



POLICY BRIEF

African futures Key trends to 2035

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and Alex Porter

Africa is undergoing several major transitions, including demographic, economic, technological, urban and socio-political. These transitions are all connected, and together they will shape the future of the continent. Looking to the future, Africa's overall story reveals a positive trend. Yet this trend is neither stable nor even. Things are getting better in some places, but not everywhere, not for everybody.

Key points

- ▶ On the current trajectory, extremely rapid population growth is set to compound poverty and lack of economic opportunities in sub-Saharan Africa.
- ▶ To improve resilience against external shocks, African countries need to diversify their economies, increase productivity, create jobs, invest in critical infrastructure and the development of human capital.
- ▶ Improving connectivity infrastructure should not come at the cost of improving basic infrastructure.
- ▶ Urban governance needs to improve to manage rapid urbanisation and capitalise on it for economic development.
- ▶ Africa is likely to retain a high conflict burden. This requires continued investment in conflict prevention, control of arms, security-sector reform, the rule of law and regional forces.
- ▶ Democracy is likely to consolidate, and popular support will remain strong. Yet, democracy rests on fragile foundations, and continued support will be important.

Several major transitions are shaping Africa's future. Demographic change will be accompanied by economic, technological, urban and socio-political transformation with far-reaching implications for growth, human development and stability on the continent. This policy brief summarises the findings from a more comprehensive report exploring how development trends are likely to unfold in Africa until 2035.¹

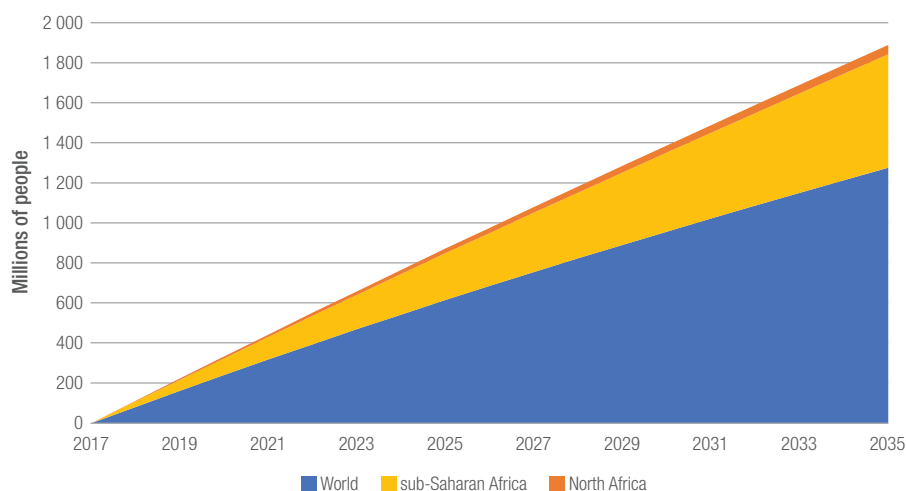
All forecasts use the International Futures forecasting system (IFs), developed and hosted by the Frederick S. Pardee Center for International Futures at the Josef Korbel School of International Studies at the University of Denver.²

Africa's population: growing rapidly and chronically young

From a global perspective, Africa's demographic potential is unparalleled. Yet on the current development trajectory, extremely rapid population growth is likely to compound poverty and lack of economic opportunities.

Africa's population is the fastest growing in the world and will account for nearly half of global population growth over the next two decades (see *Figure 1*). It is expected to increase from about 1.2 billion people today to over 1.8 billion in 2035, a roughly 50% increase over the next 18 years. By 2035, Africa's population will be considerably larger than that of India (1.6 billion) or China (1.4 billion). The demand for services such as healthcare, education, housing and infrastructure will increase dramatically and put African governments under great stress.

Figure 1: Population increase forecast in millions, 2017–2035: World, Sub-Saharan Africa, North Africa



Source: IFs v 7.26, historical data from US Census Bureau via CIA and United Nations Population Division (UNPD) 2015

Moreover, sub-Saharan Africa's population will remain very young. By 2035, half of its citizens will still be under 21 years old.³ Hence governments need to spend heavily on education, healthcare and extending basic services. In addition, they need to invest in skills development and create job opportunities for the workforce of the future. Failing the latter, youthful populations portend an increased risk of social instability.⁴ A large youth

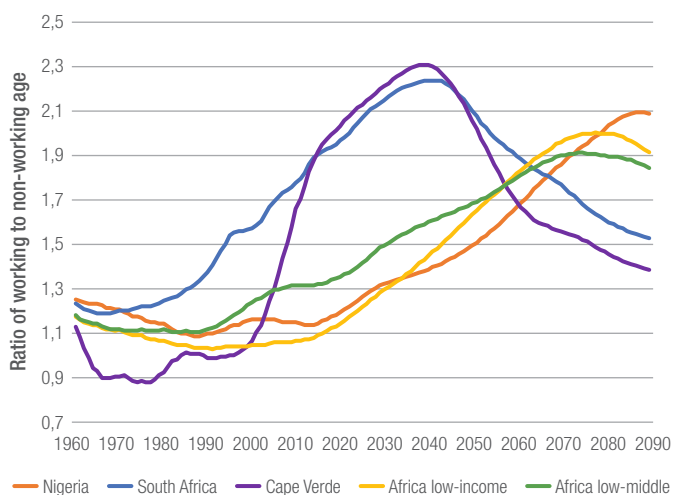
bulge, defined as the share of adults between 15 and 29 years old relative to the rest of the population, is set to remain a key feature of most countries in sub-Saharan Africa.

