its Election Observation Missions, the EU monitors and reports on the quality and legitimacy of elections globally.

- Between 2000 and 2022, the EU has sent election observation missions for 45 presidential elections and 45 parliamentary elections in Africa, the most of any world region.
- In the same period, Asia and the Pacific has only had seven presidential and 16 parliamentary elections observed.

Since 2000, the EU has deployed a total of 90 presidential or parliamentary Election Observation Missions to Africa.

**US**

Countries in sub-Saharan Africa that are eligible for the African Growth and Opportunity Act (AGOA) have duty-free access to the US market for over 1800 products. As of 2022, 36 countries in sub-Saharan Africa are eligible for AGOA benefits.

The Millennium Challenge Corporation (MCC) is a US foreign assistance agency that partners with developing countries who are "committed to good governance, and investing in their citizens and economic freedom".

MCC's Board examines a country's performance on 20 independent and transparent policy indicators.



**Eligibility for AGOA requires: a market-based economy, the rule of law, political pluralism and the right to due process**

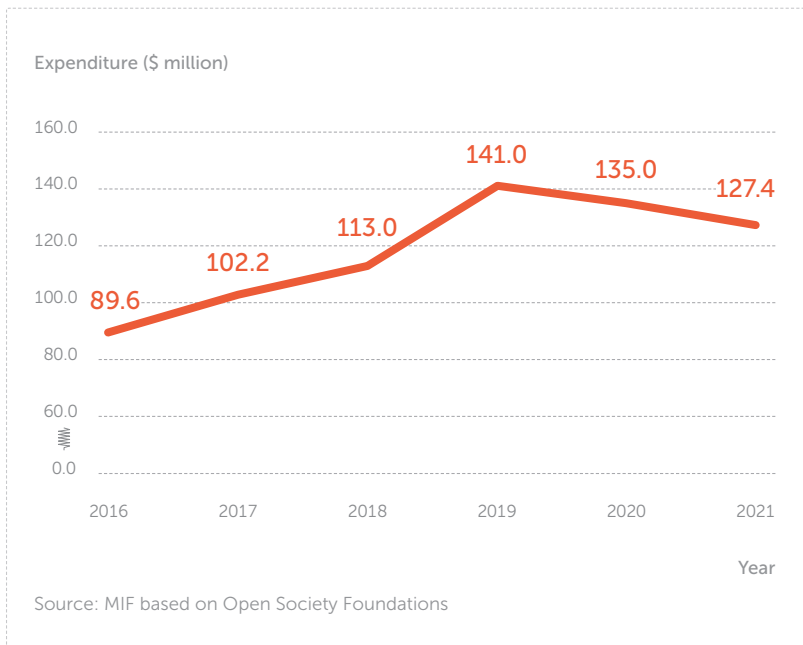
**Non-state actors**

The Open Society Foundations (OSF) - OSF is the world's largest private funded organisation focusing on justice, democratic governance and human rights.



**The 2022 US-Africa Summit: \$165 million to support good governance and elections in Africa in 2023**

**Africa: Open Society Foundations expenditure (2016-2021)**



**Open Society Foundations has spent \$708.2 million in Africa between 2016 and 2021**

**The Carter Center** - Founded by former US President Jimmy Carter and his wife Rosalynn, the Center seeks to "prevent and resolve conflicts, enhance freedom and democracy and improve health". Through their democracy programme they work globally to support impartial and credible elections. Since 1989, the Carter Center has observed 114 elections in Africa, Latin America and Asia.

**Kofi Annan Foundation** - "Supporting elections and democracy" is one of the "core areas of work" of the Kofi Annan Foundation, with two main initiatives.

- The Electoral Integrity Initiative, launched in 2013, focusing on "unaddressed political challenges that undermine elections".
- The Kofi Annan Commission on Elections and Democracy in the Digital Age convened in 2018 with the support of Stanford University and provides consultations and recommendations on leveraging technology to improve the integrity of elections.

**The Ford Foundation** - Funds a wide range of programmes globally, with a focus on social justice, through nine pillars, including Civic Engagement and Government and Gender, Racial and Ethnic Justice. In Eastern Africa, the programmes are related to civil engagement and government. In West and Southern Africa, the main programmes include gender, racial and ethnic justice.



**Ford Foundation's global budget for civil engagement and government programmes: \$31 million with a total of 205 grantees**

#### **Identity and biometry: World Bank's ID4D Initiative**

Instituted in 2014, the World Bank Group's Identification for Development (ID4D) Initiative recognises the enabling and transformational role of identification systems in achieving several of the SDGs and advancing progress in many areas such as social protection, women and girls empowerment, financial inclusion, governance, healthcare, digital development and humanitarian response.


According to the 2021 ID4D Global Estimates Report, of the world's estimated 843 million people without ID in 2021, 56% (471.9 million) were in sub-Saharan Africa.

As evidenced by an investment case commissioned by the Global Partnership for Sustainable Development Data, investments in strengthening data systems can offer a rate of return of \$32 of economic benefits for \$1 invested.

- 28 African countries have World Bank financing operations approved or under preparation to improve the ID or Civil Registration systems.

With over half of the world's unregistered population in Africa, there is a market worth €1.4 billion for biometric and digital identity technology.

- The boom is being driven by African governments, civil society as well as organisations such as ECOWAS, encouraging African countries to modernise civil society registration services. However, the main companies operating in Africa are European, including Semlex (Belgian), Veridos (Germany) and Idemia (France).



**1.1 billion people globally are unable to prove their identity. 1/2 of them are in Africa**



## Alternative choices: new 'model' competition?

In recent years, African countries have diversified their political and economic engagement with countries across the globe, and western partners' ability to impose political conditionalities has waned. Alternative partners offer an alternative approach to the liberal democracy promoted by the West.

### China's model: "authoritarian capitalism" vs "liberal democracy"?

In recent years, China has opened political dialogue with Africa, Latin America as well as Southeast Asia. Economic growth and unprecedented development have enabled China to share the governance structures that have led to this success.

The Belt and Road Initiative (BRI) as defined by President Xi has five goals: Achieve policy, Infrastructure, Trade, Financial and People-to-people connectivity.

The "People-to-people connectivity" is fostered through political party training program such as:

- Lectures at Chinese education or training institutions
- Field trips to a local government for first-hand experience and meetings with local officials, farmers and businesses
- Cultural programmes to familiarise participants with Chinese traditional culture.

Another aim is to grow networks between the Chinese Communist Party (CCP) and other political parties in Africa while providing training on CCP style governance such as:

- Influencing public opinion
- Government-media relations
- Internet censorship and opposition monitoring
- Managing criticism of the party
- Fostering constituent loyalty

Although the CCP has engaged with ruling parties such as the African National Congress of South Africa and the Jubilee Party of Kenya (until 2022 elections), political training has also been offered to other political parties such as the Communist Party of South Africa, the National Congress Party of Sudan, the Sudan People's Liberation Movement of South Sudan and the South West African People's Organization of Namibia.



**Under the China-Africa Action Plan 2018-2021, China pledges to train 50,000 African civil servants**



**China trained more than 2000 young political leaders in Africa between 2011 and 2015**

### Iran's footprint in Africa

- Iran's footprint in Africa is growing, based on the opportunity to capitalise on the anti-western mood, and to counteract the influence from Saudi Arabia, the UAE, Israel and the US on the continent, specifically when it comes to the control of the Red Sea corridor.
- Iran has already for many years opened "cultural centres" and financed schools and hospitals, especially in countries with a Shia community: Chad, DR Congo, Egypt, Ghana, Nigeria, Senegal and Tanzania.
- Between 2022 and 2023, African countries have hosted diplomatic visits: Burkina Faso, Ghana, Mali, Senegal, Sierra Leone and Tanzania. In January 2023, the Islamic Republic of Iran has announced the nomination of an ambassador to Burkina Faso.

## SPOTLIGHT

### Africa and Latin America: increased cooperation prospects?

#### Brazil back on track

During his first two terms in office (2003- 2010), President Lula initiated the opening of 19 Brazilian embassies in Africa. Bilateral trade between Brazil and Africa increased seven-fold, from \$4 billion to \$28 billion during this period. President Lula also devoted special attention to Africa, promoting investment in infrastructure, food security, health, biodiversity, science and technology. Africa remained a key focus for the Instituto Lula, including partnerships with the AU, NEPAD and FAO.

As his third mandate began in January 2023, President Lula is already planning his first trip to Africa in the coming months, not limited to Portuguese-speaking countries: Angola, South Africa, Mozambique, Nigeria, Senegal.

#### The PALOP group (Países Africanos de Língua Oficial Portuguesa):

Formed in 1992, the organisation groups the six African Lusophone countries: Angola, Cabo Verde, Guinea-Bissau, Mozambique, São Tomé and Príncipe, Equatorial Guinea.

Brazil has technical cooperation agreements with all Portuguese-speaking PALOP countries, under the coordination of the ABC (Agência Brasileira de Cooperação), in partnership with several key Brazilian institutions, such as FIOCRUZ, SENAI, federal and state universities, the Ministry of Health, the Office of the Federal Public Defender, the National Council of Justice, the Public Ministry, the Central Bank of Brazil, the National Cancer Institute, and the National School of Public Administration.

Noteworthy are the Professional Training Centres implemented in Cabo Verde, Mozambique, Guinea-Bissau, São Tomé and Príncipe and Angola, focusing on the employability of the local young population, the expansion of the supply of qualified professionals for the market, and the increase of competitiveness in the industrial sector.

#### “Cooperating in a mutating world”

Launched in 2012, the Atlantic Dialogues hosted in Marrakech by the Policy Center for the New South initial vision was to “underscore the growing importance of Africa and Latin America as key actors of the Southern Atlantic space”. The 2022 theme was: “Cooperation in a Mutating World: Opportunities of the Wider Atlantic”.

In May 2023, only 5 months after his investiture, President Lula should visit Angola, Mozambique and South Africa, with a potential additional tour to São Tomé and Príncipe, Nigeria and Congo Republic in the second semester of 2023. Former foreign affairs Minister Celso Amorim, who opened 19 embassies in Africa during the first Lula government, committed in 2023 to reopen the African embassies closed by former President Bolsonaro.



