Africa holds weak and strong cards

to deal with the challenges of poverty on the continent

-- by Martin Nicol

MARTIN NICOL's thought piece on the economic challenges facing Africa was presented at a seminar at the University of the Western Cape (UWC) on 19 July 2024 as part of the 'Changing Political Economy of Africa' project. This was a collaboration between UWC's Institute for Social Development (ISD) and the Institute for African Alternatives (IFAA), sponsored by the National Institute for the Humanities and Social Sciences (NIHSS) to build research capacity and encourage dialogue among African scholars.

Twenty-five years ago, as a not-so-young economist, I worked as a diplomat for South Africa to promote trade and investment with Canada and the UK. We did not often meet with our African counterparts, as we were competitors, all trying to win over the same foreign investors and purchasers of our exports. In any event South Africa was not popular. It did not even get support from the rest of Africa when it bid to host the 2004 Olympic Games in Cape Town.

One exception was in 2000, when Canada organised "Africa Direct" – a week-long early example of an "Africa plus one" event where a rich country (such as Japan,[1] China,[2] Russia, even Italy[3]) calls for an economic or diplomatic meeting with "Africa" (see Usman, 2023; Soule, 2021). The rich country sets the agenda and chooses the venue, and all the African delegations come, cap in hand.

At the Canadian event, South Africa presented itself as a beacon of competence on the continent, 'the gateway to Africa', with a modern economy and a world-class financial sector. Nigeria, on the other hand, said "Look how terrible things are in Nigeria – never any electricity when you need it, an economy in chaos. You can see how very badly we need Canada to help us." That same week, as the Africa Direct road-show toured from Toronto to Calgary and Ottawa, The *Economist* – an international business newspaper – came out with a brutal cover: a deathly-armed African soldier within a cut-out map of Africa and a tag-line – *The hopeless continent*.

The Canadians were unimpressed, and with good reason, because they were the first to pick Africa as a place of opportunity at that time. Over the following decade, African economies grew faster than all others (except for China). Off low bases, Mozambique and Ethiopia led the growth. The *Economist* cover stories were headed "Africa rising" in 2010 (with a child flying a rainbow kite) and "Aspiring Africa" in 2013 (featuring a giraffe with an ultra-extensive neck).[4] It did not last. The most recent *Economist* cover is not about economics at all, but about Africa losing faith in democracy (with an image of Africa on a bullet-pierced road sign for a U-turn – 7 October 2023.)

The reader may find these thoughts on Africa's economic challenges in 2024 disappointingly general. But they must form the base for any appreciation of the economic prospects for the continent, a huge place of contrast and potential, where each country expresses its own agency in a changing world order.

Poverty is Africa's main economic challenge. Extreme poverty is defined as living below the International Poverty Line of $2.15 (about R35) per day. Poverty profiles vary as much within each country as between them, but the overall poverty picture sets Africa apart from the rest of the world. In 2021, 78% of people in Africa were unable to afford a healthy diet, compared to 42% in the world as a whole (and just 3% in developed countries).[5] Many countries have succeeded in tackling poverty, and in reducing it significantly. The economic challenge is to improve the standard of living for people in Africa.

African countries hold both weak and strong cards for dealing with poverty in 2024. Each poverty profile is obviously particular, so generalisations are perilous. However, as this is a 'think piece' not a full survey, we can consider just three of each:

Weak cards – which make it hard for Africa to turn back poverty

Low productivity

Productivity – the amount of output per unit of input – is low in much of Africa because of poverty. People suffer more from health problems and disease and have less access to education than on any other continent. Unreliable or non-existent electrical power hampers the adoption of new technology. Bad roads, broken rail-links and generally weak communications all impede economic progress. Production levels are lower still because of unemployment and a lack of investment.

Heavy debt burden

Many African countries bear a heavy burden of debt. This is caused both by poor governance and by bad luck. The implications are that the cost of future borrowing is very high, if loans can be raised at all, and large parts of government revenues are diverted to service debt instead of going towards investment or service delivery.

