AFRICAN MEGATRENDS

LOOKING OVER THE HORIZON INTO THE FUTURE

Olli Ruohomäki

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- There are seven megatrends shaping the future of Africa. These include population growth, urbanization, climate change, democratization, protracted conflict, connectivity and geopolitical competition.

- The sustainability of positive developments in Africa is somewhat tenuous and uneven. There are both prospects for peace and prosperity, as well as instability and insecurity across the vast and diverse continent.

- The young population wants to have a say in the direction that the future takes, and this may affect the course of the continent's developments, particularly vis-à-vis the development of democracy. There are possibilities for leapfrogging in some fields, as exemplified by digital connectivity.

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INTRODUCTION

Africa is an enormous continent composed of several regions and 54 states, populated with more than 1.3 billion people. There are more than 1,500 languages and diverse cultures. Both low-income and high-income countries and disparate levels of development are found on the continent.

There is both concern and hope in the air regarding the trajectory that Africa's development will take. Dwelling solely on negative news about conflict, political turmoil, hunger and refugees is not constructive. Neither is seeing Africa through 'rose-tinted glasses' as a continent full of promise for trade and investment prospects. Rather, a balanced and realistic vision that looks over the horizon into the future is required.

Talking about the diverse and vast continent as a whole is fraught with potential accusations of sweeping generalizations and even arrogance. Nonetheless, this is exactly what the business of forecasting is all about. To put it another way, predicting the future is essentially about painting the canvas with broad strokes and seeing the big picture. It is then up to area studies, sociology, anthropology, political science and similar disciplines to dwell on the more nuanced and detailed case studies.

Hence, despite the complexity that forecasting the future of Africa entails, it is possible to outline the main contours of the trajectory of change that informs the course of developments on the continent.[1] It is with this in mind that this Briefing Paper examines seven megatrends that are shaping the future of Africa, namely:

• Rapid population growth
• Dysfunctional urbanization
• Climate change
• Resilience of neo-patrimonial politics and slow democratization
• Protracted conflict
• Attempts at connectivity and unlocking trade potential
• A new scramble for Africa

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[1] The author of this paper is inspired by the authoritative work of leading South African scholar Jakkie Cilliers, who in his recent book *Africa First! Igniting a Growth Revolution* (2020) uses 11 scenarios to unpack fundamental transitions required in agriculture, education, demographics, manufacturing and governance to ignite a growth revolution in Africa. In addition, the African Development Bank Group publishes useful analyses that review the recent economic and political situations and predict the short- and long-term economic, political and social evolution of most African countries.

The choice of these particular megatrends is based on the assumption that they are deemed the most relevant for the formation of the big picture of the developments on the continent. The main question that arises when contemplating Africa's future is how these megatrends might affect the overall picture of what the continent will look like in a few decades. Will Africa be a growth success story or will positive developments be tempered by various internal and external challenges?

RAPID POPULATION GROWTH

Forty-three million Africans are born every year, a number that will increase to 53 million annually by 2040. More than half of the global population growth between now and 2050 is expected to occur in Africa.

Fertility rates across Africa vary significantly, ranging from 7 in Niger to 1.4 in Mauritius. According to the United Nations Population Division, there is a large unmet demand for modern contraceptives whereby nearly a third of the population in sub-Saharan Africa is unserved. There is a strong correlation between high child mortality and high fertility. As children's health improves, mortality declines and the demand for larger families decreases. Fertility rates are also closely associated with income levels, education as well as urbanization. Many African urban women have fewer children than their rural counterparts. For instance, in Ghana's capital, Accra, fertility rates are close to replacement levels, whereas those in rural parts of the country are closer to six children per woman.

There is also wide variation in terms of median age and life expectancy across the continent. The lowest is in Niger with the median age being 16 years and life expectancy 62 years, with the corresponding figures in Egypt standing at 25 and 72. The median age of the continent is 20 years. Africa has the largest youth bulge as a proportion of the total adult population in the world. A large youth bulge is associated with increased conflict risk and criminality. This phenomenon is linked to the correlation between lack of education opportunities and gainful employment and a youthful population with few future prospects.