The economic performance of Africa's regions and countries will vary greatly

As Africa's population ages, the ratio between working-age individuals and the economically dependent population will improve. A relatively larger labour force can translate into a demographic dividend, boosting productivity and economic growth.

However, mostly due to high fertility rates, Africa's low-income and lower-middle-income countries are unlikely to enter this phase until well into the second half of this century (see Figure 2). More importantly, the demographic dividend is not a given. Failing aggressive investment in human capital and job creation, African economies are unlikely to capitalise on it.

Figure 2: Demographic dividend: ratio of working to non-working age 1960–2090



Source: IFs v 7.26, historical data from UNPD

Reducing fertility rates via improved secondary education for girls, targeted family planning and better access to contraceptives would lead to an earlier onset of, as well as a larger, demographic dividend.

The demographic transition is connected to migration trends. Typically, younger, lower-income and/or conflict-ridden countries experience net-outward migration.

Levels of extra-continental migration from Africa are low by international standards, albeit on the increase. The vast majority of migration, including forced displacements, happens within the continent. By mid-2016 sub-Saharan Africa hosted more than 27% of the global refugee population.⁵

In the future, Africa is likely to retain a high conflict burden, and climate changed-induced stress will force more people to move. Most of these people will stay on the continent, simply because they cannot afford to move further. Yet, an increase in extra-continental migration is possible as rising incomes in some countries will allow people to make more deliberate choices of where to go.

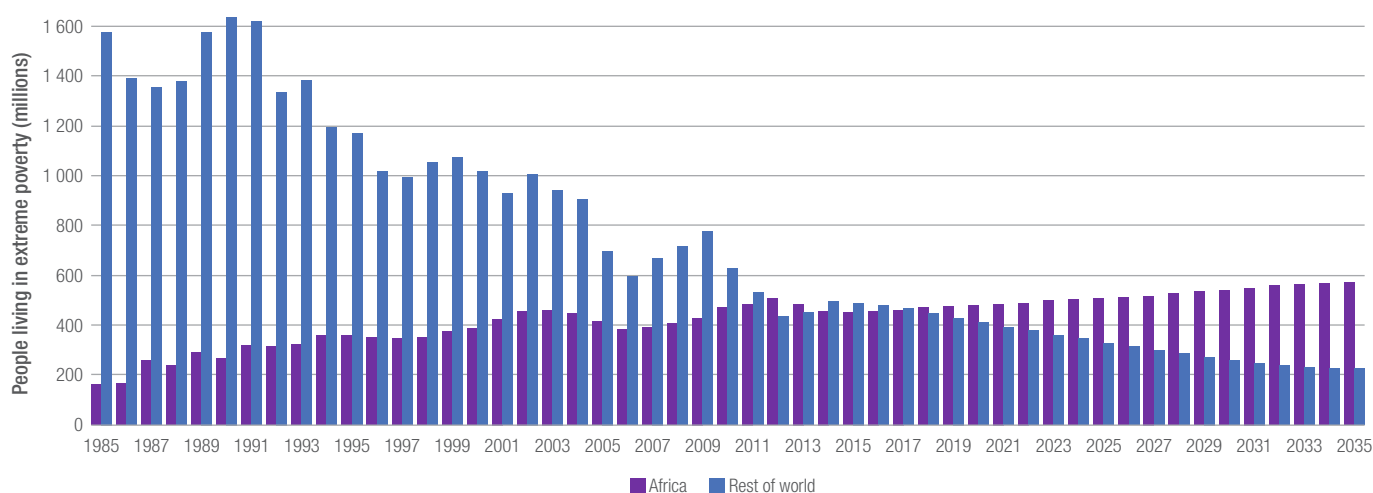
Economic growth paths will be increasingly heterogeneous

Africa will continue to experience economic growth although it is expected to lag behind South Asia as the fastest-growing region in the world. In the longer term, sub-Saharan Africa is likely to settle at an average annual growth of approximately 4 to 4.5%. However, the performance of different regions and countries will vary significantly. East and West Africa are expected to grow most rapidly and North Africa the slowest. This is at least partly a function of these regions' different base lines and dissimilar rates of labour expansion. A growing workforce and an increasing share of working-age individuals will contribute to growth even if productivity remains low and if – in the worst case – African governments do little to stimulate the economy.

Yet much of Africa will remain vulnerable to global developments. Africa's oil and metal exporters will continue to be the most exposed to global price shocks. The oil-dependent economies are especially vulnerable, notably Nigeria but also Angola, Chad and Equatorial Guinea. Growth in non-hydrocarbon-dependent economies – energy importers and agricultural exporters – has weathered global storms and is likely to remain stable. Current and expected growth rates for some of Africa's agricultural exporters, such as Côte d'Ivoire, Ethiopia, Rwanda and Senegal, are in line with Asia's fastest-growing economies.

Most of sub-Saharan Africa's economies are unlikely to grow fast enough to keep pace with the continent's extremely rapid population growth and the associated pressure on education, healthcare and other basic services.

Figure 3: People living in extreme poverty (millions), Africa and the rest of the world, 1985–2035 (using a five-year moving average)



Source: IFs v 7.27

Unlike the global trend, the number of Africans living in extreme poverty (less than \$1.90 per day) will continue to rise, despite the fact that the percentage of the population living in poverty is set to decrease (see Figure 3). In 2035 there could be as many as 170 million more extremely poor Africans than in 2016.