There is a lot of hope – and hype as well – attached to the agreements for an AfCFTA.

Insecurity

Insecurity disrupts the prospects for families and for business generally. It takes multiple forms, from criminal economies, insurgency and war to the uncertainties that flow from corruption and the absence of the rule of law. Africa has millions of people displaced by internal conflicts. Add to this the insecurity of food and water from climate disasters.

Strong cards – could make a difference in development

Natural resources

With 18% of the world population, Africa possesses around 30% of the world's mineral resources (*Economist*, 2024b). Extraction of raw products for export is the main activity at present. But this could be repurposed to support more development in the host regions by moving up the value chain. Historical legacies do make this more difficult. The energy transition is going to intensify extractivism: "an average electric vehicle requires six times the amount of minerals as a conventional car … an onshore wind turbine requires nine times more mineral resources than a gas-fired power plant" (Dawson, 2024: Introduction at note 54). As demand for minerals intensifies, African countries have huge opportunity.

Human resources

African countries have more young people because of high birth rates. There is a need to train and educate increasing numbers to be able to take advantage of this "demographic dividend" compared with other countries. More people are also clustered in growing cities that concentrate talent and opportunity.

Opportunity to learn lessons from successful development elsewhere, and skip ahead

To adopt the argument of the Nigerian banker at the Ottawa engagement I referred to earlier, the very fact that African countries are lagging last shows that they could do better. Leading countries prove this. There is huge space for improvement. Others have succeeded, so can Africa. Coming late allows access to technology and experience that other countries came to only gradually. Computers, digital technology and advances in artificial intelligence can provide tools that other countries did not have access to on their development journeys (Humeau & Deshpande, 2024). This is also, and most particularly, the case with electrical power, where the cost of generating electricity, and the cost of having it available everywhere, has fallen dramatically in the last five years alone. Another key lesson is how better nutrition for pregnant women and for children in infancy has significant advantages for intellectual development and health in later life.[6] Relatively small investments here generate huge economic and social returns. These can be all the more valuable in a continent with a growing population.

Africa in the world

It is a striking fact that in 2024 the total population of Africa is very close in size to that of the largest and second largest countries in the world, India and China. It is also of interest that Africa, with its 54 countries, has a total population that is similar in size to the 38 rich and developed countries who are clubbed together in the Organisation for Economic Co-operation and Development (OECD).[7] The table below of population estimates can tell a multitude of stories.

Table 1: Africa and world population estimates – 2023/4[8]

Countries		Population 2023	Yearly Change	Net Change	Density (P/Km²)	Area (Km²)	Migrants (net)	Fertilty Rate	Median Age	Urban Pop %	World pop. Share
54	Africa /AU	**1,460,481,772**	2.37%	33,745,467	49	29,648,481	-535,151	4.2	19	45%	18%
1	India	**1,428,627,663**	0.81%	11,454,490	481	2,973,190	-486,136	2.0	28	36%	18%
1	China	**1,425,671,352**	-0.02%	(215,985)	152	9,388,211	-310,220	1.2	39	65%	18%
38	OECD	**1,384,817,871**	0.01%	139,081	39	35,628,189	488,694	1.5	41	82%	17%
100	Other	**2,345,710,766**	1.08%	25,058,076	33	71,301,929					29%
194	**World**	**8,045,309,424**	0.88%	70,181,129	54	148,940,000		2.4	31	57%	100%

