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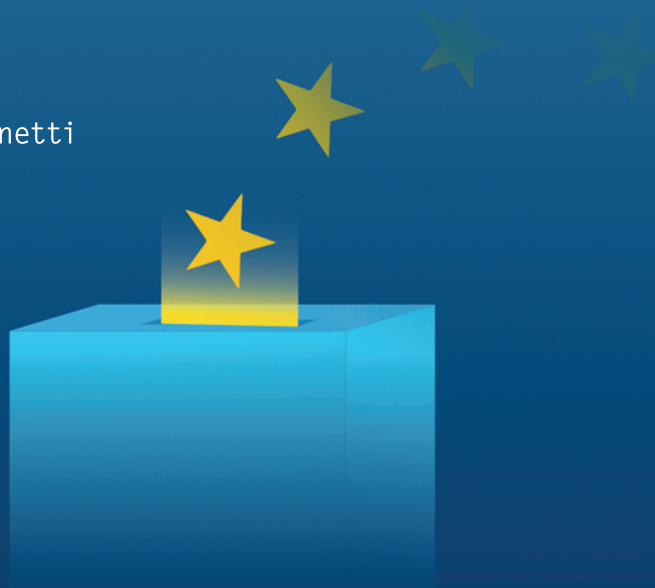
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Africa: The Next Eldorado or a Troubled Continent?

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European Parliament elections in May 2019 come at a critical time in the evolution of the EU as these will be the first elections after the expected departure of the UK (March 2019) and at a time when divergence on many issues characterises member state relations. Wider global developments weigh heavily on Europe with the return of hard geopolitics and efforts to undermine the global multilateral order. The European University Institute (EUI) wants to highlight the major issues that are at the heart of the political agenda at this juncture as a contribution to the debate. The papers are part of a wider programme on the elections including the development of a Voting Advice Application (VAA), euandi2019, and an online tool specifically tailored for mobile EU citizens voting either in their country of citizenship or residence, spaceu2019.

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Abstract

Africa is a young and fast-growing continent. It is urbanizing at a very high pace and progressing in income per capita, trade liberalization, human development and doing-business indicators. African countries are, however, very different from each other, with many still having a large informal sector, unstable institutions and unsolved ethnic struggles. This means that some countries can offer huge investment and trading opportunities, but others represent a risk, linked to migration, fragility and conflicts. This note highlights some recent positive 'patterns and trends' in the continent as a whole and the main challenges, suggesting that with changes in the environment and in the narrative around Africa, domestic and EU policies need to change. African governments need a long-term perspective: rather than just reacting to emergencies, they must tackle new challenges: market liberalization in a world of trade wars, unplanned fast urbanization and the quality of education, health and social policies in a resource-scarce environment. To exploit the positive spillovers of geographical proximity and not to leave the ground to China, the EU should envisage an innovative policy, also with a long-term view. Aid as in the past is not enough nor what is needed. For an ageing EU, Africa can become the main source of human capital, so the education of Africa's young generations is important for the development of both Africa and Europe. Furthermore, the EU can share its expertise in urban planning, new technologies and education. Training may be worth more than money for the development of Africa.

Keywords

Africa, EU development policy, Global Value Chains.

1. A young, growing and urbanizing continent

Africa is changing for the better: over the last 20 years its GDP has tripled and is now over \$2 trillion. The average GDP growth between 1999 and 2018 was around 5 per cent a year, against a rate of less than 3 per cent in the period 1980-2000 (the so-called lost decades).¹ The average rate, of course, masks much heterogeneity, but recently most African economies, not only the resource-intensive ones, have been resilient and are gaining momentum. Current projections (Brookings Institution, 2019) suggest that over the next five years twenty economies in sub-Saharan Africa² will be amongst the world's fastest growing economies.

However, Africa's recent high growth has not been accompanied by an increase in employment and this is an important challenge for domestic governments. Between 2000 and 2008, employment grew at an annual average rate of 2.8 percent, roughly half the rate of economic growth³ and between 2009 and 2014 at 3.1 percent (1.4 percentage points below growth). One of the main reasons for this development could be the fact that Africa has deindustrialized: its share of global manufacturing is smaller than in 1980 and the share of manufacturing in GDP is less than half the average for all developing countries. This suggests that many young Africans will not be formally employed in the industry sector, but rather in the informal sector. According to the ILO, if these trends continue, only about 100 million of the 450 million Africans expected to reach working age over the next two decades can hope to find 'decent work.'