Sub-Saharan Africa’s future economic prospects depend on the ability of African governments to create new sources of sustainable growth. This will depend on the quality of economic policies, but also on long-term integrated planning and improvements in regulatory frameworks.

Inevitably, different countries will choose different paths based on their particular economic profiles and comparative advantages. For Africa’s oil exporters in particular, diversifying the revenue base is necessary to enable sustainable growth over the long term.

African governments generally need to raise domestic revenue much more effectively, including via efforts to gradually incentivise formalisation of Africa’s informal sector, the largest of the world’s developing regions. All countries need to simultaneously invest in trade infrastructure and agreements to foster intra-regional trade and create economies of scale.

If Africa is able to successfully leverage growth opportunities across different economic sectors – and pair that with increases in productivity, investments in critical infrastructure, human capital and human

development – the continent will be less vulnerable to external shocks and increasingly able to determine its own economic future.

More connected but likely to remain relatively isolated

Africa remains relatively isolated – both from the global economy and across its regions. As a continent, Africa represented about 3% of the global economy in 2016, and that figure is only expected to change by roughly a percentage point by 2035. With such a small share of global economic output, increasing trade between African countries and regions may be the most promising avenue to promote economic growth and human development on the continent.

Efforts to improve connectivity infrastructure should not come at the cost of the provision of basic human infrastructure

In 2017, Africa remains significantly less integrated than other world regions. Currently, only about 16% of Africa’s exports are traded between African economies. In contrast, in Europe and East Asia intra-regional trade accounts for roughly 60% and 35% of total trade volume respectively.⁶

Deeper regional integration can help African countries prioritise investment in sectors where they have a

comparative advantage regarding their peers. Moreover, it can foster the establishment or promotion of industries in which African businesses have the potential to participate and compete in global markets.

Africa's ability to participate more in global trade depends on whether its economies are able to go up the value chain and whether some can reduce their heavy reliance upon commodity exports. It also depends on progress in infrastructure development on the continent and on curbing a host of other non-tariff barriers, such as onerous regulatory procedures.

Despite some recent improvements, Africa's lack of core infrastructure increases transport costs and creates delays. It reduces the competitiveness of business and undermines much-needed investment flows.

That said, improving transportation and trade infrastructure and streamlining regulations only addresses part of the infrastructure problem in sub-Saharan Africa.

Cheaper goods can help low-income individuals increase consumption, but the ability to produce, start businesses and grow is largely driven by human capabilities. Thus a strategy to connect Africa must include investment in basic infrastructure, such as access to clean water and improved sanitation (WASH – Water, Sanitation and Hygiene), to ensure healthy human capital development.

In 2016, sub-Saharan Africa endured the lowest levels of access to basic infrastructure anywhere in the world (see Figure 4). And while access to water and sanitation, electricity and the share of paved roads is expected to improve considerably by 2035, the region will still lag far behind other developing regions.

This lag is most severe for electricity access and WASH. Lack of access to these basic services hinders human development, both physically and cognitively.

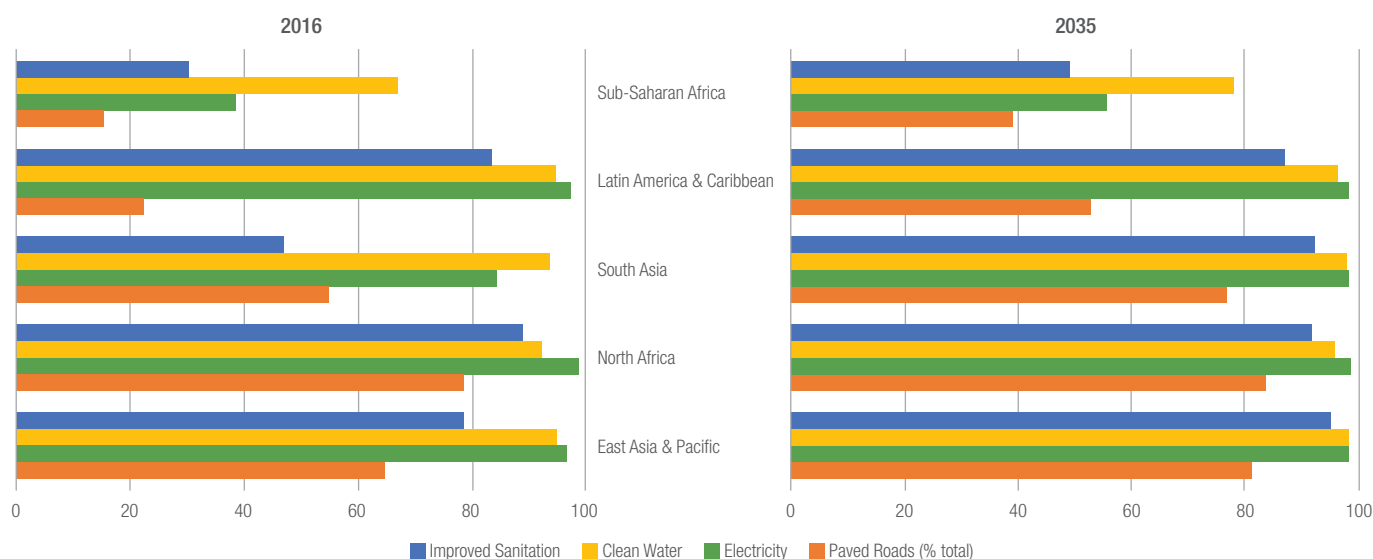
Lastly, in sub-Saharan Africa, efforts to improve connectivity infrastructure should not come at the cost of the provision of basic human infrastructure. In this sense, improving connectivity infrastructure should be part of a broad-based infrastructure investment strategy.