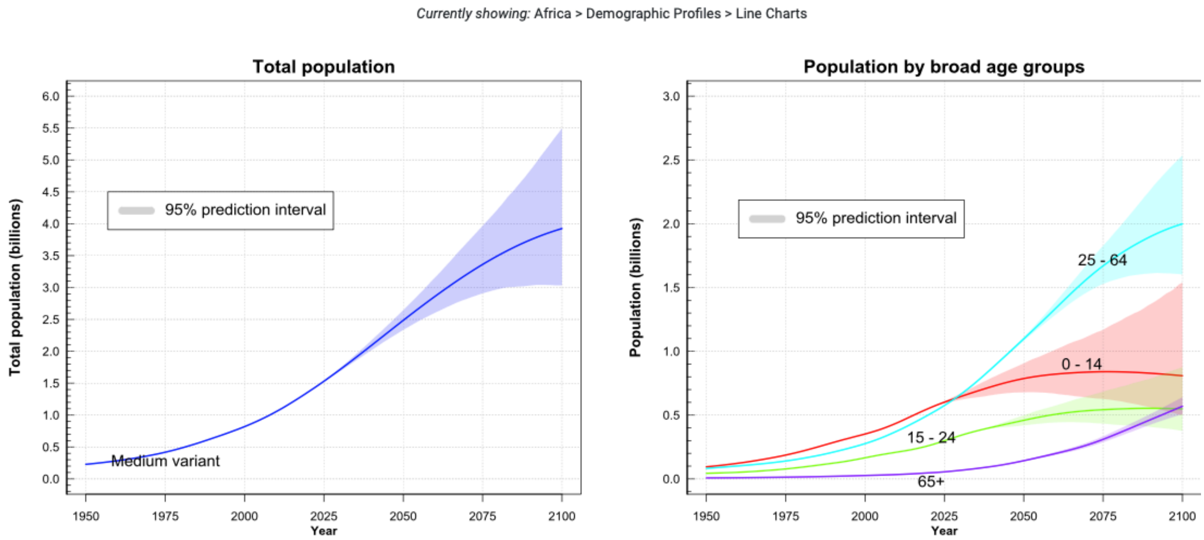
First, one notices the great annual population increase in Africa, compared with India, China, the OECD and the remaining 100 countries in the world. This explains the low median age of 19 years in Africa. (The median means that half of all Africa's people are older than 19 and half are younger than 19.) The young profile and the fast population growth are due to the fertility rate. A Total Fertility Rate (TFR) of 2.1 represents the Replacement-Level Fertility, which is the average number of children per woman required for each generation to exactly replace itself without needing international immigration. A value below 2.1 will cause the native population to decline.[9] It is below this level in India, China and in the OECD countries. Their populations will (or are) declining from peak levels and their populations are getting older.

Second, one can see the flow of migrants from poorer countries to richer countries. Third, there is internal migration from rural areas into cities. These global trends condition both geo-political and economic trends across the world. Africa – particularly if it is better united and integrated – can be a huge force in the world in the future.

Two pivotal issues for economic development in Africa

Let us look in a little more detail at two features that will impact on Africa's economic profile and prospects: demography and electrical power.

Figure 1: Africa: demographic 'dividend' – more young people[10]



The continent's working age population is expected to double by 2050, accounting for 86% of the total global increase (AUC/OECD, 2024:9). The graph on the left shows the total population of Africa is expected to grow from the present 1.4 billion to 2.5 billion by 2050. The graph on the right shows a huge, sharp growth over this period in the number of people in Africa aged 25 to 65 years. This 'working age' population doubles from 500 million to just over one billion by 2050. This is an extraordinary number of people needing education and jobs. It is also an extraordinary potential boost for African economies if they can provide productive work for them.

The challenges are the provision of education and decent employment. The African Union Commission (2024:9) talks of "an unprecedented pool of talent". But without other opportunities, crime, drugs and migration beckon. A total of 17% of tertiary-educated individuals born in Africa lived abroad in 2020 (AUC/OECD, 2024:43). There is lots of high-skilled emigration from Africa to high-income countries but, at the same time, there is a lack of high-skilled migration within Africa (AUC/OECD, 2024:33). Free movement of African people is not part of the talked up plans for free trade in Africa under the agreements for an African Continental Free Trade Area (AfCFTA). Over 80% of African youth in school aspire to work in high-skilled occupations, while few – only 8% – are able to find such jobs (AUC/OECD, 2024:47).

