

# The Africas of 2029

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# The Africas of 2029

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Real progress in diversification in some economic areas, as well as improvements in public policies, have modified the general conditions of development on the African continent since the 2000s. In politics, apart from the demands of formal representative democracy, states need to be reconstructed in order to integrate marginalized regions and develop regional and continental co-operation.

politique étrangère

## The economic dimension

The starting point for the development of African economies, typical of the 1990s, was a dual economy. In this system, the intensive extraction of raw materials attracted the majority of investment in terms of financial, technological, and human capital, and existed alongside an extensive, informal, and essentially agricultural sector, which provided the majority of jobs for a young and impoverished population. Structural adjustment plans, the breakdown of or reduction in public services, the AIDS epidemic, political instability, and precarious security contexts combined to give the 1990s the rather unflattering sobriquet of the “lost decade.”

The 2000s have marked a turning point in terms of growth. Although this growth is mostly due to an improved international context and is strongly influenced by China’s demand for raw materials (which has reached an historic high), the “African emergence” has been accompanied by major qualitative changes.

### *Limited diversification*

Although it is not widespread, we can detect a trickle-down effect, as a growth in national Gross Domestic Product (GDP) is accompanied

by an improvement in middle-class income levels. The continent is now seen as a “frontier market,” which gives many economic players greater confidence. Most of this new prosperity is shared between the leading companies in four major economic sectors: large agri-food groups, logistics firms, large telecommunications operators, and financial services.

Unlike investments in the extractive industries, these new foreign direct investments (FDI), are distinctive in that they create local employment and contribute to creating new opportunities for entrepreneurship in formal and informal sectors. They therefore contribute to feeding a virtuous circle of economic growth. However, these sectors also enable an increased appropriation of income generated in the informal sectors of these economies.

### *The restoration of public policy in the economy*

Strong growth – along with changes in the ideological position of international financial institutions and development agencies, which are softening their ultra-liberal foundations – is increasingly restoring the role of public investment.<sup>1</sup> This is happening within fairly typical frameworks, as can be seen from five-year budgetary plans that now include “poverty reduction” objectives. The emphasis is on promoting “good governance” – with the routine requirement to establish mechanisms to monitor and evaluate public policy – and the need to change the role of the administration to make it an effective regulator capable of creating conditions conducive to investment.

In fact, despite having a clearly liberal hue (although it is less bright than previously), social projects – including investment in basic infrastructure and institution building – are receiving renewed attention and are more willingly allocated financial and human resources. The secondary sector, however, remains left behind. Although there are a few exceptions, the continent is still characterized by deindustrialization – which no one wants to interpret as a case of “leapfrogging,” whereby services have become predominant without the economy passing through the stage of industrial development. In any case, although planning exercises have been reinvigorated, the results generally fall short of the creation of industrial policies worthy of being called as such.

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1. These investments are directed toward structural public infrastructure projects that are not necessarily in sectors that create many jobs.

### *An enlarged portfolio of strategic allegiances*

The large emerging economies – which are new purchasers of raw materials as well as investors – are offering African governments more strategic opportunities in terms of alliances, particularly with regard to financial matters. However, their involvement reduces the influence of Western powers and international aid organizations. This is less in terms of the general direction of public policy (over which there is a general consensus) than in influencing the choices made over the running of projects, which are becoming more diversified. The trend is towards an increase in public interventionism in the economy, in response to liberal-leaning reforms promoted by Western partners.

### *Beyond the liberal paradigm?*

Although the persistence of rentier models remains strong, economic diversification is generally stated as an objective and placed at the heart of major public policy goals. The aim is both to reduce dependence on fluctuations in demand and in the prices of raw materials, and increasingly to create employment, especially for young people, whose demographic weight is key. Although talk of the “African emergence” has lost some of its luster over the last five years, this is due not only to a drastic reduction in global demand for raw materials, but also because the economic potential linked to local markets seems to have reached its limit, insofar as the middle classes have certainly grown, but are now in a state of stagnation. One of the arguments highlighted to explain this slowdown is that despite an increase in the standard of living among the populations that now form the middle classes, the vast majority remain poor and reliant on the subsistence economy. Questions about improving agricultural output and employment are therefore central to boosting growth, which has run out of steam.

In the present context, “the promotion of conditions conducive to investment” in liberal terms – to the exclusion of all other measures – seems to have reached its limits. Although the promotion of stable macroeconomic contexts (such as the implementation of good governance measures and offering tax incentives) has improved the image of the continent and restored it as a destination for direct investment, what motivates investors is access to new markets. Goods produced locally for export have essentially remained the same or have barely changed. Although the need for economic diversification seems self-evident, the conditions required to produce employment are of a major and critical uncertainty, insofar as the institutional approach of opening up markets is insufficient in itself to promote the structural changes necessary for sustainable development.