Modern technology may offer a way to replace costlier forms of more basic infrastructure. However the belief that technology will solve Africa's most tenacious problems paints an overly simplistic picture of the challenges faced by the continent.

For example, it may be possible to use drones to transport blood to rural hospitals – bypassing poor, often unpaved, roads in the process. However doctors, nurses and patients must still use whatever roads and bridges exist to get to those same hospitals.

Combining the provision of basic infrastructure with a coherent regulatory framework and policies that

Figure 4: Levels of access to basic infrastructure (percent of population) in developing regions in 2016 and 2035



Source: IFs v 7.27 initialised from UNICEF/WHO joint monitoring programme (water and sanitation), International Road Federation (roads) and World Bank (electricity) data

incentivise, rather than prohibit, cross-border trade and the free movement of people could have a profound impact on the well-being of millions.

Urbanisation comes with both opportunities and risks

Africa's future is urban. Quality of life for Africa's city dwellers will, however, directly depend on the quality of urban governance. Rapid and sustained urban population growth is bound to further constrain governments already struggling to provide land and basic services.

Africa's urban population is the fastest growing globally. In fewer than 20 years every second person in Africa is likely to live in a town or a city, and by 2030 Africa will host six of the world's 41 megacities. Cairo, Lagos, Kinshasa, Johannesburg, Luanda and Dar es Salaam will have more than 10 million inhabitants each.

Africa is witnessing an increase in the number of violent incidents largely driven by riots and protests

The urban transition has the potential to accelerate economic and social development, but under current conditions it is more likely to compound Africa's structural challenges. Slow economic structural transformation, poverty, inequality and violence are all major stumbling blocks.

In most countries, urban population growth has been outpacing economic development, partly because of the lack of employment creation in higher productivity segments of the economy. Sharp income inequalities in many African cities also mean that the contribution of economic growth to poverty reduction is limited.

Africa has more urban poor than any other region. Research from the World Bank indicates that poverty could be urbanising as the poor are moving to cities more rapidly than the population as a whole.⁷ And even though future improvements in urban poverty reduction are likely, the sheer number of poor people who lack access to services like improved water and sanitation is expected to increase dramatically. The African Economic Outlook 2016 predicts that Africa could see its slum population triple by 2050.⁸

Uncontrolled, rapid urbanisation in the context of pervasive poverty, inequality, large youthful populations and lack of economic opportunities does not bode well for future sustainability of Africa's towns and cities. In fact, unplanned, overcrowded urban settlements populated with marginalised youth can be hotbeds for violence, particularly in lower-income informal areas.

Urban areas are increasingly the locus for political violence in Africa. Over the past 20 years the number of politically violent events in Africa's urban areas has come to surpass those in rural settings, largely explained by the rise of riots and protests. On the other hand, terrorism in Africa to date is concentrated in rural rather than in urban areas.

Another form of urban violence is mostly economically motivated. This includes homicide, organised crime and gang violence.

Overall, conflict in Africa is causing fewer fatalities than during the 1990s

In Africa, levels of high-fatality violence⁹ are now generally comparable to those of half a century ago and are significantly lower than during the post-Cold War period (see Figure 5).¹⁰ However, the continent is witnessing an increase in the number of violent incidents largely driven by riots and protests (see Figure 6).¹¹

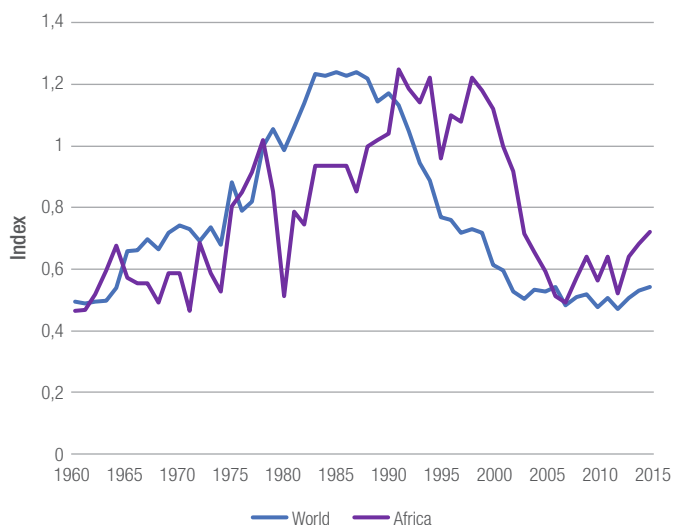
Most armed conflicts in recent years have been clustered in four regions: North Africa, the Sahel and West Africa, the Horn, and the Great Lakes region. These areas are likely to continue to experience conflict over the coming decades, partly because past conflict is one of the best predictors of future conflict.

In 2016, the most common event types were (in descending order) riots and protests, violence against civilians, battles, and remote violence (use of improvised explosive devices or IEDs). In the same year riots and protests accounted for almost 40% of total conflict events in Africa, up 10% from the previous year.

Despite the rise in social conflict, battles between armed groups and the use of remote violence are currently the most common conflict types. In fact, the rising use of remote violence is a trend across Africa (and the world). The use of IEDs in Africa nearly doubled from 2010 to 2011 and has been rising steadily ever since.