Africa's very large number of children currently poses a drag on development. At the moment, there are 1.3 persons of working age for every one dependant in Africa. When the continent reaches a ratio of 1.7 persons of working age to each dependant, it will enter a window of rapid economic growth from the contribution of labour. This figure is considered to be the ideal ratio for economic growth by demographers. According to current projections, this is likely to happen in Africa in 2054, which means that it will take quite a few decades for Africa to reach a stage where economic growth will start to kick in and pay dividends in terms of sustainable development.

DYSFUNCTIONAL URBANIZATION

Africa's urban population is the fastest growing globally. By 2050, over 1.3 billion Africans will live in urban environments. As with population growth, there is diversity across the continent in terms of urbanization. North Africa and West Africa are the most urbanizing regions, whereas East Africa, particularly the Horn of Africa, is the most rural. Climate change and protracted conflict will accelerate urbanization.

It is worth noting that in the case of Asia, urbanization has largely been driven by people seeking employment and job opportunities in the productive sectors in industrial zones and cities. To this end, urbanization has been the essential motor of economic development. In Africa, this is not necessarily the case, at least not to the same extent. Rather, the main thrust of people moving to urban areas has been escaping rural areas because of destitution and poverty. They move from subsistence farming to the informal economy within the cities. This means that poverty is urbanizing. In addition, power, water, transport and communications are much more expensive compared to the corresponding prices in Asia, compounding the challenges that migrants to African cities face.

Much of the urbanization in Africa is unplanned and unregulated. This has negative effects on urban land tenure, land use and property rights. Over two-thirds of the African urban population live in informal settlements. Some are sheer mega-slums, as is the case with Nairobi's Kibera with over 700,000 people, or Cape Town's Khayelitsha with over 447,000. Urbanization rates in Africa are projected to rocket in the coming decades. Consequently, urban infrastructure and services are unable to cope with the demands of the growing populations. Water and sanitation

infrastructure break down, power grids are overburdened, the urban environment becomes dilapidated, epidemics and diseases spread, and street violence takes its toll, turning many parts of the crowded urban spaces into what can only be described as 'feral cities'. These feral cities exist side-by-side with wealthy neighbourhoods, where the more affluent citizens live behind barbed wire fences patrolled by security guards. With increased socio-economic inequality, overburdened urban spaces become susceptible to instability and insecurity. Without massive investment in urban environments, African urban infrastructures are likely to get progressively worse as pressure from population growth and migration builds.

CLIMATE CHANGE

Much has been written about climate change and its impact on Africa. It suffices here to briefly summarize the main effects of change that will unfold in the unlikely scenario that carbon emissions will and can be dramatically curbed in the next few decades.

Africa's contribution to global climate change in terms of carbon emissions is small, but the continent is disproportionately affected by the impacts of climate change. Agriculture and rural livelihoods in North and West Africa, in particular, are under increased threat as higher temperatures and shifting rainfall take their toll. These regions are already water-stressed. Extreme weather patterns, such as flooding and drought, make vulnerable populations even more susceptible to hunger, disease, and displacement. Climate change is also a long-term accelerator of violent resource competition.

As ecosystems are in peril and the impacts of climate change unfold across the continent, African cities must prepare for internal migration.[2] Communities that have contributed the least to climate change face the harshest consequences. At the end of 2019, two million people had been displaced across sub-Saharan Africa as a result of climate-linked disasters. This figure will rise steadily in the coming years and decades.

RESILIENCE OF NEO-PATRIMONIAL POLITICS AND SLOW DEMOCRATIZATION

At present, approximately 45 per cent of some 1.3 billion Africans live in 22 authoritarian states. Only 10 per

2   Mbiyozo, A-N. (2020). *Migration: a critical climate change resilience strategy*, Policy Brief. Pretoria: Institute for Security Studies.