The slow growth in jobs has in turn slowed down poverty reduction. Although 50 million Africans have been lifted out of poverty in the last twenty years and the proportion of poor people in Africa declined from 56 percent in 1990 to 43 percent in 2012, the number of the poor increased from 278 million in 1990 to 413 million in 2015. As of 2015, most of the global poor, in 27 of the world's 28 poorest countries which have a poverty rate over 30 percent, lived in sub-Saharan Africa. Furthermore, although global poverty has fallen, prosperity has not been fully shared.

While several human development indicators have improved in the past twenty years – the infant mortality rate has fallen by 22%, maternal mortality has dropped by 36%, literacy rates have risen to 70 percent, with many countries over 90 percent, and average life expectancy at birth has increased from 54 to 61 years – in half of the African countries investing in human capital is still key. Governments should promote access to tertiary education and improve education quality. In the past five years, education scores have registered a deterioration, suggesting that education outcomes are worsening. Enrolment levels are higher than before, but education quality and indicators measuring whether education is meeting the needs of the economy are worsening (Brookings Institution, 2019). Furthermore, while the average unweighted Gini coefficient declined (for sub-Saharan Africa), its standard deviation and coefficient of variation rose. This suggests that “the heterogeneity of inequality across countries, originally linked to land tenure and resource endowment, became more acute” and confirms that the “high level of inequality poses a serious challenge to realizing the overarching goal of ‘leaving no one behind’ by 2030” (UNDP, 2017, p. 19).

In a continent that in the next 20 to 30 years will add over a billion people to the total labour force⁴ and is likely to have a working population larger than China's, slow employment growth primarily

¹ Even after the recent 'crisis,' GDP increased by 3.6 percent in 2017 and is estimated to accelerate to 4.1 percent in 2018 and 2019.

² Ethiopia, Rwanda, Ghana, Côte d'Ivoire, Senegal, Benin, Kenya, Uganda, Burkina Faso and Tanzania will be the top ten in SSA.

³ Excluding Algeria, Burundi, Botswana, Cameroon, and Morocco, which experienced employment growth of more than 4 percent.

⁴ According to official estimates, the total labour force should pass from 620 million in 2013 to nearly 2 billion in 2063.

affects women and young people (ages 15-24). This is an important challenge since Africa is a very young continent with over 225 million young people, a figure projected to increase to over 320 million by 2030. Half of Africans are under 19 and nearly 60% under 24.⁵ In some countries, like, for instance, Nigeria, there are more babies born every year than in the whole of Western Europe. But to reap the demographic dividend, Africa needs a healthy, educated and skilled labour force. The high level of informality in Africa also constitutes an obstacle. According to the ILO (2018), the informal economy accounts for 50-80 percent of GDP, 60-80 percent of employment and up to 90 percent of new jobs in Africa, where more than 60 percent of the population perform low-paid informal jobs. Definitions of the informal sector may vary,⁶ but the trend is worrisome and little is known of the phenomenon, except that its nature is local (informal firms need to operate close to their workers' homes) and that the share of women outnumbers that of men (with unbalanced gender-related consequences).

Africa is also becoming increasingly urbanized as its population increases and people move from rural to urban areas. In many countries, the urban population is growing by more than 3% a year. Every year, around 24 million Africans are moving to cities and ten of the world's fastest growing cities between 2018 and 2035 are in Africa. Eight African cities are expected to more than double in population size in the next 15 years (UN-Habitat, 2018). This rising urban population with a relatively low per-capita income and a lack (or at best inadequateness) of urban infrastructure – including transport, clean water, sewage etc. is a serious cause for concern. In rapidly urbanizing areas, slums are frequent⁷ and several areas, even those surrounding business districts, are without paved roads, which makes them more vulnerable to extreme climate events. Most African cities are then 'physically fragmented,' with important consequences for people and firms, which are likely to miss the economic opportunities of globalization. UN-Habitat (2018) claims that "such inefficiencies in the design of the city can make urban living costs burdensome and jeopardize the potential benefits of agglomeration." Of course, the lack of infrastructure not only implies missing out on economic opportunities linked to market integration or foreign direct investment. The lack of clean water and sewage infrastructure, for instance, implies that diseases spread rapidly, amplifying the transmissibility of contagious ones and challenging the reaching of health-sustainable goals. Indeed, health is one of the still-unsolved big challenges (WHO, 2016).