Africa's unprecedented pool of talent will stagnate if it is not refreshed, and it will be there for no developmental purpose if its potential is not properly used. But it is there, and is growing every day – it can be the defining advantage to improve standards of living in Africa.

Solar-powered future for Africa

Economic progress depends on power. But Africa's use of electricity – the critical form of power for modern technology and for lighting, temperature control and cooking – is astonishingly low across the continent: 603 kilowatt-hours per capita in 2020.

Table 2: Electricity comparisons – Africa and the rest

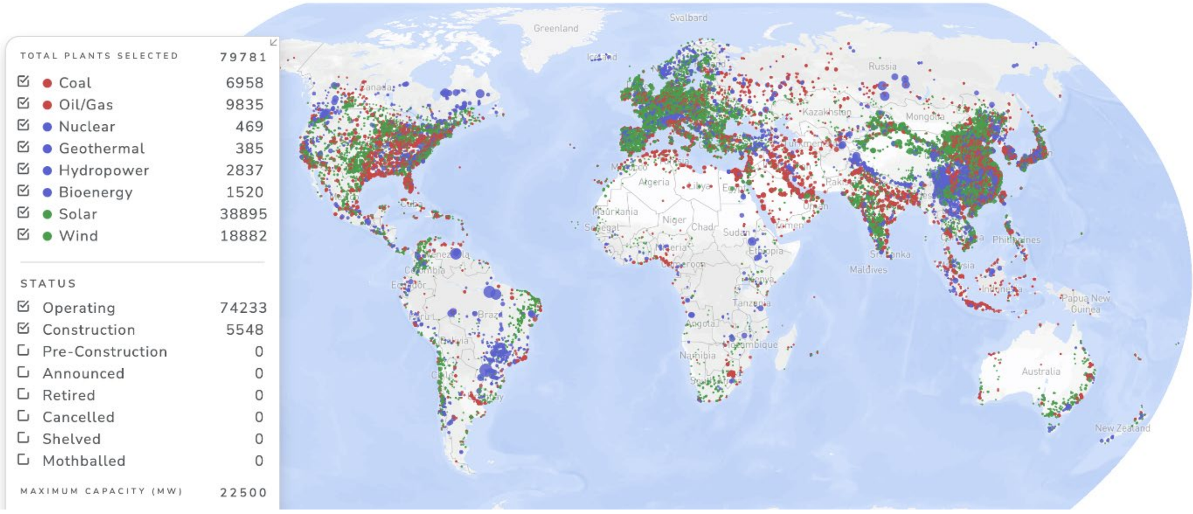
	Population 2020	Total electricity generation in gigawatt-hours (GWh), 2020	Electricity generated per capita 2020 KWh
India	1,342	1,621,136	1,208
China	1,425	7,779,070	5,459
OECD	1,370	10,924,720	7,972
Africa	1,359	819,225	603
World outside Africa	6,436	25,787,827	4,007
World	7,794	26,607,052	3,414

Author's calculations from AUC/OECD, 2024:249, Table 26; Wikipedia: Electricity_sector_in_India; and https://ourworldindata.org/energy/country/china

International data that report greatly improved electricity access in Africa is misleading, partly because the minimum that counts as "access" is extremely low (and it may be intermittent!) and because it reflects greater urbanisation. Electricity is not available outside towns.[11] In the last five years the potential for spreading access to electricity everywhere in Africa has utterly changed. Decentralised, commercially driven solar power could transform African economies. I am specifically not referring here to the "just transition" away from fossil fuels. I am pointing to new access to a form of electrical power never previously available. You can call it part of "the green economy" if you want to, but that is beside the point.