## The socio-political dimension

### *Democracy: A reality or an illusion?*

Beyond its central economic role, institution building is at the heart of political dynamics in Africa. Liberal institutional reforms not only break up the state's economic functions; they also change its political structure.

Recommendations concerning the implementation of formal democratic processes have borne fruit in an increasing number of countries where political transitions have taken place smoothly. But it must be noted that the emphasis on the formal character of electoral procedures has led established elites to employ a variety of strategies that maintain the formality of the procedures, while stripping them of their substance. Alongside cases with obvious irregularities (which are no longer the norm), we are more likely to see long-term projects, such as those that aim to limit the development of opposition movements, increase the grip of the executive branch over the legislative and the judiciary in order to legally enforce changes in electoral law, or enact decisions that favor the incumbents.

Declaring elections to be free and fair is in many cases becoming a complex exercise. Even voter turnout – which is supposed to at least indicate a degree of democratic endorsement of those elites that benefit from a *de facto* political monopoly – must be taken with a pinch of salt in contexts where police actions influence voters' behavior, as abstention can be seen as a lack of support. In many cases, the risk associated with challenging the ruling elites is seen as a leap into the dark, and for most it is a case of better the devil you know.

### *Security challenges and territorial sovereignty*

There are two essential prerequisites for establishing or maintaining peace. First, the absence of any major barriers to economic activity and a climate that enables populations to meet their most basic needs. Second, state control – particularly in terms of security and defense –, in order to contain the spread of socio-political movements that would threaten sitting governments in an anti-constitutional manner. Such challenges are particularly evident in countries that cover a large geographical area, such as in the Sahelo-Saharan strip, the Gulf of Guinea, the Horn of Africa, and around the African Great Lakes. It is not a coincidence that these four regions are the epicenters of major African conflict zones.

Although these regions have historically been the site of large-scale armed conflict involving direct or indirect confrontation between belligerent states, for the last decade the trend has been towards low-intensity

conflicts, with dispersed outbreaks of often cross-border violence caused by a multitude of actors responding to local and current events. For example, we may think of groups such as Al-Qaeda in the Islamic Maghreb (AQIM), whose initially ideological demands were supplanted by organized crime with mainly economic objectives. The same applies to a wide range of armed groups in the east of the Democratic Republic of the Congo (DRC), including Mai-Mai, whose ambition to overthrow the government is merely a distant goal, with artisanal mining and the smuggling of ore taking precedence over any other concerns.

### **Conflicts as a response to local and current events**

Although these areas of low-level conflict remain localized, a *de facto* equilibrium (similar to that established with populations whose democratic representation is less than ideal) has been established between those involved in the conflict systems and the state. In these cases, the state agrees to a partial surrender of sovereignty in part of the national territory in exchange for the armed group relinquishing all expansionist ambitions beyond an area large enough to allow for very profitable economic activity. However, it is clear that this state of equilibrium is unstable and has the potential to collapse into major political instability, especially when it is built on social factors and a deep-rooted, long-term political and economic expression.

#### *The social roots of anomie*

Centers of anomie, even dissent, also correspond to areas of social marginalization and, consequently, to areas of economic and political marginalization. Although Boko Haram originated in the Lake Chad Basin, it was the result of a lack of state authority in Nigeria, Cameroon, and Niger. These areas had been abandoned by their respective states, devoid of defense or police forces, public services and investment, and, in the case of the populations of northern Nigeria, political representation. This state of affairs aggravated their geographical isolation from their countries' economic and political capitals. Furthermore, trade in the region was essentially cross-border and confined to the Lake Chad Basin. The fact that Chad was clearly not the target of the Boko Haram movement is no doubt partly due to the fact that N'Djamena is relatively close to this area. However, the country was confronted with similar problems far from its capital, on the Libyan border to the north, on the border with the Central African Republic to the south, and on the border with Sudan's Darfur region to the east.

In these regions characterized by low-intensity conflict, the social marginalization of populations living in abandoned territory feeds insurrectionist

movements with personnel and resources. Involvement with such movements may be voluntary or involuntary, depending on whether the explicit or implicit demands of these movements match people's own aspirations. Ignoring the nature of these links means that a purely security-based approach to the fight against terrorism can only have limited results.