The actors and groups involved in conflicts are also changing. Rebel groups and state forces are historically

Figure 5: Conflict in the world and Africa, 1960–2015



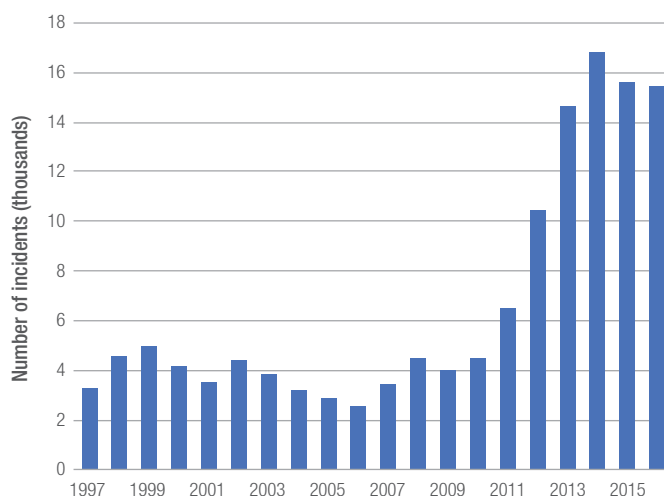
Source: Center for Systemic Peace, MEPV 2015

the most common actors, but increasingly, political and communal militias and unidentified armed groups dominate (see Figure 7).

Terrorist incidents are increasing globally – and Africa is no exception. Fatalities caused by terrorist attacks in sub-Saharan Africa increased from 3 842 in 2013 to 13 333 in 2014, although they dropped to 10 469 in 2015.¹²

Politically motivated violence, however, is only part of Africa’s future. Analysts argue that the increasing levels

Figure 6: Incidents of political violence in Africa, 1997–2016

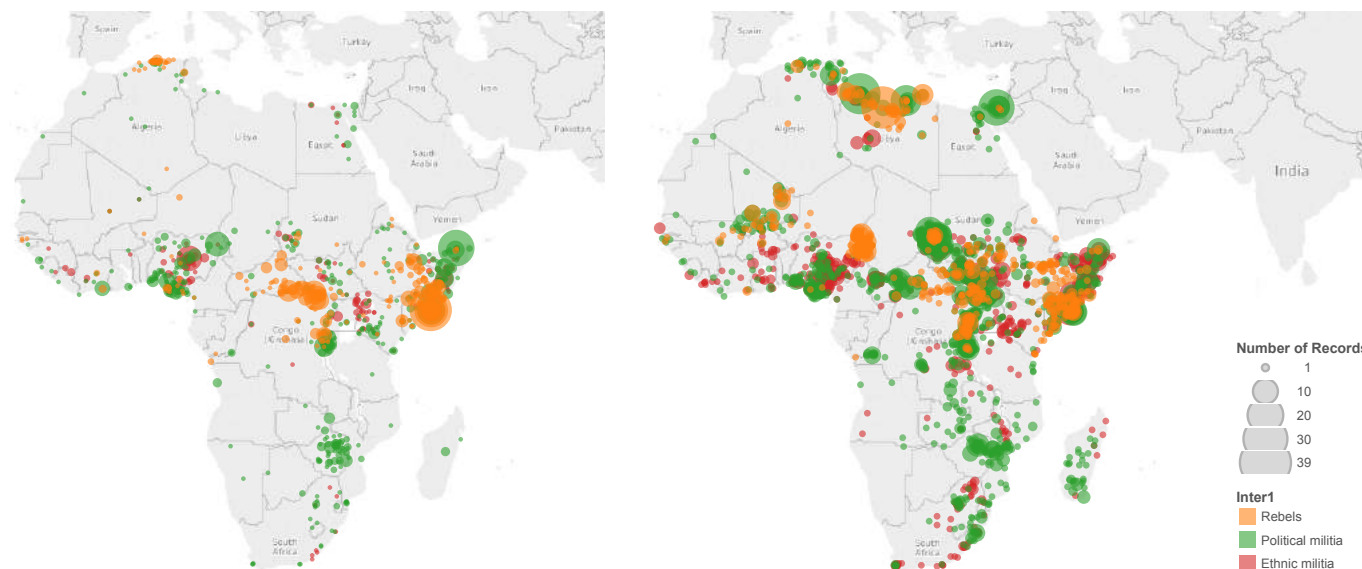


Source: ACLED, v 7

of criminal violence in Southern Africa, West Africa, North Africa and the Sahel are expected to cause more deaths than armed conflict in the next five to 15 years and beyond.¹³

Conflict and violence are mitigated and contained both by domestic and international factors. The majority of sub-Saharan African states have low levels of state capacity compared to other developing regions, a situation that is unlikely to change significantly in the future. Where states struggle to establish rule of law,

Figure 7: Conflict events by rebels and militias in Africa, 2010 (left) and 2016 (right)



Source: ACLED, v 7.0, January 2017

control borders, and provide basic services, conflicts will persist and have greater spillover effects. In addition, states are themselves often actors in conflicts, either directly through military offensives or through support to pro-government militias.

In the face of capacity constraints and ongoing transitions from autocracy to democracy, the international community will continue to be a key player in Africa's future security, particularly in the provision of peacekeepers.

That said, the nature of international engagement in Africa is changing. Increasingly, peace operations are deployed in situations where there is no peace to keep, where formal peace settlements between armed parties to the conflict have not been reached. In a number of countries – Sudan, Mali, the DRC – conflict persists despite long-standing operational engagement because of the shaky foundation upon which peace rests in these countries.