Addressing these demographic changes and accompanying urban challenges is one of the main tasks for both domestic policy-makers and international organizations. GDP growth, the young population and the rapid pace of urbanization generate business opportunities in infrastructure, housing, health, financial services and other areas. Governments, and more recently also increasingly the private sector, plan to close these infrastructure gaps but many investors (especially foreign ones) share concerns about economic and political risks as obstacles to long-term investment and to the successful implementation of business strategies (European Report on Development, 2009). However, the rapid adoption of mobile and digital technologies (some of them developed in Africa, such as, for instance, Mpesa and mobile banking) could help Africa to leapfrog many obstacles such as the lack of physical infrastructure (phone lines, electricity etc. – see the European Report on Development, 2010) and many risks.

5 In 2015, 50% of the population in North Africa, 59% in Sub-Saharan Africa and 63-64% in other sub-regions were below 24.

6 For instance, for firms the criteria include registration status, size, tax status, compliance with social security legislation, the availability of accounting statements and whether the business has a permanent physical address.

7 In some countries, over 50% of the population live in slums, with peaks in Chad and the Central African Republic (almost 90%).

2. A low share of intra-Africa trade but a high potential for trade liberalization

The share of intra-African exports as a percentage of total exports has traditionally been low, especially when compared to levels in other areas.⁸ However, in the last twenty years it has increased from about 10 percent (1995) to around 17 percent (2017), suggesting changes in government attitudes to integration (and that some infrastructure problems and red tape have been lifted). Furthermore, the existing intra-regional trade tends to be concentrated. According to the World Bank (2018), about two-thirds of the regional demand for exports is accounted for by 10 countries, including South Africa, Côte d'Ivoire and the Democratic Republic of Congo. Bilateral trade is also more intense between countries that are closer (in distance) and have common sociocultural characteristics (i.e. it is driven by a gravity trade model).

With the explicit goal of increasing intra-Africa trade in a world which after many years of liberalization is now characterized by trade wars,⁹ increasing tariffs and other obstacles to trade, in March 2018 44 African countries signed the Continental Free Trade Agreement (AfCFTA). Five more countries joined in June. In principle the agreement creates the largest free trade zone since the creation of the World Trade Organization in 1995:¹⁰ a single continental market for goods and services with countries committed to cutting tariffs on 90 percent of goods and a customs union with free movement of capital and people. However, the free trade area has to wait until at least 22 countries submit instruments of ratification and this is a slow process. By July 2018 only six countries had done so: Chad, Eswatini (Swaziland), Ghana, Kenya, Niger and Rwanda. The AfCFTA is also complemented by other important initiatives, including the Protocol on Free Movement of Persons, Right to Residence and Right to Establishment, and the Single African Air Transport Market (SAATM). According to the Economic Commission for Africa (ECA), with the agreement in place intra-African trade is likely to increase by 52.3% by 2020. Compared to the situation with no AfCFTA in place, through the sole removal of tariffs on goods the agreement is estimated to increase the value of intra-African trade by 2040 by between 15 percent (or \$50 billion) and 25 percent (or \$70 billion), depending on liberalization efforts.

Not only trade, but also capital inflows are increasing and represent around 8 percent of GDP (2017). The composition of capital inflows has changed significantly in the last decade. According to the World Bank (2018) “the occurrence and interplay of three large external shocks (the 2007-08 global financial crisis, the 2011-12 European sovereign debt crisis and the 2014-15 plunge in commodity prices) have reshaped the composition and structure of financing in the region” (p.12). The main components of capital inflows are foreign direct investment¹¹ and foreign aid but portfolio investments (through international bond issuances) have substantially increased since 2013. Nigeria and South Africa, the region's two largest economies, account for 50 percent of FDI and the top 10 countries capture 80 percent. The main contributor to capital flows is China; investment toward Africa sharply increased after the 2015 FOCAC summit, where China committed \$60 billion to the continent. Flows have been geographically concentrated in oil-rich countries, like Nigeria and Angola, and in the transport and energy sectors and are the object of lively discussion amongst experts and policy-makers.

⁸ In Europe, the share is around 69 percent, in Asia 59 percent, and in North America 31 percent.

⁹ The US, for example, has re-negotiated NAFTA, which is now called the United States-Mexico-Canada Agreement, pulled out of the Trans-Pacific Partnership and imposed tariffs on billions of dollars of Chinese goods, including shoes and consumer electronics; China has responded in kind by proposing tariffs of its own.

¹⁰ According to the UN Economic Commission for Africa (ECA), if all 55 African countries were to join the free trade area, it would be the world's largest by number of countries, covering more than 1.2 billion people and a combined GDP of \$2.5 trillion.

¹¹ The average share of foreign direct investment (FDI) in total inflows increased from 24 percent in the 1990s to 75 percent during the 2000s.