Africa's population density
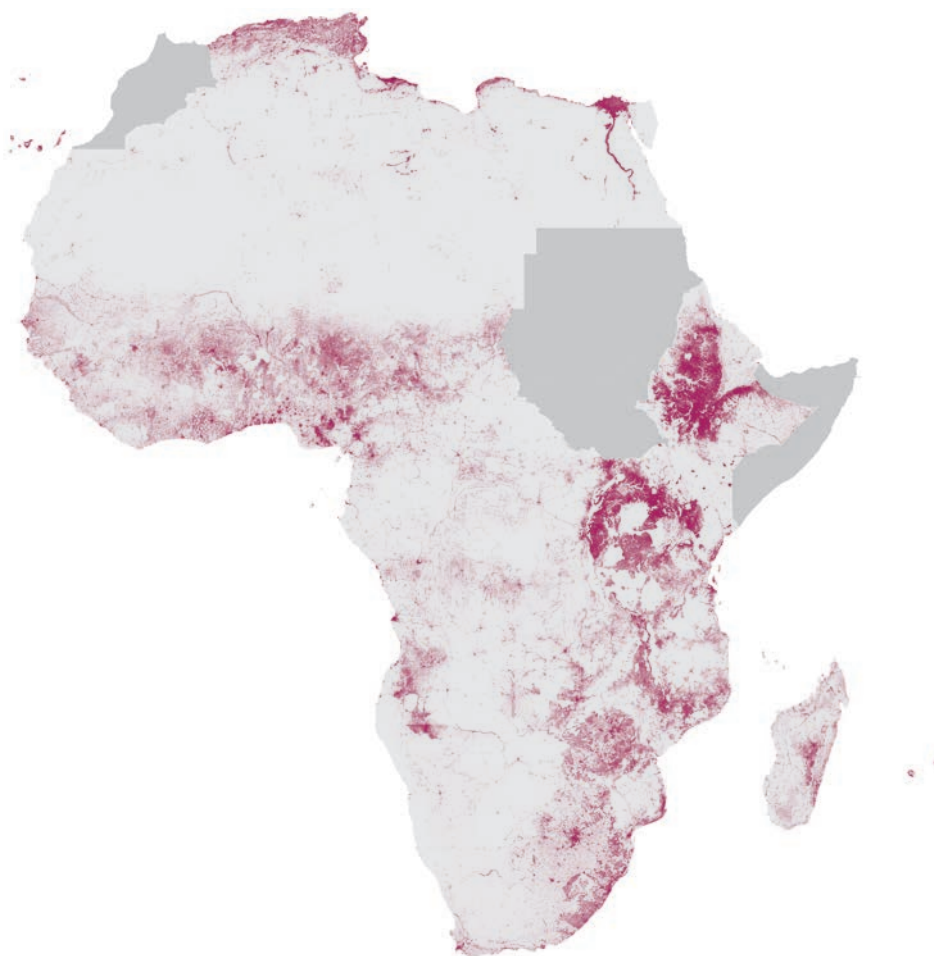
Map illustrating the population density of Africa. Information missing from Sudan, South-Sudan, Somalia and Morocco.
Source: Facebook Connectivity Lab and Center for International Earth Science Information Network – CIESIN – Columbia University. 2016. High Resolution Settlement Layer (HRSL). Source imagery for HRSL © 2016 DigitalGlobe. Accessed 5 March 2021.

cent live in democracies. There are 15 hybrid democracies that have a multiparty system and that go through the motions of elections, but where open debate and media freedoms are often curbed. The remaining six states, such as Equatorial Guinea and Eritrea, are outright dictatorships, while Libya is a failed state with little prospect of recovery.[3]

There is, of course, movement from hybrid democracies to fully-fledged democracies such as Botswana and Tunisia and vice versa, as is the case with Benin. Furthermore, the line between authoritarian and hybrid democracies is often thin, and there is back and forth movement within these two categories. The main point here is that there has been a slow movement towards democracy across the continent. The problem, however, concerns the quality of democracy. The incumbents flout electoral procedures and cook the books to stay in power. Opposition groups face

suppression regularly, while the space for and freedom of action for civil society is constantly under pressure.

The Ibrahim Index of African Governance (IIAG) is a tool that measures and monitors governance performance in African countries.[4] According to the IIAG, overall governance in Africa has progressed slowly in the past decade, but as of 2019 the continent registered a decline and progress appears to be coming to a standstill. The challenge remains that electoral democracy has not delivered better governance as expected. Some observers are of the opinion that apart from a few exceptions, Africa lacks many of the conditions for the consolidation of democratic governance.[5] These include a coherent national identity, rule of law, strong checks and balances, independent governance institutions and a strong civil society. In other words, the making of a Weberian state where institutions matter, and personalized politics does not, is still a work in progress.