Despite Africa's expanding role in peace operations on the continent, operations will remain heavily dependent on the UN and various bilateral donors to fund peacekeeping and conflict-resolution activities.

Eventually only stable states with credible security agencies that control and police their borders provide a long-term solution to the current levels of instability. Therefore Africa needs to invest in the required security institutions and processes while expanding regional

cooperation and collaborative approaches to responding to insecurity.

Defying the global trend, popular support for democracy in Africa should hold

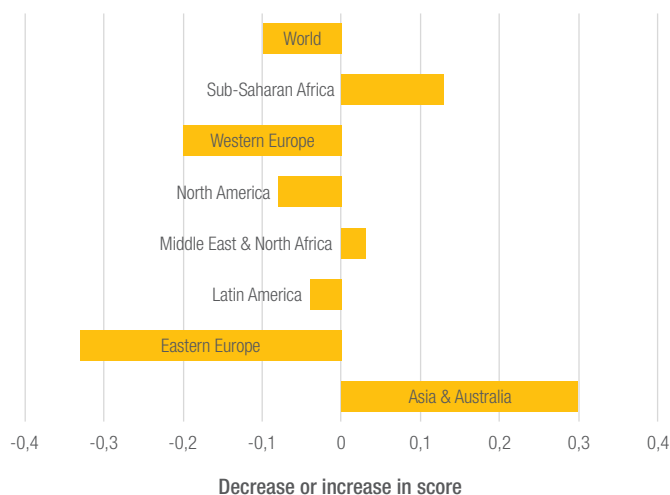
The number of democracies in Africa is likely to increase, and levels of democracy are expected to continue to improve, even if slowly and from a relatively low base. Public support for democracy in Africa is particularly strong. However, since African countries are democratising at ever lower levels of income and education, democracy on the continent rests on fragile foundations.

Key datasets indicate a recent moderate decline in the level of democracy globally¹⁴, but in Africa this trend is not evident.

Figure 8 summarises the difference in the Economist Intelligence Unit (EIU) average score for each global region between 2006 and 2016 with negative scores indicating a decline in levels of democracy over time and positive scores pointing to improvements. While the level of democracy in the world has declined, the levels of democracy in sub-Saharan Africa, Asia and Australia have improved.

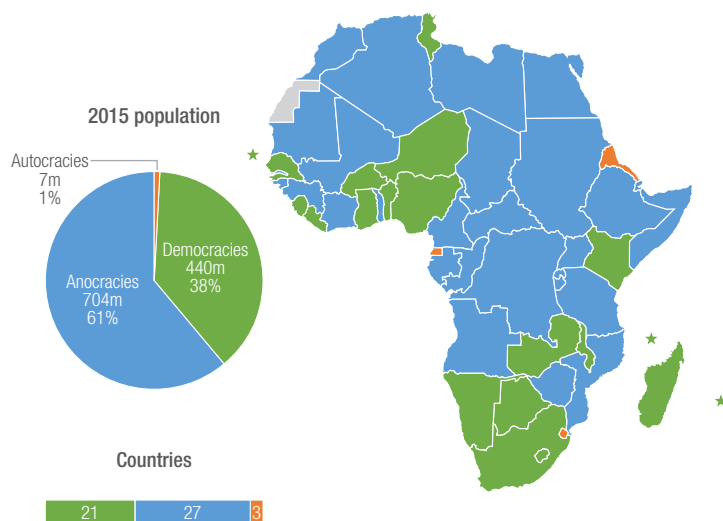
That said, democracy is still not the dominant form of government in Africa. Even the most optimistic index, Polity IV (see Figure 9), only classifies 21 out of the 53 African countries it assesses as democracies in 2015.¹⁵

Figure 8: Difference in democracy score by region, 2006 and 2016 compared, according to the Economist Intelligence Unit



Source: EIU

Figure 9: Democracy in Africa according to Polity IV (2015)



Source: Polity IV, 2015 data

According to the EIU, only 11% of Africans (or 128 million people) live in a full or flawed democracy, compared to 545 million who live in partly free countries and 540 million in countries deemed 'not free'.

In fact, essential elements that ensure democratic accountability are often absent on the continent.¹⁶ These include clean and competitive elections, chief executives who are directly selected through elections, extensive suffrage, political and civil society organisations able to operate freely, and lastly freedom of expression including access to alternative information.

The barriers to democracy are both deeply entrenched and widespread on the continent

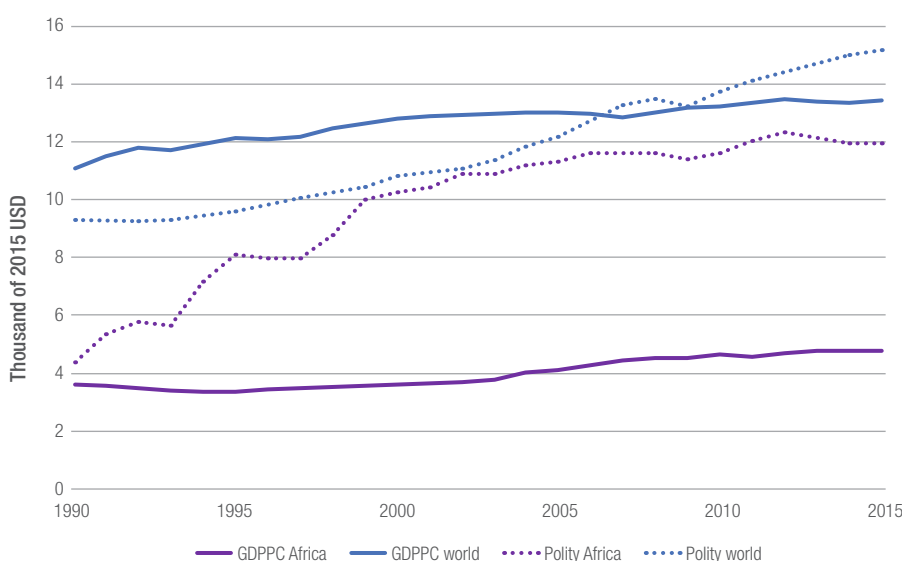
Yet Africa is relatively more democratic than could be expected given its generally low levels of GDP per capita (see Figure 10). This might in part be the result of conditional development assistance and/or the impact of the rapid spread of the internet and access to television and sources of alternative information.