**Brazil is a founding member of the BRICS group**

## SPOTLIGHT

### Political interference: the rise of hybrid threats

According to the Africa Center for Strategic Studies (ACSS), disinformation campaigns are rampant across Africa.

- Of the more than 50 documented disinformation campaigns on the continent, roughly 60% are externally driven.
- Russia has targeted at least 16 African countries.
- In Somalia, a disinformation campaign was led by Egypt and the UAE.
- China and Israel have also engaged in political campaigns in Africa.

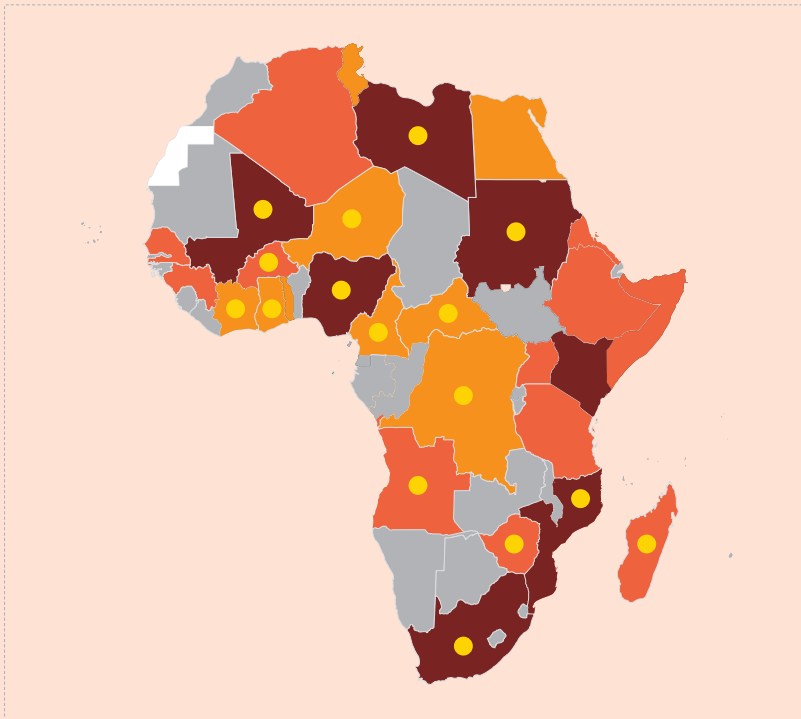
According to the European Union Institute for Security Studies (EUISS), “sub-Saharan Africa is becoming a testing ground for hybrid threats. While violent extremism and terrorism will remain security priorities for the next decade and beyond, multiple forms of hybrid threats constitute an exponential challenge in the transnational security landscape”.

Beyond cyberattacks and information manipulation, these threats also include foreign interference in elections.

**60% of disinformation campaigns in Africa are externally driven**

**At least 7 African countries have had 3 or more disinformation campaigns**

### African countries: disinformation campaigns (2014–2022)



According to the ACSS, Russia's information manipulation activities have targeted at least 16 African countries – Angola, Burkina Faso, Cameroon, Central African Republic, Côte d'Ivoire, DR Congo, Ghana, Libya, Madagascar, Mali, Mozambique, Niger, Nigeria, South Africa, Sudan and Zimbabwe.

- 1 campaign
- 2 campaigns
- 3 or more campaigns
- Russian sponsored campaign(s)


Source: MIF based on Africa Center for Strategic Studies

## SPOTLIGHT

### Summit competition

#### Nine Africa summits/meetings between November 2021-December 2023

- 1 November 2021: Eight Forum on China-Africa Cooperation (FOCAC) ministerial meeting, Dakar, Senegal
- 2 December 2021: Third Turkey-Africa Partnership Summit, Istanbul, Turkey
- 3 February 2022: Sixth African Union/ European Union (AU/EU) Summit, Brussels, Belgium
- 4 August 2022: Eight Tokyo International Conference on African Development (TICAD8), Tunis, Tunisia
- 5 December 2022: Second US-Africa Leaders' Summit, Washington D.C., US
- 6 March 2023: Russia-Africa International Parliamentary Conference, Moscow, Russia
- 7 March 2023: Second Africa-India Field Training Exercise (AFINDEX,) Pune, India
- 8 Scheduled July 2023: Second Summit Russia–Africa Economic and Humanitarian Forum, St. Petersburg, Russia
- 9 Scheduled December 2023: Arab League - AU Summit, Riyadh, Saudi Arabia

 The 2<sup>nd</sup> Russia-Africa Summit is scheduled for July 2023 in St. Petersburg

Europe: Sixth AU/EU, February 2022, Brussels

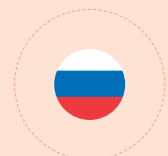
*"A joint vision for a renewed partnership. The aims of the partnership are solidarity, security, peace and sustainable and sustained economic development and prosperity for the citizens of the two Unions today and in the future, bringing together people, regions and organisations. It aims to promote common priorities, shared values, and international law, and to preserve interests and common public goods. This includes the protection of human rights for all, gender equality and women's empowerment in all spheres of life, the rule of law, actions to preserve the climate, environment, biodiversity, as well as sustainable and inclusive economic growth and the fight against inequalities".*

US: Second US-Africa Leaders' Summit, December 2022, Washington D.C.

*"The summit built on shared values to better foster new economic engagement; reinforce the US-Africa commitment to democracy and human rights; mitigate the impact of COVID-19 and of future pandemics; work collaboratively to strengthen regional and global health; promote food security; advance peace and security; respond to the climate crisis; and amplify diaspora ties".*

Russia: Second Russia-Africa Summit, scheduled for July 2023, St. Petersburg

*"The Russia–Africa Summit aims at bringing about a fundamentally new level of mutually beneficial partnership to meet the challenges of the 21<sup>st</sup> century. The goal is to promote efforts to strengthen comprehensive and equal cooperation between Russia and African nations across all areas of society including politics, security, economic relations, science and technology, and the cultural and humanitarian spheres".*



**Japan:** Eighth Tokyo International Conference on African Development (TICAD8), August 2022, Tunis

*"Placed in a post-COVID-19 context, the discussions during this Eighth Conference revolve around three themes: 1. Achieving sustainable and inclusive growth with reduced economic inequalities, 2. Realising a sustainable and resilient society based on human security, 3. Building sustainable peace and stability through supporting Africa's own efforts".*

**India:** Second Africa-India Field Training Exercise (AFINDEX), March 2023, Pune

*"Learning from the African experience in cooperative security & management of security crisis situations and conflicts, and promoting a collaborative approach in capacity enhancement of African armies are among the objectives. The first session will explore the key pillars of India-Africa defence partnership, while the second session will focus on the Indian defence industry's outreach to Africa".*

**Turkey:** Fourth Turkey-Africa Economic and Business Forum (TABEF), scheduled for 2023, Istanbul

The third TABEF theme was Deepening Turkey-Africa Partnership: Trade, Investment, Technology & Logistics *"Turkey and Africa used to seem far away from one another unfortunately despite their shared history dating back more than a thousand years. There used to be many artificial barriers placed between Turkey and Africa, with prejudices eclipsing the truth. We got started by first tearing down these prejudices. We have built bridges from heart to heart between our nation and the peoples of Africa. The essence of our relations with Africa is sincerity, brotherhood and solidarity"*(President Erdogan, opening the third TABEF).

**Africa +1 Summits are not new, but are recurring and more frequent than ever**

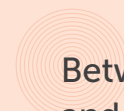
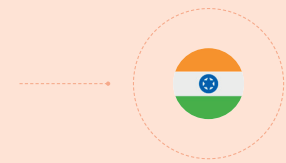
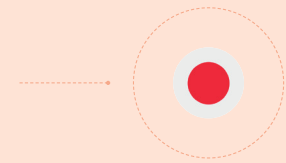
- Since 1973: nearly 30 France – Africa Summits
- Since 1993: Eight Tokyo International Conferences on African Development (TICADs)
- Since 2014: Two US-Africa Leaders' Summits
- Since 2000: Eight Forum on China-Africa Cooperation Summits (FOCAC)
- Since 2008: Three India-Africa Forum Summits (IAFS)
- Since 2008: Three Africa-Turkey Partnership Summits
- By July 2023: Two Russia-Africa Summits

**Summits held by rising powers are the most attended**

- The 2018 FOCAC was attended by 51 African heads of state or government (HoSG)
- The 2022 US-Africa Leaders' Summit was attended by 49 HoSG and the African Union. The US-Africa Leaders' Summit in 2014 was attended by 50 African leaders
- The 2019 Africa-Russia Summit was attended by 43 major African leaders

**Extensive Financial Packages and Support for African countries in attendance**

- 2021 FOCAC: \$40 billion available for different sectors plus \$1 billion for COVID-19 vaccines
- 2015 India-Africa Forum Summit: \$10 billion in concessional credit over 5 years
- 2022 US-Africa Leaders' Summit: \$215 million in new funding to address the Covid-19 pandemic in Africa; \$800 million Transformation with Africa (DTA) Initiative
- 2022 AU/EU Summit: €150 billion in investment package



**Between 2010 and 2016, more than 320 embassies were opened in Africa, likely the biggest embassy-building boom anywhere, ever**

### 19-20 March 2023 - Russia-Africa International Parliamentary Conference

The Conference was attended by 40 African delegations.

*"Russia and African countries uphold the norms of morality and social principles that are traditional for our peoples and oppose the neo-colonial ideology imposed from outside. Many states of Asia, the Middle East and Latin America adhere to similar positions, and together make up the world majority...We are ready to jointly shape the global agenda, work together to strengthen fair and equal interstate relations, and improve mechanisms for mutually beneficial economic cooperation."* (President Putin, opening the Conference)

Three roundtables were organised:

**1. Legislative Response to Economic Challenges:** *"The modern economic challenges are crises caused by Western countries guided by the United States, numerous economic sanctions aimed at destroying the Russian economy, introduced in violation of all international trade rules and foreign economic relations. Unlike many Western countries, Russia does not have colonial experience, and the contribution of the Soviet Union to the liberation of African countries from colonial dependence is also well known. Africa stands for an equal partnership: mutual economic interests include investments, cooperation within production chains, cooperation in strategic infrastructure projects, energy, medicine and financial technologies. It is necessary to support the transformation processes of a multipolar world"*.