3. Opportunities to enter international production networks despite (or thanks to) high heterogeneity

African countries are very diverse in terms of their populations, development levels, GDP levels¹² and growth rates, and also in terms of institutional stability (which is also linked to ethnic composition). Nigeria is the largest country with nearly 190 million people of different ethnicities, often in conflict. Ethiopia and Egypt have over 90 million people each. On the other hand, most other countries have populations below 20 million. Just nine countries (of the 54) make up three-quarters of Africa's GDP and in 2030 three countries – Nigeria (20 percent), Egypt (17 percent) and South Africa (11 percent) – are likely to account for almost half of the whole African household consumption. Many smaller countries, however, are growing quickly and increasing their share of continental GDP and consumption. Their heterogeneity implies different possibilities of entering international production networks and exploiting the benefit of global value chains (GVCs). For many developing countries, participation in GVCs plays an important role in the process of structural transformation, contributing to the creation of more productive, higher-quality and higher-earning jobs. However, reaping the benefits of GVC integration does not come automatically, and the dynamics shaping the development of GVCs may also represent a threat to sustainable employment, particularly for those without portable skills or who face labour market segmentation. GVC integration is also likely to have distributional impacts, both through employment and wages (which are typically higher in firms involved in GVCs). Trade agreements such as AfCTA and policy plans such as the Chinese belt and road initiative affect the development of global value chains by linking markets, lowering transaction costs and contributing to regulatory conformity. African countries still have to fully exploit the possibilities provided by specializing in individual tasks rather than in whole production.

GVC-oriented trade offers significant opportunities, especially for small countries, to benefit from integration by changing the nature of their competitiveness. In the past, for a country to become an exporter it needed to have the capability of producing the whole product and the scale to assemble it (e.g. the car industry was a business for few!). Under the new GVC dynamics, a developing country can specialize in individual tasks and trade in intermediates. In this sense, GVCs “denationalize comparative advantage” (Taglioni and Winkler, 2014), as lead global firms construct global production networks by exploiting the most competitive locations for specific activities. African countries are still typically engaged in low value-added phases of production but the more they specialize the more they can enter higher value-added phases. Recent developments suggest that some countries – Ethiopia, Kenya, Seychelles, South Africa, Tanzania – have started engaging in international production networks in manufacturing, agriculture and agro-business and, to a lesser extent, transport and tourism, and have benefited the most from deeper integration (Allard et al., 2016; Del Prete et al., 2016). To specialize in phases of production is simpler, attracts foreign direct investment and creates jobs. However, terrorism, conflicts, natural disasters and economic crises can discourage participation in international networks (e.g. over the last two decades Nigeria has experienced at least 2500 violent events, with important consequences). This is still an important challenge for Africa.

4. African domestic policies

African domestic governments are faced with many challenges, some of them already cited, such as very rapid urbanization, demographic dividends and a lack of decent jobs, especially for women and the young. As mentioned above, for years poor infrastructure has been one of the key impediments to investment and growth in Africa. For example, nearly 600 million Africans still lack access to electricity. However, significant progress has been made: Africa's annual investment in infrastructure has doubled

¹² 11 countries – Burkina Faso, Côte d'Ivoire, Ethiopia, Ghana, Guinea, Guinea-Bissau, Kenya, Mali, Rwanda, Senegal and Tanzania – experienced growth rates above 5.4 percent in 2015-18 (World Bank, 2018). These countries house nearly a third of the region's population and account for 20 percent of its total GDP.

to around \$80 billion a year since the beginning of this century, suggesting a strong commitment by domestic governments (and international organizations).

Another big challenge is represented by migration. Here, the perceptions from Africa and the EU are very different. Because of high costs, most African migrants move within the region and do not leave the continent. Between 2015 and 2017, for example, the number of African migrating within the continent jumped from 16 million to around 19 million, while those moving outside the continent passed from 16 million to 17 million. The main migration corridors are in west and southern Africa and are economically driven, connecting migrants to jobs in farming and informal trade. Nigeria and South Africa are the countries that most African migrants move to. Regional communities such as ECOWAS have recently made the free movement of people an important step in their strategies, launching regional passports and abolishing visa requirements. In March 2018, the African Union (AU) adopted a continent-wide protocol for free movement that could further enhance regional migration.

A third challenge is the business environment, which has not been conducive to investments. However, according to the Doing Business Report (2018), in the last few years the majority of reforms have been made in Africa (a total of 905 reforms in 15 years). Many African countries started with weak regulatory institutions and costly inconvenient business regulation processes, but have been converging towards international standards, even though despite these improvements large gaps – mainly due to poor infrastructure, weak governance, a lack of access to financial resources and underdeveloped legal institutions – still exist between their performance and that of OECD countries. Across Africa, there is still much heterogeneity. Mauritius and Rwanda, for instance, rank highly (respectively 20th and 29th in the world) in overall ease of doing business, while Somalia and Eritrea among the worst.