3   Ruohomäki, O. (2019). Länsi-Afrikka erottuu edukseen. *Ulkopolitiikka*, (1), 66–69.

4   See https://mo.ibrahim.foundation/iiag.

5   Cheeseman, N. (2015). *Democracy in Africa: Successes, Failures and the Struggle for Political Reform*. Cambridge: Cambridge University Press.

Jakkie Cilliers takes the view that the resilience of neo-patrimonialism is the main obstacle to Africa's democratization process.[6] The term describes a system of politically corrupt patron-client relations that dominates African politics, and that exists at the highest national level down to the community level in small villages. Competition is about personal and family benefit and politics is about who governs, not about national policy, economic growth and the betterment of the nation at large. This form of politics is sometimes referred to as 'big men' politics. 'Big men' politics is damaging when the electoral competition is of the winner-takes-all type and there are weak institutions in place that are not able to act as checks and balances against the abuse of power. Some analysts take the argument further by arguing that in many African countries state actors function as organized criminal entrepreneurs through corruption and rent-seeking activities in an entirely legal marketplace, duly compromising the nature of the African state in the process.[7]

Despite the somewhat gloomy picture of the current state of affairs of African governance and politics, Africans are tired of autocrats and 'big men'. The Afrobarometer findings of recent years show that demand and support for democracy in Africa are growing.[8] For instance, a recent poll in Africa's most populous country, Nigeria, found that 74 per cent of the surveyed population preferred democracy over other forms of government. Another Afrobarometer poll of 11 African countries found that 79 per cent rejected strongman rule. People want to have a say in decisions that affect their lives, and are in need of accountable leaders and transparent institutions.

Globally speaking, the Fourth Wave of democracy is thought to have been set in motion after the Arab Spring. The global forecast is that in the long run democracy will slowly take hold and increase across the world, albeit with peaks and troughs. Furthermore, democratic backsliding is much more likely among low-income and lower-middle-income countries than in high-income countries, where robust checks and balances on power are in place.

Only progress towards substantive democracy and the development of strong independent institutions will undo the resilience of neo-patrimonial politics.

6   Cilliers, J. (2020). *Africa First! Igniting a Growth Revolution*. Cape Town: Jonathan Ball Publishers.

7   Scheye, E. and Pelser, E. (2020). *Why Africa's Development Models Must Change: Understanding Five Dynamic Trends*, Policy Brief. Pretoria: Institute for Security Studies.

8   See https://afrobarometer.org/online-data-analysis.

Holding regular free and fair elections, electoral reform, robust independent electoral monitoring and strict adherence to term limits are steps in the right direction. While authoritarian tendencies will continue to linger, the growing demands for change by civil society and the younger generations, many of whom are technologically savvy, will inevitably lead to more substantive democracy in the long term. The road is fraught with challenges and hurdles, however.

PROTRACTED CONFLICT

There is no development without peace and stability. This maxim is highly relevant in many parts of Africa, particularly in the Sahel and Horn of Africa, where violent conflict has become entrenched, and has caused immense misery and suffering. The prospects for breaking the vicious circle are bleak. Furthermore, violent conflict not only creates more vulnerabilities in already stressed-out situations, it also causes internal displacement, forcing people to flee to the cities and urban areas from the more remote hinterlands and borderlands, where different armed groups hold sway. A case in point is the situation in Cabo Delgado in northern Mozambique, where a radical Islamist group has terrorized the local population since 2017.

Low levels of education, the spread of small arms, unemployment, radical ideologies and geopolitical competition have been some of the structural factors that have contributed to the prevalence of violent conflict. Poor governance and lack of development have not helped the situation. Many of the current conflict hotspots will remain highly problematic sources of instability for years and decades to come as the structural factors underlying conflict remain poorly addressed.