**2. Indivisible Security: Capabilities and Contributions of Parliaments.**  
*"Participants of the round table discussion on the topic "Indivisible Security: Capabilities and Contributions of Parliaments" thoroughly examined the importance of sovereignty protection, non-interference in the internal affairs of other countries, fight against poverty, countering terrorism and military biological threats".*

**3. Neocolonialism of the West: How to Prevent the Repetition of History.**  
*"Russia and African countries want an equal world without imposition of Western paradigm of consciousness".*

*"(Increasing Africa's international prestige) is an absolutely objective and logical trend which the collective West, led by the United States, does not want to acknowledge. They want to preserve their superiority and role as global hegemon, things that are becoming a thing of the past. They are reluctant to change their mentality of neocolonialism and are using well-known means of deterrence, such as sanctions, threats, blackmail, double standards, and blatant hypocrisy... Russia has always been committed to the principles of equality, mutual respect, the inherent right of each state to choose its own path of development, its own future without interference from the outside. Russia's cooperation, mutually respectful and equal, with African countries has been built on these principles for decades."*  
(V. Matviyenko, Speaker of the Federation Council)

*"Russia and African countries are united by shared goals: We stand together for building a multipolar, just world based on respect for the traditions, culture, and history of the countries with which we are building mutually beneficial cooperation"* (V. Volodin, Chairman of the State Duma).



# Chapter 03.

## Africa's voice in the current multilateral architecture

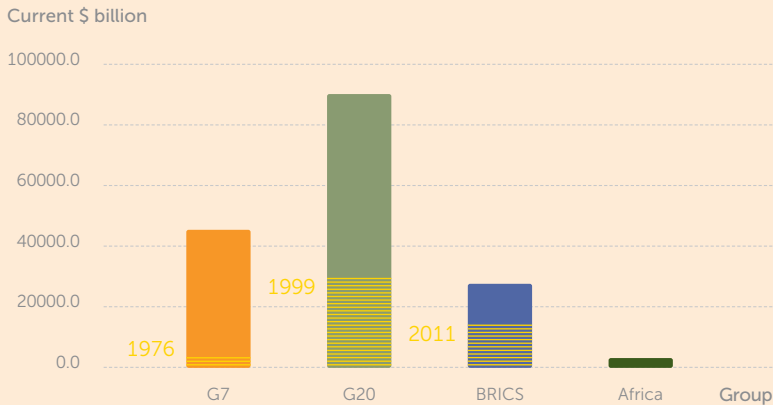




## SPOTLIGHT

### G7, G20, BRICS...: how representative?

#### Africa & inter-governmental groups: GDP (year of creation-2023)

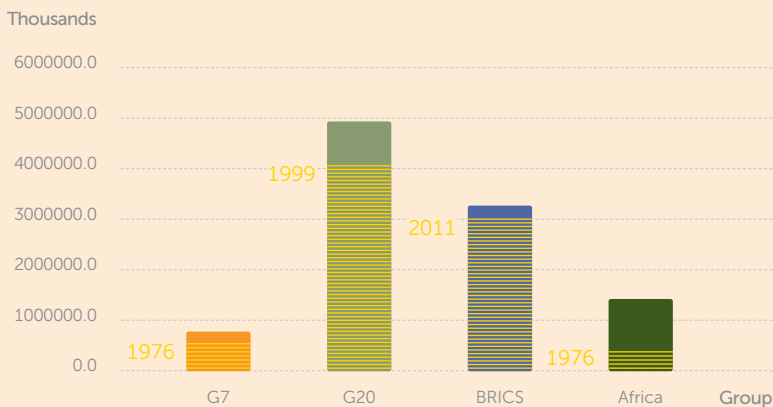


Currently, 22 countries are interested in joining the BRICS group. Among them: Algeria, Argentina, Egypt, Mexico, Nigeria, Saudi Arabia and the UAE

— Year of creation

Source: MIF based on IMF & World Bank

#### Africa & inter-governmental groups: total population (year of creation-2023)



Africa's share of global GDP was 2.8% in 1976 (WB) and is still only 3% in 2023 (IMF).

— Year of creation

Source: MIF based on UNDESA

#### G7: less wealth, less people

The G7's share of global GDP fell from 61.8% since its creation in 1976 (WB) to 42.6% in 2023 (IMF). The G7's share of the global population fell from 14.3% to 9.7%, while the world population almost doubled from 1976 to 2023.

#### G20: less wealth, less people

The G20's share of the global population fell since its creation in 1999 from 67.2% to 61.7% in 2023. The G20's share of global GDP fell from 89.8% in 1999 (WB) to 84.8% (IMF).

#### BRICS: growing wealth

The BRICS's group share of global GDP grew from 19.6% in 2011 (WB) to 26.1% in 2023 (IMF). The BRICS's share of global population has stayed close to 40% over the period.

In 2023, Africa's share of global population is 18% - almost double that of the G7

Notes: GDP data at date of creation was collected from WB as IMF data only goes back to 1980, similarly, 2023 estimates were collected from IMF as WB only goes up to 2021. As such these data points are treated as proxies and are not directly comparable.

The Group of Eight (G8) was an inter-governmental political forum from 1997 until 2014. It had formed from incorporating Russia into the Group of Seven, or G7, and returned to its previous name after Russia was expelled in 2014. For the purpose of the GDP and population calculations here, only the original G7 countries have been taken into account: Canada, France, Germany, Italy, Japan, the UK and the US.

**At the General Assembly (UNGA): the largest voting bloc**

Africa makes up the largest voting bloc in the UNGA with 28.0% of the vote, compared to Asia's 24.4%

- North America has 1.0% of the vote, while Europe makes up 22.3%.
- Latin America and the Caribbean has 17.1% of the vote, while Oceania makes up 7.3%.

**World regions: share of membership votes and power in UN bodies**

	Africa	Asia	Europe	Latin America and the Caribbean	Oceania	North America
Members (2023)	54	47	43	33	14	2
UNGA Votes (%) (2023)	28.0%	24.4%	22.3%	17.1%	7.3%	1.0%
UNSC P5 (2023)	0	1	3	0	0	1
Time spent in UNSC Presidency (% of total time since 1946)	16.3%	20.8%	38.0%	14.5%	2.0%	8.5%

Source: MIF based on UN

**Africa = 54 members, 28% of UNGA votes, 0 UNSC permanent seats versus North America = 2 members, 1% of UNGA votes, 1 UNSC permanent seat**

**At the Security Council (UNSC): no permanent seat**

While the overall membership of the UN has nearly quadrupled from 51 members in 1945 to its current 193 members, there has been no evolution of the UNSC membership.

There are five permanent members (P5): China, France, Russia, the United Kingdom, and the United States, holding veto power.

There are 10 elected members (rotating), without veto power.

- Three African countries are currently non-permanent UNSC members: Gabon, Ghana and Mozambique.

**Russia is chairing the UNSC since April 2023**

Since 1946, African countries have accounted for 16.3% of total month-long presidencies of the UNSC. Europe and Asia dominate chairmanship time with 38.0% and 20.8% respectively.

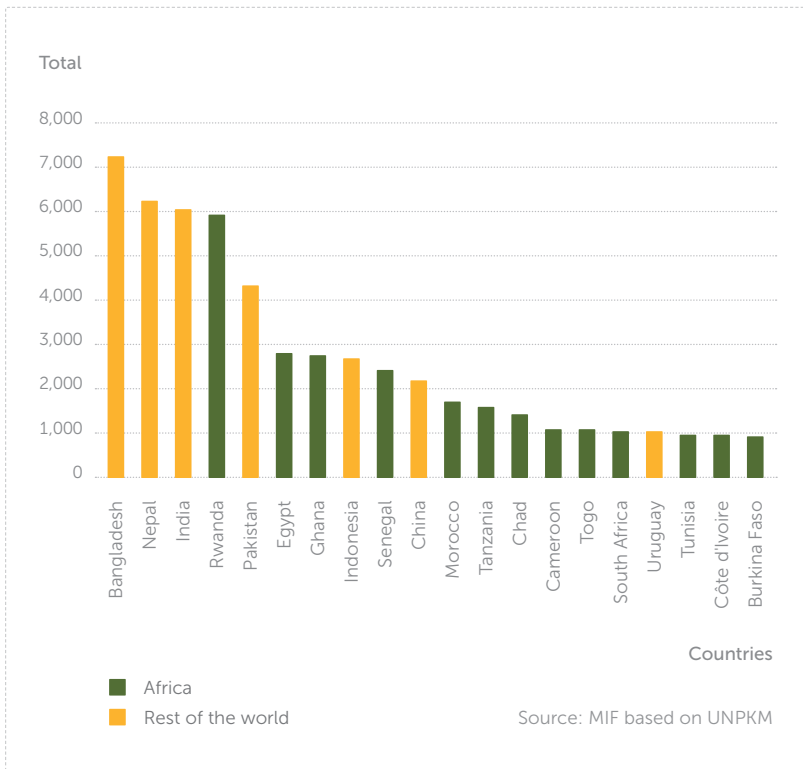
- For Africa, the country which chaired the UNSC the most is Nigeria (10 months), followed by Egypt, Tunisia, and Ghana (7 months).
- Of the bottom 20 countries to have chaired the UNSC, nine are African.

France, China, the US and the UK are the countries with most time spent in the presidency.

Despite forming the largest group of any world region at the UNGA (28%), and with at least 50% of UNSC Resolutions in 2022 relating to African issues, only 3 UNSC members are African - none of them permanent.