Popular demand for democracy in Africa is robust and has been rising steadily over the past decade, according to Afrobarometer.¹⁷ More than two thirds of Africans surveyed support democracy as the preferred type of political regime and an even higher share rejects alternative authoritarian regimes.¹⁸

This makes sense in a context where citizens have been poorly served by decades of authoritarianism and where democracy is often a facade. Today most Africans want more democracy than they are actually getting.

More than four in 10 Africans complain that voters are at least 'sometimes' threatened with violence at the polls; that opposition candidates are at least 'sometimes' prevented from running; that the news media 'never' or only

Figure 10: Income and democracy



Source: Polity IV and IFs v 7.22

ACCORDING TO THE EIU, ONLY
11%
OF AFRICANS (OR 128 MILLION PEOPLE) LIVE IN A FULL OR FLAWED DEMOCRACY

'sometimes' provide fair coverage of all candidates; and that voters are 'often' or 'always' bribed. Half of Africans say that elections are currently an inefficient mechanism to ensure that people's views are represented and that voters are able to remove non-performing leaders from office.¹⁹

Governing elites in Africa go through the motions of elections with increased regularity, but their actions often ensure the re-election of the ruling party and its preferred candidate.

Moreover, there are several examples of African leaders amending their constitutions to remain in power (for example in Burundi, the Republic of the Congo and the Democratic Republic of the Congo) (see Figure 11).

The barriers to democracy are both deeply entrenched and widespread in Africa. Neopatrimonialism, which sees officials and elected leaders use state resources to secure loyalty, is common. This frustrates the extent to which electoral democracy translates into accountability and thus into improved outcomes on growth and human development.

Yet over time greater transparency, best practices and the use of modern technology during voter registration

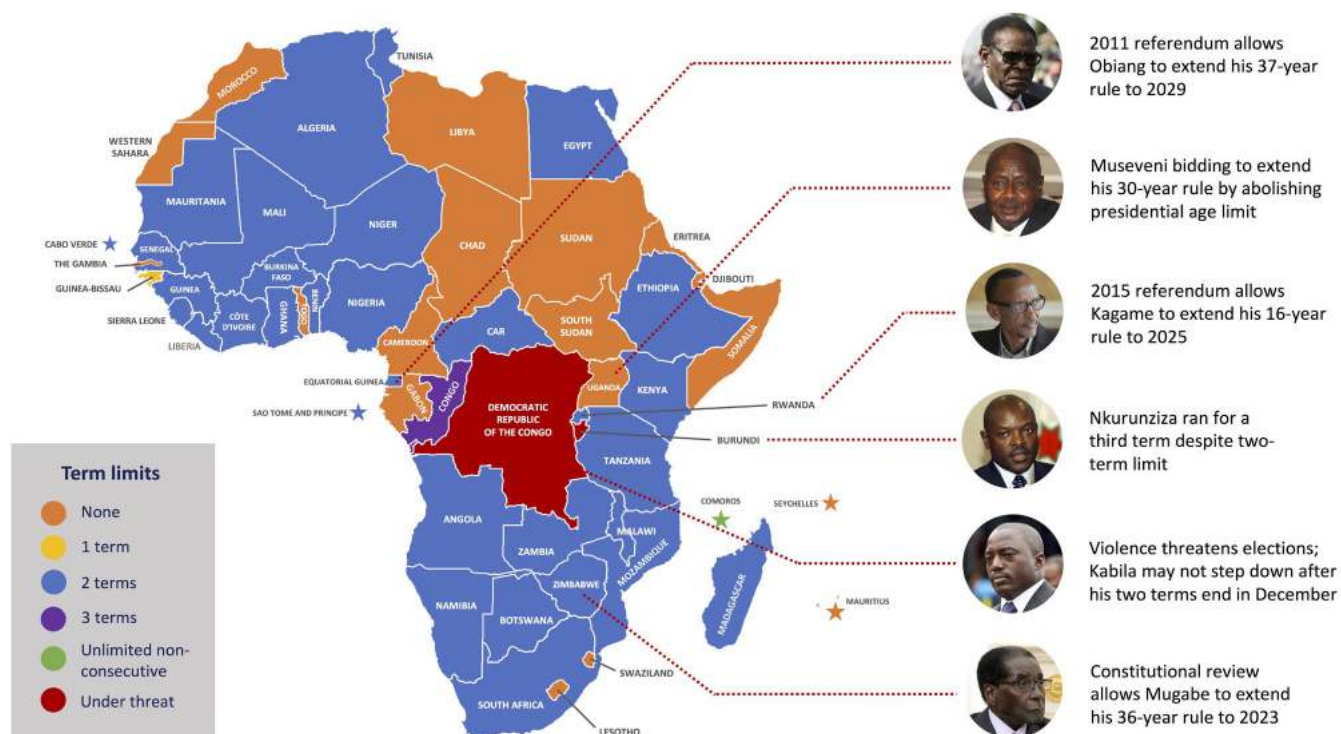
and during elections will undermine the opportunities for fraud and help improve electoral governance. Most important of all, African civil society is becoming more adept at guarding against manipulation, and regional organisations such as the African Union (AU) are slowly playing a more important role to verify and accompany electoral processes.