Costs of solar systems have plummeted. Between 2019 and 2023 the cost of photovoltaic (PV) cell panels fell by 15%, and the cost had already declined by almost 90% in the 2010s. Battery storage systems now cost about half as much as five years ago. "Distributed renewable energy" (DRE) can connect to micro-grids that provide electric power to local areas. There is no call for prohibitively expensive national reticulation schemes, with pylons looping cables between huge transformers (*Economist,* 2024a). Electricity is the magical power that can give all parts of Africa access to modern technology and devices to improve productivity. The real possibility for actual transformative change is shown in the world map below, from the web site of the Global Energy Monitor Integrated Power Tracker.

Figure 2: Representation of electrical power generation capacity – July 2024



Source: Global Energy Monitor | Global Integrated Power Tracker. Creative Commons Attribution 4.0 International Public Licence at https://globalenergymonitor.org/projects/global-integrated-power-tracker/tracker-map/

The map has an overlay that represents the electricity generation capacity of 79,781 power stations from unit-level information on their size and fuel source (red for fossil fuels; blue for nuclear, geothermal, bioenergy and hydro; and green for solar and wind). The point of the illustration is to emphasise the lack of electrical power today in Africa, and how Africa lags behind compared to the rich OECD countries, China and India. Also look at Indonesia, the fourth most populous country in the world. The map suggests how very transformative it could be for African economies if solar power – supported by batteries – could be widely adopted. There is no doubt that this would incentivise and accelerate economic activity and improve the standard of living of people in Africa.

"Soviets plus electrification equals Communism" was a slogan in the early years after the Bolshevik Revolution in Russia. Promoted by Lenin, the impulse was to combine worker-directed government with the heavy industry that had produced significant economic growth in the rest of Europe, Japan and the USA.[12]

Figure 3: "Communism is Soviet power plus the electrification of the whole country"

This slogan appeared on a huge sign on the banks of the Moscow River opposite the Kremlin in 1921. Could it be appropriate now, a century later, to re-constitute the slogan for Africa? Heavy industry is not the starting point, but it is electrification, powered by the African sun. Soviets, however, would be a hard sell! Worker organisation in Africa is weak and discouraged.

The excellent historian of Africa, Kevin Shillington (2019), has written, "it is only with stable government, answerable to the people, that there is any hope of real economic and social benefit for the mass of the African population."

That gives us "Solar power plus stable government, answerable to the people, can move Africa forward, past poverty."

*Source: https://soviethistory.msu.edu/1921-2/electrification-campaign/electrification-campaign-images/#bwg35/340 *

Evaluating economic challenges in Africa

Some of the best sources of writing and research on Africa and its economic development challenges are held captive behind inaccessible paywalls or are available only in incredibly expensive books. There may be no option but to use open-access literature from the internet. It is vital to read widely and critically, the more so because it is so easy for bad actors or people with narrow agendas to package and post on internet sites. Conspiracy theories abound, and there is no attractive, interesting and incorrect interpretation without an apparently excellent source.

Africa may have a higher population than China, but it is 54 countries, not one. So be careful when making generalisations. Regions can be so different, so can countries. Above all, always look for 'African agency'. For every Chinese company spiriting cassiterite out of Dar Es Salaam, there is a multinational company based in Zurich or the Bahamas doing the same thing—and all operate together with African actors and enablers. Instability and insecurity also attract business. Artisanal mining under terrible conditions occurs across much of Africa. Local warlords and crime bosses benefit far more than they would from a stable government that is able to enforce the rule of law. Local politics have a strong effect on economic activity, as has always been the case. And there are leaders of neighbouring states with their own motivations. Zero sum games abound.

This thought piece originated in a presentation for researchers working on a project sponsored by NIHSS. Colleagues have pointed out two key areas they found missing. The first has to deal with African agency, the second the opposite.