**UN Peacekeeping Missions (UNPKM): Africa contributes over 40% of all troops**

Top 20 world countries: UN Troop and Police Contributors (December 2022)

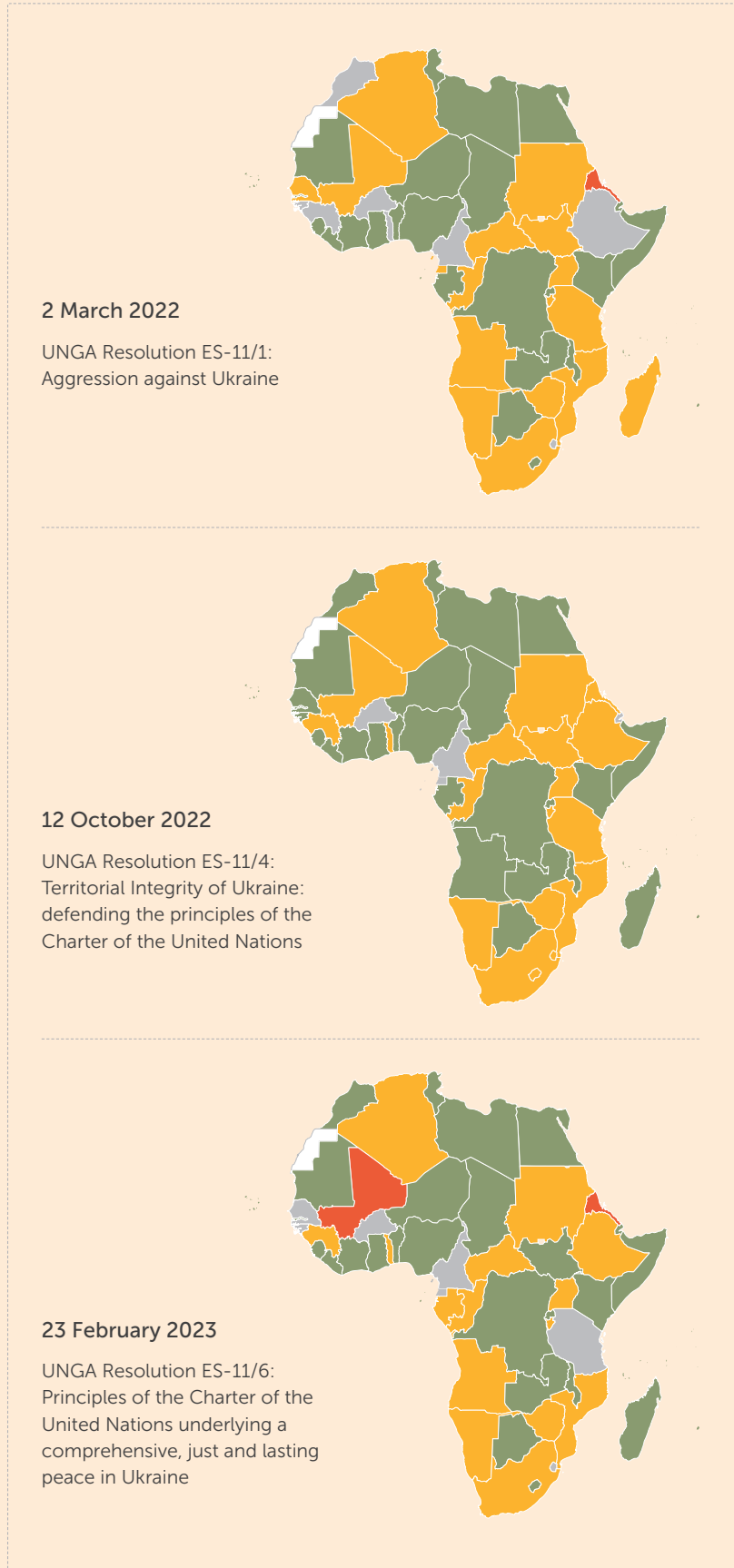


43.7% of all troop and police personnel in active UNPKM are African

Rwanda, Egypt, Ghana and Senegal are in the top 10 contributing states to UNPKM personnel on the ground

SPOTLIGHT 

**Africa's position in the Russia-Ukraine conflict**




**Evolution of African votes against Russia/Ukraine war: "friends or foes"?**

2 March 2022: 1 against, 8 absent, 17 abstentions, 28 for

12 October 2022: 0 against, 5 absent, 19 abstentions, 30 for

23 February 2023: 2 against, 7 absent, 15 abstentions, 30 for

 Between March 2022 and February 2023, Mali went from *Abstention* to *Against*, Gabon went from *For* to *Abstention*, Tanzania went from *Abstention* to *Absent*

African votes

- For
- Against
- Abstention
- Not present

Source: MIF based on UN

**Africa at International Monetary Fund: the most members, the most programmes, only 6.5% of voting shares**

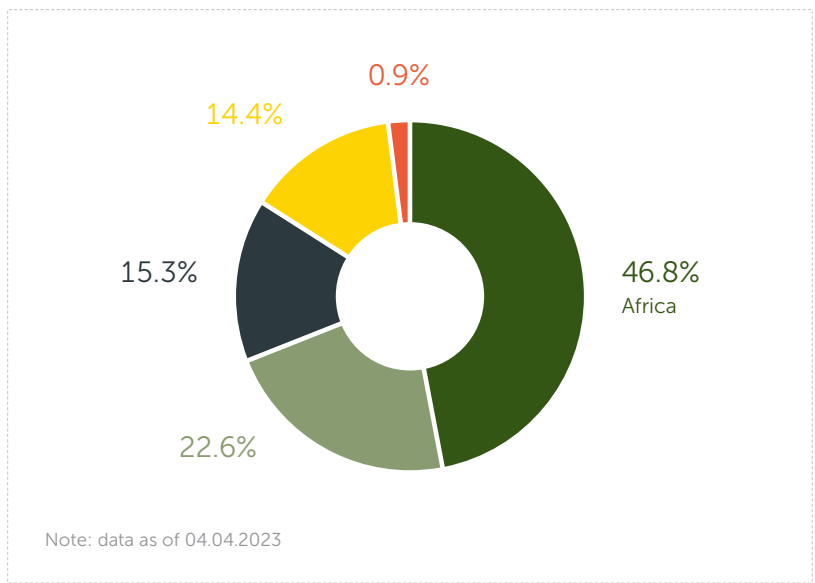
Africa has more IMF members than any other world region, accounting for 54 out of the 190 members.

African countries have carried out by far the most IMF programmes and are the most directly impacted by the IMF operations.

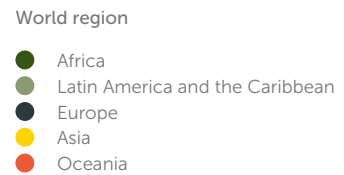
**Africa has had the most IMF programmes of any region this century**

**The US and Europe's 'gentleman's agreement'**  
According to a gentleman's agreement between the US and Europe, the IMF is always led by a European and the World Bank by a US national.

World regions: total IMF programmes (2000-2023)



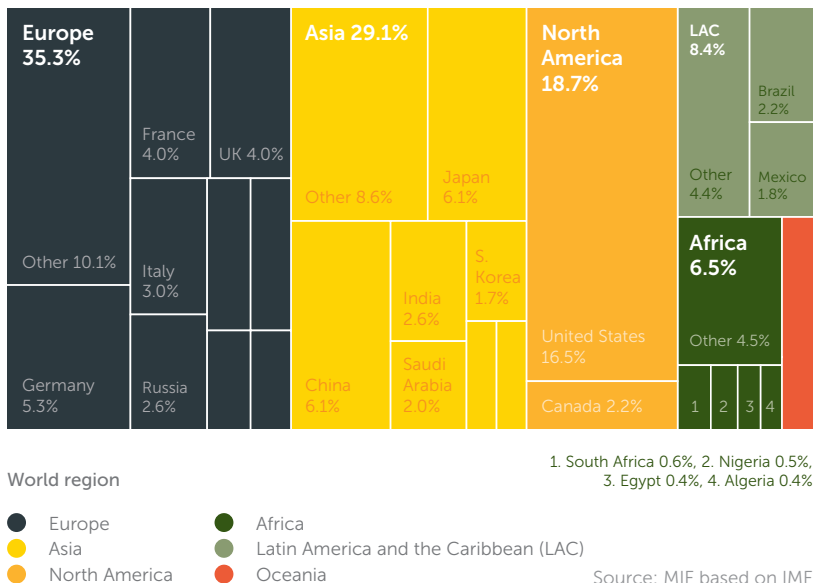
Africa holds only 6.5% of voting shares at the IMF, the lowest weight of any region bar Oceania



Source: MIF based on IMF

**Africa holds only 6.5% of voting shares at IMF, the lowest weight of any region but Oceania**

World region: share of IMF votes (2023)



The US, with 16.5% of IMF voting shares, has an effective veto power on major decisions which require an 85% majority, including any change in quotas.

The G7 alone holds over 40% of voting shares in the IMF despite representing less than 5% of IMF members and less than 10% of the global population.

### Africa at the World Bank: most IDA eligible countries, most IDA loans, only 11% of voting shares

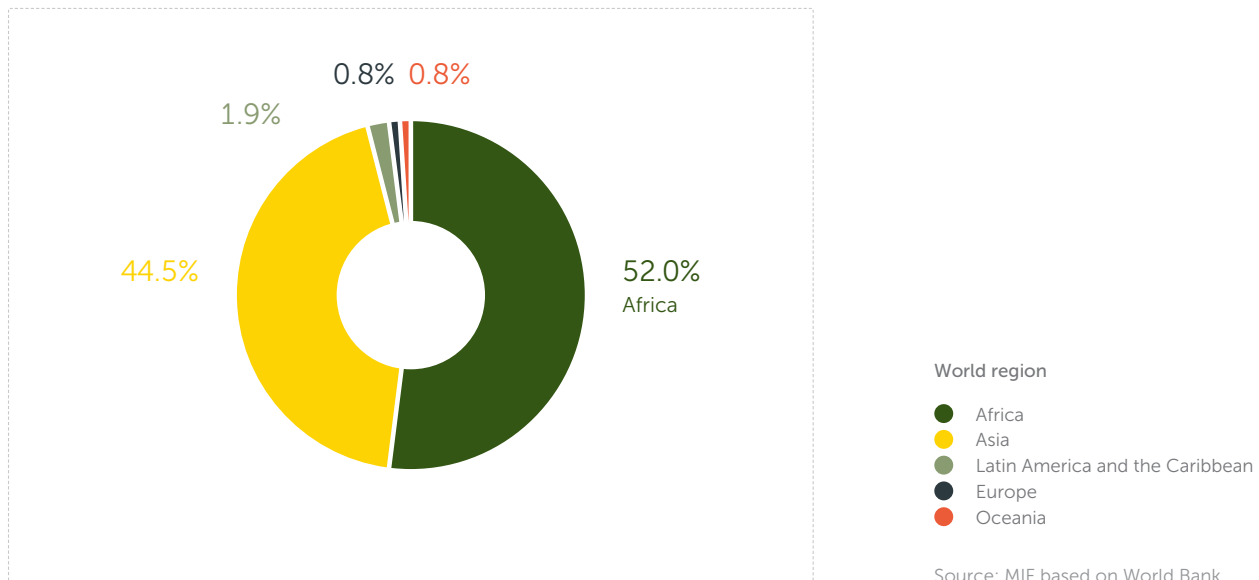
Over 99% of World Bank lending to Africa occurs through the International Development Association (IDA), which provides concessional lending to the world's poorest countries, and the International Bank for Reconstruction and Development (IBRD), which primarily lends to middle-income countries.