With rapid urbanization and population growth in the cities, the nature of violence and conflict will gradually change. Increased connectivity and travel will, for instance, shrink the ungoverned spaces that are associated with modern-day African insurgencies. Concomitantly, large areas in the hinterlands and borderlands will become permanently beyond the reach and writ of central governments.

The mobile phone revolution and increase in the use of various social media platforms, together with rising levels of literacy and education, boost the ability of opposition and protest movements to mobilize followers to demand change. In all likelihood, social protest, demonstrations, riots and urban discord will become more prevalent in the coming decades. Conflicts over

urban tenure, land and property rights will increase. With large unemployed and youthful populations, the dysfunctional megacities of Africa will become hotbeds of violence. Ungoverned and unserviced urban dystopias will join ungoverned hinterlands. People migrating to cities as 'climate refugees' will compound already difficult situations. State fragility will remain a major hurdle for the sustainability of any positive developments that might otherwise take root.

ATTEMPTS AT CONNECTIVITY AND UNLOCKING TRADE POTENTIAL

The levels of connectivity in Africa vary immensely. Megacities such as Lagos, Nairobi and Johannesburg are well connected to regional and global flows and networks of goods, people, services, capital and information, whereas connectivity in much of sub-Saharan Africa is low. Greater connectivity is a basic prerequisite for the continent to meet the rapidly rising needs of the growing population.

A reliable energy supply is perhaps one of the most critical needs. According to the United Nations Environment Programme, it will take sub-Saharan Africa until 2080 for its entire population to have universal access to energy. This means major investments in energy infrastructure. Nevertheless, the continent has great potential for harnessing hydroelectric, geothermal, solar and wind as sources of renewable energy.

There are examples of rapidly developing connectivity in Africa. For instance, mobile coverage in sub-Saharan Africa is increasing, with 70 per cent of the population currently having access, while the figure for mobile internet penetration is 24 per cent. There are at present some 272 million mobile internet users in sub-Saharan Africa. This figure is expected to rise to 475 million by 2025. However, low literacy and digital skills coupled with affordability still pose barriers to digital connectivity, particularly in rural areas.

As the example of expanding mobile coverage shows, leapfrogging in some fields and sectors is possible. Decentralized mini- and off-grid energy solutions, ICT and digitization are other examples where the continent can potentially leapfrog in terms of development and growth. Services such as mobile banking are rapidly expanding across Africa.

In 2018, the African Union embarked on an ambitious plan to enhance and foster intra-African trade. The AfCFTA (African Continental Free Trade Area) is estimated to be as large as the current population of 1.3 billion people across Africa, with a combined gross domestic product of USD 3.4 trillion.[9] It is expected to boost trade between and among the African countries, promote industrialization, create jobs and improve the competitiveness of local industries on the global stage. Nevertheless, transport infrastructure – including roads, railways, sea transport and aviation – needs huge investments and maintenance in order for real regional integration and economic growth to be realized.

It will take decades before the AfCFTA will be anywhere near as efficient as other regional arrangements in the developing world, such as that of ASEAN (Association of South-east Asian Nations) for instance.[10] Real integration needs legal and regulatory frameworks in place combined with robust and independent institutions that deliver. Given the current state of affairs vis-à-vis governance in Africa, this will take a very long time to come to fruition. If successful, the AfCFTA will be a key factor in Africa's gradual economic self-reliance. In one sense, the AfCFTA is very much about the continent's second phase of independence following political independence in the 1950s and 1960s.

Peace and stability are basic prerequisites for any concrete infrastructure projects to proceed, and for countries and regions to connect. Nevertheless, the trajectory of regional integration within the African continent is the right one and has the potential to lift tens of millions of people out of poverty.

A NEW SCRAMBLE FOR AFRICA

There is a new scramble for Africa. The reasons behind this are increasing demands for the vast natural resources of the continent, the growing African consumer market, and geopolitical competition. Some players such as Saudi Arabia and China are leasing land on the continent to ensure their food supplies. External powers vie for the votes of African states in global governance structures. Others seek local alliances to hedge against their competitors.

The ties that bind Africa and the European Union are broad and deep as a result of history, proximity and shared interests. Cooperation ranges from security, migration and mobility to aid, trade and cultural affairs. The EU has been and remains, for the time being, the most important partner for most African countries.