Boosting intra-Africa trade

There is a lot of hope – and hype as well – attached to the agreements for an African Continental Free Trade Area (AfCFTA). What could make better sense than for African countries to trade with each other? Trade openings will help economies to diversify, becoming more resilient and richer in the process, with huge impacts for improved incomes and poverty reduction. A 2023 booklet from the AfCFTA secretariat leads the hype:[13]

> *The economic integration of our continent is not merely an abstract concept, it is a tangible vision with profound implications for the hearts and minds of every African citizen. It is an opportunity to break the shackles of fragmentation, overcome historical divisions and rise as a united force on the global stage. It is an invitation to chart a new path of self-reliance, self-determination, and self-sufficiency. Through the AfCFTA, we aim to … promote regional value chains, encourage the export of our homegrown products, ultimately reducing our reliance on external markets. By embracing the spirit of intra-Africa trade, we can stimulate industrialisation, bolster agricultural productivity and improved standards of living for our people.*

AfCFTA has an active and digitally sophisticated secretariat which is making bold efforts to accelerate progress in this very complex project – their work merits admiration and support. But there is a huge gap between an agreement (even if it is widely ratified) and reality. Optimistic projections say that AfCFTA will boost Africa's intra-continental exports by more than 81% by 2035. But "the crucial factor for substantial outcomes lies in the removal of non-tariff barriers (NTBs) and implementation of trade facilitation measures" (Mofu, 2024).

The secretariat itself says: "African businesses face non-tariff barriers (NTBs) when trading goods across intra-African borders, including excessive delays, ad hoc fees, cumbersome document requirements, and restrictive product standards and regulations. These NTBs hinder trade and limit economic growth within the continent."[14] Standard Chartered (2023), a multinational bank, has highlighted reservations on the likelihood of the AfCFTA being implemented successfully. "African markets face complex and uncertain trade rules, poor governance, underdeveloped infrastructure, and high costs of capital."

Specifically in the case of Angola, a recent analysis has said: "The poor quality of road infrastructure will further make it difficult for Angola to integrate its economy in the region and thus dampen the economic ambitions of the AU on free trade across Africa" (Mphigalale, 2020:151). In principle, it is perfectly possible to build roads and railways and solve the infrastructure weaknesses. However, increasing trade between the 54 countries of Africa also requires political will – a scarce commodity across the continent. Conflicting national and regional objectives limit market access and hamper efforts to build integrated regional value chains. The AfCFTA is a hopeful indicator for African agency, but not yet a strong card for Africa's development (Erasmus and Hartzenberg, 2024).

Fending off boarders

There is renewed international strategic interest in Africa, not only because it has critical minerals needed for the green transition. Resources are identified as a strong card for Africa's development. But what of the dangers that they get stolen (again!)? India and China are growing ferociously and need resources. So do western countries. China is certainly winning the competition to build strong economic and political relations with African countries. More African heads of state went to China's recent Forum on China-Africa Cooperation (FOCAC) meeting in Beijing than attended the United Nations opening this year. China is Africa's biggest trading partner, but the balance is in China's favour – and, as always, it is raw materials out (from rare rosewood and cobalt to avocados and fish) and manufactured goods in (from cell phones and cars to garments and plastics).

In 2006, South African President Thabo Mbeki warned, on his return from an earlier FOCAC meeting in Beijing, that Africa would need to tread carefully in dealing with China. The continent had to avoid a replication of Africa's historical relationship with its former colonial powers. This would occur if African countries just exported raw materials to China while importing Chinese manufactured goods (Nicol, 2022). China has had a strategy for dealing with Africa that pre-dates the Xi era. Africa has yet to formulate a strategy for dealing with China and to leverage its resources for greater benefit than before. Several international mining companies are in partnership with Chinese mining companies.[15] In the DRC and Zambia they will soon be able to choose to turn west to export copper through the newly US-financed Lobito Corridor in Angola, or east to send it via the port of Dar es Salaam – either by road or on the Tazara railway, which China is planning to rehabilitate. (Until then it is the long road to Walvis Bay via the Caprivi Strip, or the longer road to congested Durban.)

China and the US are by no means the only players. Russia and remnants of the Wagner Group accumulate spoils in the Central African Republic and across the Sahel. Turkiye has been establishing new diplomatic missions across the continent. Geopolitical interest in Africa is keen from the former colonising powers in Europe and also from India. India skilfully used its 2023 presidency of the G20 – the world's premier economic co-ordination body – to secure the inclusion of the AU as an international member, alongside the European Union.