- African countries account for 40 out of 75 countries eligible to receive IDA resources.
- Africa accounted for over half of total IDA loans (52.0%) between 2012 and 2021.

**Africa and IDA: most eligible countries, most loans, but only 11% of voting shares**

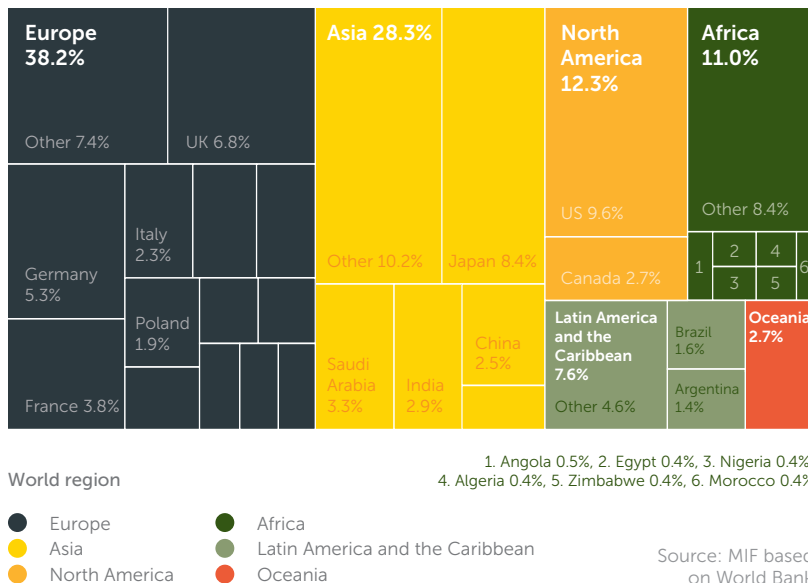
### Africa accounts for over half of IDA lending

World regions: IDA loan disbursements (2012-2021)



### Africa accounts for only 11.0% of IDA votes

World regions: IDA voting shares (2021)



**Who runs the World Bank?**

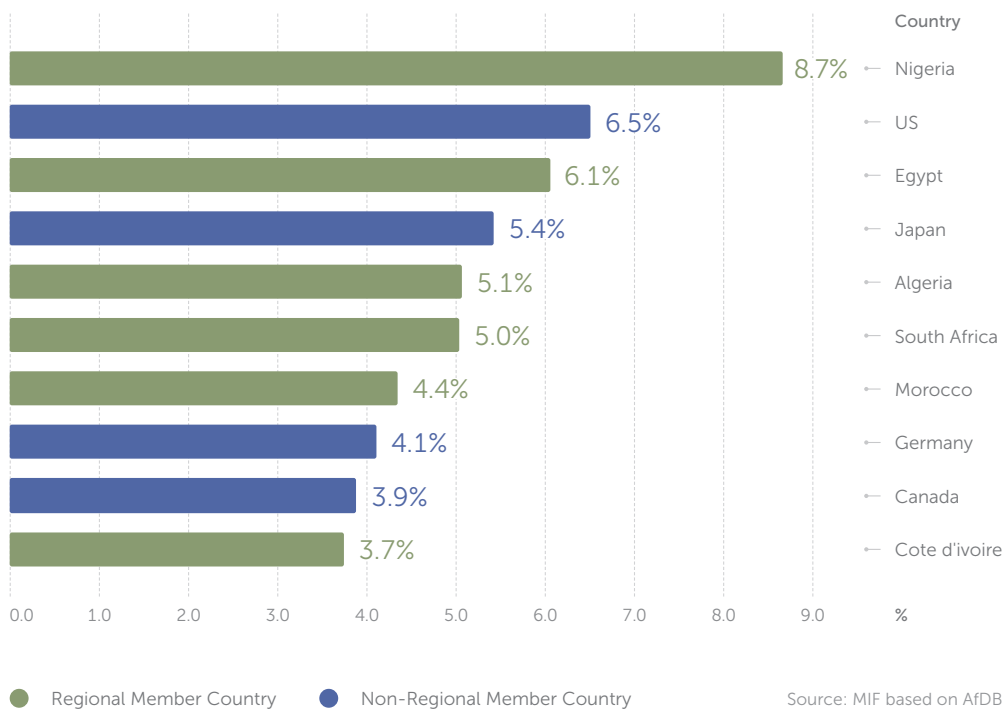
The World Bank Group's daily operations are run by 25 Executive Directors. The US, Japan, China, Germany, France and the UK each appoint one Executive Director. The remaining 184 member countries elect 19 Executive Directors between them.

### The IBRD: Africa has a small voting share and less than one-fifth of loans

The IBRD covers roughly one third of World Bank lending to Africa. The IBRD primarily lends to middle-income countries. Only 16.4% of IBRD loans went to Africa between 2012 and 2021 and Africa only accounts for 7.3% of votes.

### Even at the AfDB, four of the top ten countries by voting shares are non-African

#### Top 10 AfDB members: voting share (2022)



Even in the AfDB, non-African nations have considerable influence over bank policies and priorities. Voting shares are divided between African regional-members (58.8%) and non-regional members (41.2%) from outside the continent.

Even though the top voting shares are for Nigeria (8.7%), four of the top ten countries by voting shares are not African: US (6.5%), Japan (5.4%), Germany (4.1%) and Canada (3.9%).



**The African Union: dual leadership and limited budget**

The African Union (AU) is a continental body made up of 55 member states.

The **Assembly**, comprising the Heads of State and Government, is the AU’s supreme policy and decision-making organ.

The **Chairperson of the African Union** is voted in by the member states, among the current Heads of State or Government, for one year only, without renewal.

For the EU, the President of the European Council (PEC) is appointed as a full-time President for a 2.5-year term, renewable once. Since 2009, all PECs have been former Prime Ministers.

AU Chairperson	Country	In office
H.E. Azali Assoumani	Comoros	Feb 2023-current
H.E. Macky Sall	Senegal	Feb 2022-Feb 2023
H.E. Felix Antoine Tshisekedi	DR Congo	Feb 2021-Feb 2022
H.E. Cyril Ramaphosa	South Africa	Feb 2020-Feb 2021
H.E. Abdel Fattah el-Sisi	Egypt	Feb 2019-Feb 2020

Source: MIF Based on AU

The **Chairperson of the Commission** is elected by the Assembly for a four-year term, renewable once.

AUC Chairperson	Country	In office
Mr. Moussa Faki Mahamat	Chad	2017-current
Ms. Nkosazana Dlamini Zuma	South Africa	2012-2017
Mr. Jean Ping	Gabon	2008-2012
Mr Alpha Oumar Konaré	Mali	2003-2008
Mr Amara Essy	Côte d’Ivoire	2002-2003 (*OAU -AU transition years)

Source: MIF Based on AU

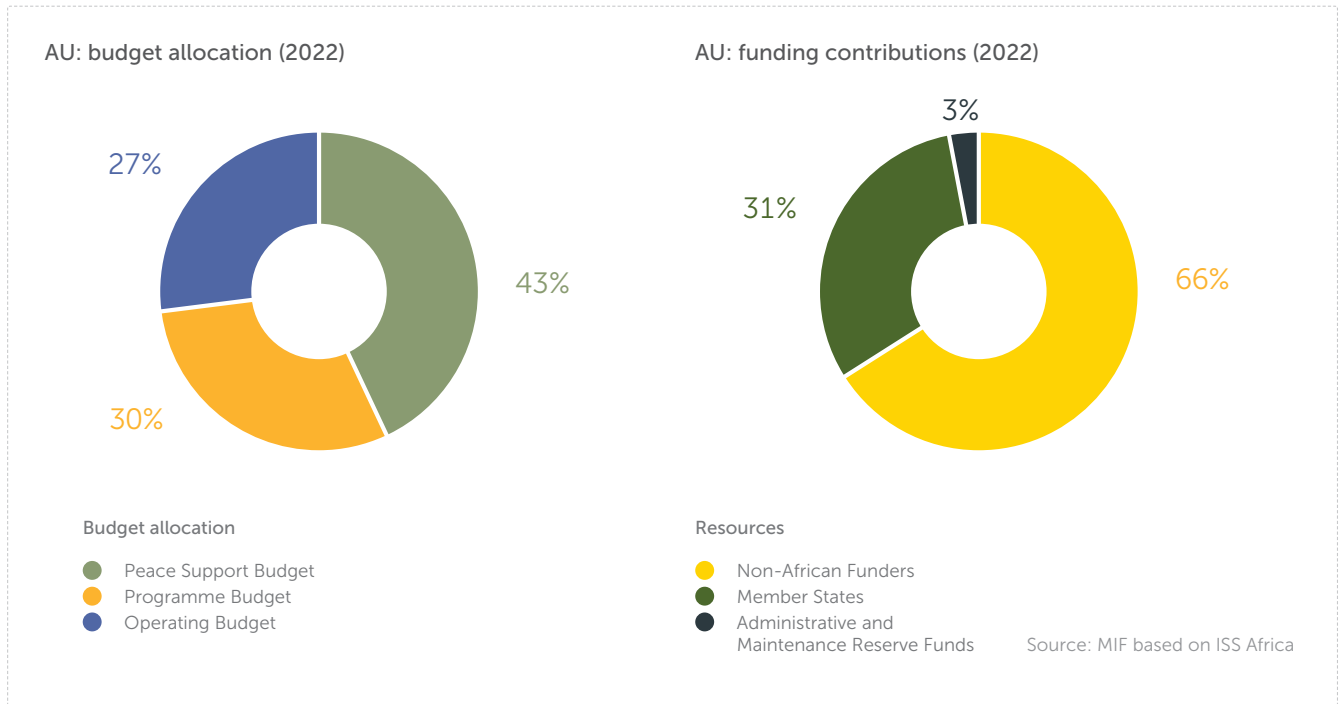
**The AU struggles to self-finance**

AU members are supposed to provide fees to pay for the operations of the organisation. In 2022, the AU began naming countries that were paying less than half of their fee contributions to the AU budget. 14 countries were subjected to cautionary sanctions.