Eventually the question is if 'output legitimacy' will win over 'input legitimacy'

Eventually the question is if 'output legitimacy' (or whether a government delivers, aka the Chinese and/or Rwanda/Ethiopia model) will win over 'input legitimacy' (whether a government is sufficiently inclusive and hence legitimate).

The challenge faced by many African countries is that they are forced to increase inclusion when the foundations of sufficient security and state capacity upon which to build democracy are still weak. The issue is not a choice between democracy and development – it is how to steadily advance inclusion at a pace commensurate with social and economic development.

Figure 11: Presidential term-limit extensions



Source: ISS

Conclusion

Overall, Africa's story reveals a positive trend. Yet this trend is neither stable nor even. Living conditions are improving in many places, but not everywhere, not for everyone and – in the light of the continent's rapidly growing population – certainly not fast enough.

Progress in sub-Saharan Africa continues to lag behind other developing regions, and in most countries population growth is outpacing economic, social and institutional developments. Technology can help

promote human development, but its ability to do so is intimately linked to the development of other basic human capabilities.

Strengthening governance – by improving revenue collection, effective planning, policymaking and implementation – is vital across all issue areas. Africa faces many challenges in the coming decades. Yet, the ongoing transitions each come with opportunities which political leaders must seize to transform Africa's potential into tangible improvements for human development.

Notes

- 1 The report is available here: <https://issafrica.org/research/books-and-other-publications/african-futures-key-trends>
- 2 IFs leverages historical data (over 3 500 historical series), identifies and measures trends, and models dynamic relationships to forecast hundreds of variables for 186 countries for every year from 2014 to 2100. See <http://pardee.du.edu/understand-interconnected-world>. All figures are in constant 2011 US\$ unless otherwise stated.
- 3 North Africa's and Germany's median age is expected to be 31 and 50 respectively.
- 4 RP Cincotta, *The Future out to 2030: According to Demography*, 2013. In Steven Gale and Sarah Jackson (eds), *The Future Can't Wait*, United States Agency for International Development, Washington, DC, 2013 and H Hegre, J Karlsen, H Strand and H Urdal, *Predicting Armed Conflict, 2010–2050*, *International Studies Quarterly* 2012, 6.
- 5 United Nations Commission for Refugees (UNHCR), *Mid-Year Trends 2016*, 6 (<http://www.unhcr.org/statistics/unhcrstats/58aa8f247/mid-year-trends-june-2016.html>).
- 6 The World Bank. 2016. *The Potential of Intra-regional Trade for South Asia*. www.worldbank.org/en/news/infographic/2016/05/24/the-potential-of-intra-regional-trade-for-south-asia.
- 7 Martin Ravallion, Shaohua Chen and Prem Sangraula, *New Evidence on the Urbanization of Global Poverty*, World Bank, *Research Digest Volume 1 | Number 4*, Summer 2007, http://siteresources.worldbank.org/DEC/Resources/84797-1154354760266/2807421-1183396414833/The_Urbanization_of_Global_Poverty.pdf.
- 8 African Development Bank, Organisation for Economic Co-operation and Development, United Nations Development Programme (2016), *African Economic Outlook 2016, Sustainable cities and structural transformation*, <http://www.africaneconomicoutlook.org/en/theme/sustainable-cities-and-structural-transformation>.
- 9 Incidents with over 500 people killed.
- 10 Armed Conflict Location and Event Data Project (ACLED), Uppsala Conflict Data Program (UCDP), Heidelberg Institute for International Conflict Research (HIIC), and the Center for Systemic Peace.
- 11 HIIC, *Conflict Barometer 2016*, February 2017. https://www.hiik.de/en/konfliktbarometer/pdf/ConflictBarometer_2016.pdf.
- 12 The Global Terrorism Database (GTD) includes a two-part criterion for incidents to be included in its database. See the Codebook here: <https://www.start.umd.edu/gtd/downloads/Codebook.pdf>.
- 13 UNODC, statistics; and M Shaw and T Reitano, ISS, 2013, *The evolution of organised crime in Africa: Towards a new response*, <https://issafrica.org/research/papers/the-evolution-of-organised-crime-in-africa-towards-a-new-response>.
- 14 Such as the Democracy Index from the Economist Intelligence Unit (EIU), the Varieties of Democracy (V-Dem) project, Freedom House and Polity IV.
- 15 2015 is the most recent year for which Polity IV has data.
- 16 J Gerring et al, *Electoral democracy and human development*, Varieties of Democracy (V-Dem) Institute, Working Paper series 2015:9 (new version), February 2016, and CH Knutsen et al, *Economic Development and Democracy: An Electoral Connection*, V-Dem Institute, Working Paper Series 2015:16, November 2015, see www.v-dem.net/en/news-publications/working-papers/.
- 17 See www.afrobarometer.org.
- 18 Robert Mattes and Michael Bratton, *Do Africans still want democracy?*, Afrobarometer Policy Paper No 36, November 2016, p 2.
- 19 Ibid, p 16.

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