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ENDNOTES

The number of countries in the world, their borders and their status, is under dispute. The AU covers all 54 countries of Africa, from Nigeria (number one in population) to the Seychelles (number 54). There are disputes over Western Sahara (Saharawi Arab Republic, which is recognised by the AU, but governs no country) and over Somaliland (which is not recognised by the AU, but governs its territory on the horn of Africa). The UN has 193 members. Palestine is an observer – counted in *Figure 1* as number 194.

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[1] Japan was the initiator of this trend with the first Tokyo International Conference on African Development (TICAD) in 1993. TICAD9 will be in Yokohama in 2025.

[2] China established the Forum on China-Africa Cooperation (FOCAC) as the key institution shaping Africa-China relations with a major event in Beijing in 2006, attended by 50 African leaders. FOCAC meets every three years – alternating between Beijing and African venues (Nicol, 2022).

[3] Italy hosted the Italy-Africa summit in Rome, January 29, 2024. The AU and 45 African countries attended.

[4] https://spectator.clingendael.org/nl/publicatie/afrikas-economische-vooruitgang-misverstanden-en-feiten. Also see Bond (2017) for an alternative perspective.

[5] See FAO *et al*., 2023, pgs 207-211, Table A3.1. The method to assess the affordability of a healthy diet was updated on 24 July 2024. The revised data still show African countries have almost double the percentage of people unable to afford a healthy diet compared with the world as a whole. Also see FAO *et al*., 2024: Box 4.

[6] See Economist (2024c).

[7] The OECD is a club of 38 rich countries in North Ameria and Europe and including Japan, Australia and Chile.

[8] Data from the Population Division of the Department of Economic and Social Affairs of the United Nations Secretariat, July 2023-July 2024 estimates from the 2022 U.N. Revision via https://www.worldometers.info/world-population/population-by-country/ and https://www.worldometers.info/world-population/
OECD fertility rate: https://www.oecd.org/en/publications/2024/06/society-at-a-glance-2024_08001b73.html
OECD median age was 40.8 in 2020: https://doi.org/10.1787/f7f135c1-en
OECD urban population was 82% in 2023: https://data.worldbank.org/indicator/SP.URB.TOTL.IN.ZS?locations=OE.
World urban population was 57% in 2023: https://data.worldbank.org/indicator/SP.URB.TOTL.IN.ZS
Fertility rate see https://en.wikipedia.org/wiki/Total_fertility_rate#/media/File:Total_Fertility_Rate_Map_by_Country.svg.
For the population in a given area to remain stable, an overall total fertility rate of 2.1 is needed, assuming no immigration or emigration occurs.
World median age 30.5 2023: https://www.worldometers.info/demographics/world-demographics/#median-age

[9] https://ourworldindata.org/fertility-rate

[10] UN Department of Economic and Social Affairs :Population Division – World Population Prospects 2024 at https://population.un.org/wpp/Graphs/DemographicProfiles/Line/903 (accessed 15 July 2024.

[11] "Having access to electricity is defined in international statistics as having an electricity source that can provide very basic lighting, and charge a phone or power a radio for 4 hours per day." (Roser, 2020) The AU provides this data: Percentage of population with access to electricity, 2020, Urban: 82.23%, Rural: 35.94%, Africa total: 56.09% (AUC/OECD, 2024: 249 Table 26).

[12] Sources are elusive but see Carlin, Schaffer and Seabright (2013) and Geronin (1958). The traditional authority is EH Carr.

[13] https://au-afcfta.org/wp-content/uploads/2023/11/ENGLISH-FACTSHEET-BOOKLET-.pdf

[14] https://www.tradebarriers.africa/

[15] See the excellent work of The China-Global South Project (CGSP), formerly known as The China Africa Project at https://chinaglobalsouth.com/podcasts/

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