With the implementation of the decision to impose a 0.2% levy on eligible imported goods, 11 Member States have used this levy to pay their dues partially or fully.

Over 1/3 of AU Member States do not pay their full contribution to the annual AU budget

AU budget: allocation and resources (2022)

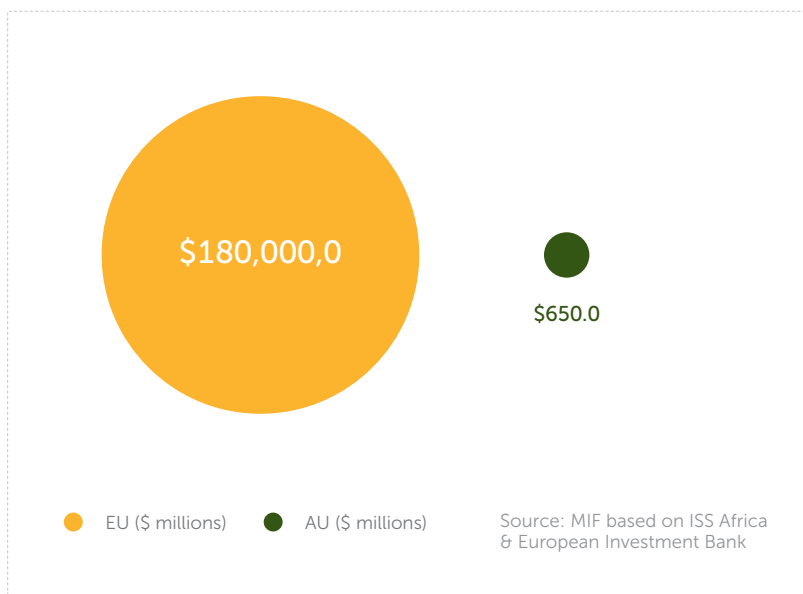


As of 2022, the AU is reliant on external contributors for 66% of its total annual budget, with 31% coming from Member State contributions and the remaining 3% from administrative and reserve funds.

The largest share of the AU's total budget is spent on its Peace Support Budget, which is almost entirely funded by external partners.

**In 2021, the AU's peace support budget was entirely funded by external partners**

EU & AU: total budget (2022)



**Comparing the AU and the EU**

While the EU's 2022 budget was \$180 billion, the AU's budget for the same year was \$650 million.

With 27 member states in the EU vs 55 member states in the AU (currently reduced to 51 with the suspension of Sudan, Guinea, Mali and Burkina Faso following recent coups) and a population less than three times that of Africa, the EU has a budget 276 times bigger than the AU.

## SPOTLIGHT

### African heads of multinational bodies



**Amina J. Mohammed** (Nigeria), United Nations Deputy Secretary General and Chair of the United Nations Sustainable Development Group since 2017



**Audrey Azoulay** (Morocco), Director General, United Nations Educational, Scientific and Cultural Organisation (UNESCO) since 2017



**Gilbert F. Houngbo** (Togo), Director General of International Labour Organization (ILO) since October 2022



**Ibrahim Thiaw** (Mauritania), Under-Secretary-General and Executive Secretary of the United Nations Convention to Combat Desertification (UNCCD) since 2019



**Louise Mushikiwabo** (Rwanda), Secretary General of Organisation Internationale de la Francophonie (OIF) since 2018



**Makhtar Diop** (Senegal), International Finance Corporation (IFC) Managing Director and Executive Vice President since 2021



**Ngozi Okonjo-Iweala** (Nigeria), WTO Director-General since 2021



**Pramila Patten** (Mauritius), Officer in charge of UN Women since 2021



**Sanda Ojiambo** (Kenya), Assistant Secretary-General and CEO of the United Nations Global Compact since 2022



**Tedros Adhanom Ghebreyesus** (Ethiopia), WHO Director-General since 2017



**Winifred Byanyima** (Uganda), Executive Director of the Joint United Nations Programme on HIV and AIDS (UNAIDS) since 2019



**Damilola Ogunbiyi** (Nigeria), CEO of Sustainable Energy for All (SEforALL) and Special Representative of the UN Secretary-General for Sustainable Energy for All

## Africa's economic powerhouses: representing the continent in global forums

As of 2023, three countries represent almost half (46.7%) of the continent's GDP: Nigeria (18.3%), Egypt (15.0%) and South Africa (13.4%).

In terms of population share, Nigeria is 1<sup>st</sup> at 15.3% and Egypt 3<sup>rd</sup> at 7.7%. South Africa is 7<sup>th</sup> (4.2%). Combined, these three countries represent more than one fourth (27.2%) of Africa's total population.

### South Africa: the only African country represented on global coalitions such as the G20, BRICS and the OECD

**G20:** South Africa is currently the only G20 member representing Africa. In 2023, South Africa will be joining the G20 "troika" which is a three-member group of past, current and succeeding presidencies, and will take up the G20's presidency in 2025.

**BRICS:** At the fifth BRICS summit in Durban (2013), South Africa called for BRICS-Africa cooperation on infrastructure. In 2023, South Africa is taking over the BRICS chairmanship and will host the summit scheduled for August 2023.

**OECD:** In 2007, South Africa became one of five key partners to the OECD. As of 2018, South Africa has been an associate in six OECD bodies and projects, and a participant in 15. South Africa has led many of the OECD's regional initiatives in Africa.

### Egypt: one of Africa's most globally active countries


Egypt dominates the global diplomatic engagement with 131 diplomatic missions abroad and memberships of various international organisations.

In 2023, Egypt became a member of BRICS' New Development Bank (NDB). Prior to that, Egypt hosted the UN Climate Change Conference (COP27) in 2022.

### Nigeria: Africa's most populous country

Nigeria is leading the demographic growth of Africa with a population expected to double by 2050.


Nigeria is also a member of the Organization of the Petroleum Exporting Countries (OPEC), the Organization of Islamic Cooperation (OIC), as well as of MINT (Mexico, Indonesia, Nigeria and Turkey).



South Africa has the highest African voting shares in the IMF (0.6%), and comes 6<sup>th</sup> for the AfDB members' voting shares (5.0%)



Egypt has the 3<sup>rd</sup> highest African voting shares in the IMF (0.4%), and comes 2<sup>nd</sup> for the AfDB members' voting shares (6.1%)



Nigeria has the highest member voting shares in the AfDB (8.7%), and the 2<sup>nd</sup> highest African voting shares in the IMF (0.4%)

## SPOTLIGHT

### Reforming the multilateral architecture: multiple proposals

#### UN reform proposals

##### Main UNSC Reform Plans



##### Proposal of the G4 (Brazil, Germany, India and Japan)

Enlarging the number of seats to 25

Permanent seats: The G4 + two states from the African Group including South Africa

Non-permanent seats: +4



##### Proposal of the Coffee Club (Canada, Italy, Argentina, Pakistan, Mexico, New Zealand, Spain, Sweden and others)

Non-permanent seats: +10

Creation of semi-permanent members

Limiting the veto power of permanent members on a case-by-case basis



##### Proposal of the Secretary-General's High-level Panel on Threats, Challenges and Change

Two options



##### Proposal of the African Union

At least two permanent seats with veto power

Non-permanent seats: +5

Source: MIF based on UN

#### UK Government suggestions

- Expansion of both permanent and non-permanent seats.
- Permanent seats for the G4 (India, Germany, Japan and Brazil) as well as permanent African representation in some form.
- Co-sponsor the Veto Initiative which will hold vetoing powers to account.

#### US Government suggestions

In September 2022, President Biden affirmed US support for increasing the number of permanent and non-permanent representatives. Particularly, the inclusion of countries from Africa, Latin America, and the Caribbean, in addition to “those nations [the US has] long supported” - including the G4 countries.



**J.E. Schwartzberg**  
proposal: weighted  
voting in the UNGA,  
based on variables such  
as population and/or  
gross national income

#### China suggestions

*“Increasing the representation of developing countries as part of the reform of the UNSC. Any reforms should enable more countries, particularly small and medium-sized states, to get involved in the UNSC’s decision-making process. It should correct the over-representation of developed countries, improve the representation of developing countries, **correct the historical injustice suffered by Africa**. It should also provide more opportunities to small and medium countries from Asia, Africa, Latin America, the Middle East, and small island countries.”* - Chinese State Councilor and Foreign Minister Wang Yi in 2022.

#### G20 reform proposals

The G20 plays an important role in shaping as well as strengthening the global architecture and governance on all major international economic issues.

Currently, the G20 comprises 19 countries plus the EU as such. South Africa is the only African country in the organisation. Of the nine guest countries, three are African (Bangladesh, Egypt, Mauritius, Netherlands, Nigeria, Oman, Singapore, Spain and the UAE).

Africa’s G20 fully fledged membership has been strongly advocated by the previous Chairperson of the African Union, Macky Sall. It has already been backed by Indonesia (outgoing G20 Chair), Russia, China, France and the US.

### Bretton Woods institutions reform proposals

In recent years, the challenging combination of the COVID-19 pandemic, worsening climate change, the fallout of the Ukraine-Russia conflict, and the spectre of a public debt crisis has led to growing criticism and concerns from the Global South, itself still facing tremendous development challenges over the efficiency of the current multilateral financial system, created almost 80 years ago.