A fourth challenge is the adoption of new technologies. These could create jobs, for instance by stimulating new types of economic activity. However, the concern of policy-makers is that rising productivity could lead to fewer people being needed to perform the same tasks, challenging job creation. With Africa's youth population growing rapidly, the impact of technological advances on employment is certainly an issue for concern and raises the question of how to prepare the young for new sectors and how to train workers in STEM subjects (science, technology, engineering and mathematics), which currently lag behind in Africa.

5. EU policies towards Africa

Africa has a huge potential for trade, energy and investment, which are much needed in an 'old' continent such as the EU. While Europe is facing an ageing population, Africa is living through a youth bulge. Both continents could benefit from migratory movements, but if things go wrong they can both be subject to economic strain and political unrest.

The EU can unlock Africa's potential in a series of ways: "by developing the right mix of migration, mobility and integration policies; by supporting education and sustainable development; by bridging fair trade and economic integration objectives; and by favouring sustainable agriculture and green growth" (<https://europa.eu/globalstrategy/en/redefining-our-relationship-africa>).

Back in 2005, the European Consensus on Development formulated the eradication of poverty in the context of sustainable development as the main objective of EU development cooperation,¹³ including the pursuit of the Millennium Development Goals (MDGs). These objectives have been reiterated and reinforced in various EC communications over the past few years. The post-2015 agenda could help the EU establish a fairer partnership with Africa.

¹³ European Consensus on Development, 2005.

The world has changed dramatically in the past few years, and with it the narrative around Africa. Cooperation cannot be rooted in foreign aid and a paternalistic view. It must be on an equal basis to address large economic and societal challenges (movements of migrants due to conflicts, uncertainty and climate change; competition for scarce resources etc.), to achieve the Sustainable Development Goals and to enhance inclusive growth both in developed and developing countries. For an ageing EU, Africa can become the main source of human capital, so the education of Africa's young generations is important for the development of both Africa and for Europe. Furthermore, the EU can share its expertise in urban planning, new technologies and education. Training may be worth more than money for Africa's development.

International cooperation activities seem to have the scale and scope necessary to maximize impact but the level of coordination needs to be higher than it is now. While the EU has acknowledged that the policy cannot be 'one size fits all,' given the heterogeneity of the countries in the continent, Europe and Africa have an interest in working together on strategic development and interests.

6. Conclusions

Many African economies are more resilient and better placed to cope with crises than before. The continent is young, rapidly urbanizing, opening to trade, attracting foreign capital, integrating (to some extent) into international production networks and making progress in human development and in doing-business indicators. These elements of appeal may, however, be offset by the persistence in many African countries of a large informal sector, unstable institutions and unsolved ethnic conflicts. Furthermore, even patterns, such as the 'demographic dividend,' which are seen as a great opportunity for Africa may turn into trouble because the skills of young Africans may not be appropriate. This implies that unemployment is highest among the most educated young people but a lack of opportunities to use their skills may trigger undesirable consequences (migration and/or violence). In other words, a growing population of better educated and urbanized young people encountering few jobs is a crisis in the making. What is probably one of the main challenges to be tackled by domestic governments is a long-term process requiring efficient investments in human capital.

African governments must tackle new challenges with no set policy tool. They cannot just react to emergencies, such as extreme climate events, situations of fragility, economic crises, as in the past and leave active policies behind. Market liberalization in a world of trade wars, unplanned fast urbanization, the quality of education, health and social policies in a resource-scarce environment are issues that can only be addressed with a long-term perspective and envisaging new policy tools and new forms of cooperation with the other main actors on the international scene.

Moreover, the EU should envisage an innovative policy toward Africa with a long-term view. The aim is to exploit the positive spillovers of geographical proximity and not to leave the continent under the influence of countries such as China, which has had a very effective foreign policy, integrating its aid and foreign direct investment and targeting countries in situations of fragility and conflict. For the EU, aid as in the past is not enough nor what is needed. For an ageing EU, Africa can become the main source of human capital, so the education of Africa's young generations is important for the development of both Africa and Europe. This means, for instance, that migration has to be seen in a new way, through new lenses. Furthermore, the EU has a set of tools that can be shared on an equal basis: its expertise in urban planning, new technologies and education programmes. Training may be worth more than money for Africa's development. Finally, for Africa it is true that the 'one-size-fits-all approach' cannot be followed.

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