9   See https://au.int/en/cfta.

10 Gaens, B. and Ruohomäki, O. (2018). *Regionalism à la ASEAN: Past achievements and current challenges*. FIIA Briefing Paper 237.

There is growing interest in Africa within the EU. This is exemplified by the EU's strategy with Africa that was unveiled on 9 March 2020, and the subsequent Council conclusions on Africa.[11] In a similar vein, Finland has completed a strategy for Africa. The US also continues to be a major actor, particularly in the security field, with multiple military bases across the continent. However, new players have taken to the stage and are changing the ways in which Africa interacts with the outside world. They bring with them development and growth models that serve as an alternative to the European and American models, which espouse democratic governance and market liberalism.

China's footprint has expanded enormously in recent years. Although the main focus of China's Belt and Road Initiative is on connecting China to its immediate neighbourhood in Asia, Africa is benefiting particularly from major infrastructure projects, such as seaports, roads and railways. China's authoritarian governance model coupled with state capitalism attracts some African leaders. Turkey and Persian Gulf monarchies are extending their influence and strategic footprint, particularly in the Red Sea region and the Horn of Africa. For instance, the United Arab Emirates, Qatar, Saudi Arabia and Turkey have established numerous seaports, logistics hubs and military bases along the shores of the Red Sea and the Horn of Africa.

India's ties with African states have increased steadily in the economic, politico-strategic, educational and cultural spheres. India is projected to become a dominant player, particularly in eastern and southern Africa and not least because some three million people of Indian origin live on the continent. Russia is an important defence partner for Africa and the major supplier of arms to the region. It also has economic motives for involvement in the continent, as it has a shortage of certain minerals such as manganese, bauxite, and chromium, all of which are important for industry. Cooperation in the field of nuclear energy is another facet of Russia's involvement. Nonetheless, Russia's clout in Africa is and will remain tied to a handful of client states with limited strategic significance.

In all likelihood, the scramble for Africa will intensify in the coming decades. Africans will become more cognizant of the fact that they have alternative partners and models for development that they can turn to. African leaders and governments can attract investments in a competitive environment and diversify their partners to reduce economic and political dependency.[12] If they play their cards wisely, African leaders and governments can claim back the agency that was stripped from them in the colonization process, and in recent decades where the global North has dictated the terms of engagement with Africa. For the EU, this means that it will become just another player among the plethora of actors vying for Africa's attention and resources.

UNEVEN DEVELOPMENTS, GLIMMERS OF HOPE, WISE CHOICES NEEDED

The main argument of this Briefing Paper has been that the sustainability of positive developments in Africa is somewhat tenuous and uneven. There are both prospects for peace and prosperity as well as instability and insecurity across the vast and diverse continent. Some parts of the continent will gradually develop and catch up with competitors in the rest of the developing world, while other parts will be caught up in a vicious circle of violence and underdevelopment. Structural factors that hinder development need to be tackled head-on. Nevertheless, the young population wants to have a say in the direction that the future takes, and this may affect the course of the continent's developments. There are possibilities for leapfrogging in some fields, as exemplified by digital connectivity.

Above all, Africa needs to harness the vast natural resources and its growing urbanizing population in order for the continent to develop. At the same time, it needs to regain and exert a strong sense of agency, choose its partners wisely and strategically, and avoid becoming a playing field for geopolitical rivalries. On both domestic and foreign policy fronts, much depends on the quality and leadership of African leaders. Visionary, Nelson Mandela-like African leaders would be sorely needed on this perilous journey towards the future. While climate change and its effects on Africa is a mega-level trend that is to a large extent beyond the control of the African continent, all of the other megatrends and their direction are very much affected by political choices. /

11   European Commission (2020). *Joint Communication to the European Parliament and the Council: Towards a Comprehensive Strategy with Africa*, 9 March; Council of the European Union (2020). Council conclusions on Africa, 30 June.

12   Soule, F. (2020). 'Africa+1' summit diplomacy and the 'new scramble' narrative: Recentering African agency. *African affairs*, 119/77, 633–646.