*"The impact of these compounding shocks on developing countries is aggravated by an unfair global financial system that is short-term oriented and crisis-prone, and that further exacerbates inequalities".*  
(UNSG's SDG Stimulus to Deliver Agenda 2030- February 2023)

The financial environment has changed: countries are in higher debt everywhere, capital has become scarce, interest rates are soaring and volatility is growing.

While momentous additional funding is required to build resilience, prevent shocks and mitigate the impact of global crises, specifically climate change. The ongoing funding gap to achieve the SDGs is now estimated at more than a staggering \$4 trillion annually.

The existing model appears unable to rise to the challenges of the 21<sup>st</sup> century. The international financial architecture has to be amended. The 'clients' of Multilateral Development Banks (MDBs), such as African countries, need their voices to be heard.

#### 2023: a key year for reform

- April: IMF/WBG Spring meetings (Washington D.C.)
- May: G7 Summit (Hiroshima)
- June: Summit for a New Global Financial Pact (Paris)
- September: G20 Summit (New Delhi)
- October: IMF/WB Annual Meetings (Marrakech)
- December: conclusion of IMF Quotas 16th General Review

#### Leveraging Africa's own resources

Fighting illicit financial flows, enlarging tax revenues and making use of pension funds are also key to providing additional needed resources.

Pursuing the dual goal of sustainability and development is key, without deprioritising one for the other

\$88.6 billion leaves the continent annually as illicit capital flight - more than the \$83.0 billion received in FDI inflows in 2021

### Making the global system work for the Global South

- **Give a better voice to the Global South at IMF and WBG**
  - Balance the creditor-centred approach with borrowers' priorities.
  - Create a double majority system on significant decisions which would require not only shareholder majorities but also member-state majorities.
- **Expand concessional finance**
  - Increase grant and below market rate financing for global goods such as climate mitigation and adaptation.
- **Reduce policy conditionality**
  - Give borrower countries the policy space to pursue their own development paths.
  - Scrap burdensome austerity measures on loan conditions.
- **Leverage MDBs' balance sheets**
- **Innovate in financial engineering (e.g. 'hybrid capital')**
- **Create specific financial relief mechanisms for potential natural disasters and pandemics**
  - Automatically suspend servicing payments in times of crisis.
  - Launch specific fund/trust/mechanism for quickly raising reconstruction grants, to avoid raising the debt levels of the most vulnerable countries.
- **Increase process efficiency**
  - Remove lending approval delays.
  - Reduce the burden of excessive conditionalities.
  - Increase coordination on the ground.
- **Limit the US dollar dominance**
  - Democratise the issuance of reserve currencies and move towards a multipolar global monetary system.
  - Reduce the dependence on the dollar and hard currencies in trade and finance and increase the use of local currencies to reduce Africa's financial instability.
  - Increase investor demand for local currency debt MDBs by expanding credit and risk guarantees for eligible borrowers.
  - Promote the use of GDP-linked local currency bonds to encourage demand for local currency debt.
- **Extend SDR's recycling**
  - Increase the recycling of Special Drawing Rights (SDRs) through MDBs (such as the AfDB) to complement the IMF's Resilience and Sustainability Trust (RST).

**The Borrowers' Club:** Proposed by *Development Reimagined*, the 'Borrower's Club' would allow countries to take loans together, using each other's growth prospects as collateral. The loan repayments would be small, with low interest – while sufficient to build in a 'cushion' for temporary collateral.

**Afreximbank's Pan-African Payment System (PAPSS),** launched in January 2022, will make African currencies freely convertible with one another without having to go through a third currency such as the dollar or euro. The initiative could save the continent an estimated \$5 billion in transactions annually.

In 2012, the German government and its national development bank, the KfW, launched the **African Local Currency Bonds Fund** to support the growth of local currency bond markets on the continent.

 **Afreximbank's PAPSS will make African currencies freely convertible with one another - saving the continent \$5 billion annually**

## Ongoing proposals:

### The WBG Evolution Roadmap

The World Bank Group's 'evolution roadmap' aims to better address development challenges such as poverty, shared prosperity, inequality and cross-border challenges including climate change, pandemics, and fragility, conflict and violence. The first draft outlines three building blocks:

- Clarifying and expanding the **Vision and Mission** – broadening the Twin Goals (ending extreme poverty and boosting shared prosperity) and focusing on other Global Public Goods, and expanding the bank's financial capacity.
- Reviewing the **Operating Model** – including options to enhance the country engagement model; broader definitions of poverty, shared prosperity and sustainability, boost private capital.
- Enhancing the **Financial Model** – exploring technical options to expand resources (risk transfer, non-voting hybrid capital and callable capital, and statutory lending limit amendments).

Both civil society and many shareholders consider that the paper lacked the ambition needed. The World Bank's Development Committee has discussed an updated version of the proposal at the Spring Meetings.

### The Bridgetown Initiative

Spearheaded by Mia Mottley, the Prime Minister of Barbados in June 2022, the agenda has been embraced by a number of philanthropic foundations and NGOs.

The first step would be to implement policies that respond to urgent financing needs and are achievable in six months.

- Getting the MDBs to better leverage their balance sheets (Capital Adequacy Framework) in order to increase lending to middle income countries by hundreds of billions.
- Creating contingent debt instruments - include climate and pandemic clauses in debt contracts triggering automatic debt service suspension when crises of a certain scale hit.
- Creating a Global Mitigation Trust seeded with IMF SDRs.

### G20 Financial Architecture Working Group

The International Financial Architecture Working Group is one of the important workstreams under the G20 Finance Track with a focus on strengthening the international financial architecture. It also aims to address multiple challenges faced by vulnerable countries.

The first G20 International Financial Architecture Working Group meeting under the G20 Indian Presidency met on 30-31 January 2023 in Chandigarh.

### Paris Summit for a new Financing Pact 22-23 June 2023

Co-chaired by Emmanuel Macron and Narendra Modi, the summit will bring together an informal group of countries to discuss an agenda for a shift in climate and development finance. It is structured around five working groups.

1. Reform of the international financial architecture and especially the MDBs.
2. Support for the private sector in developing economies.
3. Strategy to unlock private investment in green infrastructures in developing and emerging markets.
4. Innovative financing for countries most exposed to climate change.
5. An 'economist group' to provide conceptual inputs to other workstreams.

### UNECA Working Group on Global Financial Architecture

The High-Level Working Group (HLWG) on the Global Financial Architecture, coordinated by the UN Economic Commission for Africa (UNECA), comprises African ministers of finance, planning and economic development, the AU, the AfDB, Afreximbank and the World Bank Group, and includes the participation of staff and executive directors of the IMF. The working group functioned as a platform for building an African consensus on specific requests and proposals for reforming the global financial architecture.

Meeting on the margins of UNECA's 55th Conference of African Ministers of Finance, Planning, and Economic Development in March 2023, the HLWG called for decisive action to reform the global debt architecture to enable the investments needed for achieving both sustainable development and climate goals.



### **The World Trade Organization (WTO): African priorities on the sidelines**

Unlike the World Bank and IMF, WTO major decisions are taken by member states rather than by executive directors. Decisions are normally taken by consensus and not based on majority shareholding. However, the rules agreed at its creation were heavily biased in favour of the priorities of rich countries to the detriment of poorer developing countries, and attempts to rectify this bias have been unsuccessful.

Many African countries believe the organisation sidelines African priorities. Key issues such as rich-world agricultural subsidies undercutting Africa's farmers, the failure to facilitate the development of local value chains on the continent, inflexible positions on patent waivers for medicines or green technologies, rules against stockpiling that would increase food security, and the high costs of the dispute settlement mechanism are all points of contention.

Additionally, the 2001 Doha round of negotiations, intended to recentre the WTO on development objectives, was never completed, and WTO treaties are increasingly infringing on domestic policy space. The WTO has been accused of 'kicking away the ladder' by preventing developing countries from employing the 'protectionist' policies rich countries themselves employed while industrialising.

### **The World Bank/IMF 2023 Spring Meetings: disappointing seen from Africa?**

Key themes of the Spring Meetings included the ongoing fallout of COVID-19 and the war in Ukraine, global inflation, the sovereign debt crisis, the need for more climate finance, and 'economic fragmentation'.

Key issues for the continent such as reform of the quota based voting system, dollar dominance of the financial system and issues with credit rating agencies were either not discussed or pushed to the side-lines.

The much-highlighted issue of 'economic fragmentation' and 'friend shoring/near shoring' felt dismissive of initiatives in the Global South to develop more local and regional supply chains, and improve national security, in the wake of COVID-19 and the conflict in Ukraine.

A lack of clarity remains over the World Bank's core mission, with many developing countries critical of the proposed pivot towards global public goods, away from development/poverty alleviation.

#### **Key take-aways**

- Little talk about reform of Bretton Woods voting systems.
- Focused on increasing finance, rather than global financial system reform.
- Global Sovereign Debt Roundtable did not deliver decisive results.
  - China yet to drop demand that MDBs take haircuts on outstanding debt.
  - IMF and World Bank indicated willingness to provide more concessional and grant financing as an alternative to haircuts on existing debt.
  - Private sector creditors still dragging their feet on debt relief in Zambia.
- Much talk, but little in the way of concrete financial commitments.
- Capital increase for the World Bank or additional issuance of SDRs ruled out by US.

***“A Breakthrough for People and Planet”***

Appointed in March 2022 by the United Nations Secretary-General (UNSG) to advise Member States on the needed reforms to global governance in the lead up to the 2024 Summit of the Future, the High-Level Advisory Board on Effective Multilateralism (HLAB) is co-chaired by former President of Liberia, Ellen Johnson Sirleaf and former Prime Minister of Sweden, Stefan Löfven. The HLAB Report, *A Breakthrough for People and Planet*, published on 18 April 2023, outlines an ambitious plan to strengthen the multilateral system around six “transformational shifts” and calls for a renewed effort to reform the UNSC, strengthen the UN peacebuilding architecture and broaden relations between the UN and regional organizations.

The six transformational shifts are:

- Rebuilding trust in multilateralism – through inclusion and accountability.
- Regaining balance with nature and providing clean energy for all.
- Ensuring abundant and sustainable finance that delivers for all.
- Supporting a just digital transition that unlocks the value of data and protects against digital harms.
- Empowering effective, equitable collective security arrangements.
- Managing current and emerging transnational risks.



**Japan’s government  
invited the African Union  
to the forthcoming G7  
summit in May 2023,  
instead of regular  
attendee South Africa**

### The BRICS: a competitive alternative?

After the grouping concept was coined in 2001, the 4 initial members – Brazil, Russia, India and China – held their first Summit in Yekaterinburg (Russia) in 2009. They were joined by South Africa in 2010.

As such, the BRICS already account for over one quarter of global GDP (26.1%) in 2023 and over 40% of global population.

As many as 23 countries in the Global South, and at least seven in Africa (Algeria, Egypt, Nigeria, Senegal, Sudan, Tunisia, and Zimbabwe), have expressed interest in joining the BRICS. If all were to be admitted, the BRICS bloc could represent over one third of global GDP and over 60% of the global population.

To many members of the Global South, the BRICS system appears an increasingly attractive alternative to the current Bretton Woods system, that fails to address adequately their demands.

- The '**New Development Bank**', headquartered in China, has been established in 2015. It was launched with \$50 billion in capital and a \$100 billion reserve currency pool. In 2021, Egypt, Uruguay and Bangladesh took up shares.
- The Bank has already issued green financial bonds in Renminbi, with a first issuance of RMB 3 billion in 2016.
- A **Contingent Reserve Arrangement** has been created to support members struggling with payments. The lending process will be on the next Summit agenda.

The BRICS have also engaged in discussions about the creation of an **alternative reserve currency** to counter dollar dominance in trade, while an **integrated BRICS payment system** has also been discussed.

**Chapter 01. Africa in the world: vast potential and key assets, with hurdles to overcome**

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## Chapter 02. Africa in the world: vast potential and key assets, with hurdles to overcome

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### Chapter 03. Africa's voice in the current multilateral architecture

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AATI	African Agricultural Transformation Initiative	FARM	International Food and Agriculture Resilience Mission
ACDEG	African Charter on Democracy, Elections and Governance	FDI	Foreign Direct Investment
ACE	Africa Center of Excellence	FOCAC	Forum on China-Africa Cooperation
ACMI	African Carbon Markets Initiative	GAFS	Global Alliance for Food Security
ACP	African, Caribbean and Pacific Group of States	GHG	Greenhouse Gas
ACSS	African Center for Strategic Studies	HCP	Human Capital Project
AfDC	Africa Centers for Disease Control	HLWG	High-Level Working Group
AfCDFTA	African Continental Free Trade Area	HLAB	High-Level Advisory Board
AFINDEX	Africa-India Field Training Exercise	IAFS	India-Africa Forum Summit
AFRICOM	United States Africa Command	IBRD	International Bank for Reconstruction and Development
AGOA	African Growth and Opportunity Act	IDA	International Development Association
AGRA	Alliance for a Green Revolution in Africa	ID4D	Identification for Development
ALN	African Leaders for Nutrition	IFAD	International Fund for Agricultural Development
APSA	African Peace and Security Architecture	IFC	International Finance Corporation
ATDC	Agricultural Technology Demonstration Center	IFI	International Finance Institutions
AVATT	Africa Vaccine Acquisition Task Team	IIAG	Ibrahim Index of African Governance
BMGF	Bill & Melinda Gates Foundation	ILO	International Labour Organization
BRI	Belt and Road Initiative	IMF	International Monetary Fund
BRICS	Brazil, Russia, India, China, South Africa	ISS	Institute for Security Studies
BRICS NDB	BRICS New Development Bank	JICA	Japan International Cooperation Agency
CAADP	Comprehensive African Agricultural Development Programme	LSF	Liquidity and Sustainability Facility
CAP	Common Agricultural Policy	MCC	Millennium Challenge Corporation
CCP	Chinese Communist Party	MDB	Multilateral Development Bank
CF	Common Framework	MERCOSUR	Southern Common Market (Mercado Comun del Sur)
CHE	Current Health Expenditure	MEUR	Million Euros
DSSI	Debt Service Suspension Initiative	MF	Mastercard Foundation
DTA	Digital Transformation with Africa	MINT	Mexico, Indonesia, Nigeria and Turkey
EAC	East African Community	MINURSO	United Nations Mission for the Referendum in Western Sahara
ECOWAS	Economic Community of West African States	MONUSCO	United Nations Organization Stabilization Mission in the Democratic Republic of Congo (Mission de l'Organisation des Nations Unies pour la stabilisation en République démocratique du Congo)
EIB	European Investment Bank	NDICI	Neighbourhood Development and International Cooperation Instrument
EPF	European Peace Facility	NEPAD	New Partnership for Africa's Development
EUISS	European Union Institute for Security Studies		
FAO	Food and Agriculture Organization of the United Nations		

ODA	Official Development Assistance	UNGA	United Nations General Assembly
OECD	Organization for Economic Co-operation and Development	UNISFA	United Nations Interim Security Force for Abyei
OIC	Organization of Islamic Cooperation	UNMISS	United Nations Mission in South Sudan
OIF	International Organisation of la Francophonie (Organisation Internationale de la Francophonie)	UNPKM	United Nations Peace Keeping Mission
OPEC	Organization of the Petroleum Exporting Countries	UNSC	United Nations Security Council
OSF	Open Society Foundations	UNSG	United Nations Secretary-General
PAPSS	Pan-African Payment System	USMCA	United States-Mexico-Canada Agreement
PASET	Partnership for Skills in Applied Sciences, Engineering and Technology	VCM	Voluntary Carbon Market
PAU	Pan-African University	WB	World Bank
PIATA	Partnership for Inclusive Agricultural Transformation in Africa	WBG	World Bank Group
PPG debt	Public and Publicly Guaranteed debt	WFB	World Food Programme
RST	Resilience and Sustainability Trust	WTO	World Trade Organization
SADC	Southern African Development Community		
SDG	Sustainable Development Goal		
SDR	Special Drawing Rights		
SIFA	Skills Initiative for Africa		
SSA	Sub Saharan Africa		
TABEF	Turkey Africa Economic and Business Forum		
TICAD	Tokyo International Conference on African Development		
TIKA	Turkish Cooperation and Coordination Agency		
UNAIDS	Joint United Nations Programme on HIV and AIDS		
UNCCD	United Nations Convention to Combat Desertification		
UNCTAD	United Nations Conference on Trade and Development		
UNDESA	United Nations Department of Economic and Social Affairs		
UNECA	United Nations Economic Commission for Africa		
UNEP	United Nations Environment Programme		
UNESCO	United Nations Educational, Scientific and Cultural Organization		

This report puts together the main data-driven facts and figures about the place of Africa in the world and the world in Africa. The focus of this report is to help inform Africa's position within the multilateral system with respect to key topics including the economy, security and traditional development issues. This research publication does not intend, by any means, to be exhaustive. The topics and data selected are those that the Mo Ibrahim Foundation (MIF) finds the most relevant.

This report makes use of the latest available data from a wide range of sources. A reference list containing all the sources used for this document is provided at the end of the report. Sources used are not always the primary data sources.

Each graph is accompanied by their respective data source. Where necessary, additional notes on the data used are also provided throughout the report.

Data included in the report was correct at source at the time of research (the last access date for each variable is provided in the references). In some cases, the numbers may not add up to the total due to rounding.

This report provides comparisons of regional averages. The composition of regions may vary according to source. When data in the report is presented disaggregated for Northern African and sub-Saharan African countries, this is done reflecting the choices made at source.

African averages are, in most cases, taken directly from source. If they have been calculated for the purpose of this report, they are unweighted. As not all sources provide data for the 54 African countries, some averages may not include data from all countries. Please see the sources for full details.

Data for Morocco may or not may include Western Sahara depending on the source.

The Ibrahim Index of African Governance (IIAG), which is featured several times throughout this report, is a composite index which gives a statistical measure of governance performance in 54 African countries, produced by MIF. The 2022 IIAG, its latest iteration, covers a ten-year time period from 2012 to 2021. Compiled by combining 256 variables from 47 independent African and international data sources, the 2022 IIAG is the most comprehensive collection of data on African governance. To download all IIAG resources and datasets, please visit: <https://iiag.online/downloads.html>

Trade data in the report is predominantly sourced from the United Nations Conference on Trade and Development database (UNCTAD STAT) that produces more than 150 indicators and statistical time series essential for the analysis of: international trade, economic trends, foreign direct investment, external financial resources, population and labour force, commodities, information economy, creative economy and maritime transport. Exports and imports data may not be in line with each other due to differences in the compilation methodology.

External debt figures in the report are sourced from the International Debt Statistics (IDS) database. The database is updated annually with the release of the World Bank's International Debt Report (IDR) and provides policymakers and analysts aggregate and country-specific information on trends in external debt in low- and middle-income countries since 1951. Total public external debt stock in the report refers to the sum of all public and publicly guaranteed external debt, in addition to use of IMF credit. Special Drawing Rights (SDRs) values are subtracted from the use of IMF credit. Debt service is calculated through the debt service on external debt, public and publicly guaranteed in addition to IMF repurchases and charges.

Figures pertaining to Official Development Assistance (ODA) were shared directly with MIF by the Organisation for Economic Co-operation and Development's Development Assistance Committee (OECD DAC statistics) on 5 April 2023 and were sourced from the OECD's Creditor Reporting System (CRS) database.

Unless stated otherwise Gross Domestic Product (GDP) data has been collected from the International Monetary Fund's (IMF) World Economic Outlook October 2022 dataset. For representation of international groups' GDP at date of creation in Chapter 3, World Bank data was used as IMF data only goes back to 1980, as such these data points are treated as proxies and are not directly comparable.

Figures calculated using IMF Fiscal Monitor variables including 'Gross debt position', referred to in this report as debt-to-GDP ratio, and 'Expenditure % GDP', used variables from the October 2022 edition of Fiscal Monitor.

Unless stated otherwise, population statistics are taken from the 2022 revision of the World Population Prospects from the United Nations Department of Economic and Social Affairs (UNDESA). For population projections, mid-year medium variant estimates are used. For 2023 population data, January 1<sup>st</sup> medium variant estimates are used.

Dollars (\$) are US dollars unless indicated otherwise.

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