Furthermore, moves towards decentralization (which no one expected to be a first step towards the re-establishment of a social contract with the state) are also insufficient. In practice, they have taken the form of deconcentration, and are currently a long way from any sort of autonomization and integration of peripheral regions into the political dynamics of decision-making centers, except in a very stratified and top-down manner. Even in these cases, the allocation of resources and administrative and financial assignments to different areas are often insufficient to create a substantial change to the forces that drive anomie.

### *Regional integration and cooperation*

Although cross-border trade is not new, major political efforts have now been agreed to promote formal economic integration. This can be seen in the Tripartite Free Trade Area Agreement signed in 2015, and the African Continental Free Trade Area Agreement, which was signed by the vast majority of African countries in 2018. However, although the agreement has been signed, it is far from being ratified and difficult technical negotiations mean that it will be quite some time before it is put into practice. Once again, the tendency towards some level of inertia is clear, and it is increasingly difficult to interpret it as anything other than a reluctance to renounce national sovereignty in favor of supranational bodies beyond a certain point.

These problems with integration can also be seen in the very minimal level of intra-African cooperation, including in response to questions where transnational solutions seem indispensable. In terms of security around Lake Chad, coordination between national defense forces is limited, and insurrectionist movements can capitalize on extensive cross-border mobility. Conversely, improvements in relations between the DRC and its neighbors to the east have been central to reducing low-intensity conflict in the Kivu region. In addition to the political difficulties with integration, there are also problems connected to the financing of priority activities, as can be seen in the very slow start to joint operations by G5 Sahel.

### *Legitimizing strong states*

Although sitting governments may sometimes lack democratic legitimacy, a *de facto* balance is struck as long as a sufficient level of economic freedom

is possible. However, this balance is delicate as it is fed by an increasing sense of anomie managed through institutional responses. At the national level, institutional mechanisms that would give populations better representation (especially in marginalized peripheral areas) could be considered in addition to regular elections. At the regional level, there is a need to explore modalities of cooperation that would mitigate the real or perceived risks of a loss of sovereignty to supranational bodies. This is particularly necessary for smaller countries, as there are certainly expansionist tendencies within these bodies, along with competition for dominance between larger countries and their smaller neighbors, as well as between the African giants themselves.

### **Environmental and socio-cultural dimensions**

#### *A lack of environmental concern*

In addition to the economy and security, environmental risk is another major challenge that calls for a concerted response. Unfortunately, once again, multilateral approaches to tentative agreements on managing the effects of global warming are most evident between African countries and their Western partners. Public policy in this area suffers from a silo mentality that limits its reach. In a context of significant population growth, the possibility of climate shock on cereal production will have consequences that are difficult to imagine.

However, we can already envisage increasing demographic pressure on urban areas due to factors such as an acceleration in rural flight, heightened political competition for arable and pasture land between farmers and breeders, and a rise in migration flows towards the north, not to mention humanitarian and health crises.

The international community's reluctance to take action on climate change is worrying. Although the predominance of short-term thinking seems to have run its course and there seems to be a more vivid awareness of environmental challenges, paradoxically it has become increasingly difficult to justify allocating significant resources to problems that are still seen as distant, both in terms of geography and time.

#### *Different forms of cross-cultural values*

If we are to believe those who lament the trend towards the homogenization of values (due partly to the increasing adoption of information technologies and Western cultural hegemony), we are still waiting for the cultural dimension of development to be taken into account. In fact,



changes in cultural systems reveal less a convergence of values than a form of syncretism, whereby external societal factors are integrated into resilient cultural backgrounds. Particularly revealing in this regard are family structures. At first glance there may seem to be a decline in lineage structures in favor of the nuclear family, but this is superficial.

The urbanization of populations and the economic and spatial constraints that go with it explain the development of nuclear family units. However, in reality, they remain integrated within complex systems. This can be seen, for example, in strong financial interdependence, the movement of young people between different family units, and the persistence of lineage considerations when it comes to marriage or the management of family estates, whether in terms of physical, financial, or social capital.

These lineage, or relational, dynamics remain strong structural elements, the ramifications of which run deep in all social relations (including in politics) where access to power structures – and by extension to economic opportunities – can be strongly influenced by belonging to identifiable family groupings that are integrated into larger social groupings. The nature of the lineage system is therefore changing in form, rather than in substance.

### *The resurgence of religion*

Another aspect, which reflects an underlying trend toward change, is the explosion in membership of reformed religious movements such as the Pentecostal churches or even some fundamentalist Islamic movements.

This trend is important for two main reasons. First, it can be accompanied by a redefinition of identity-based allegiances according to religious affiliation rather than superstructures based on lineage. This can result in the development of new socialization strategies, which may potentially be decoupled from more traditional alliances within the extended family, whether that is at the level of the clan or the ethnic group. This type of dynamic can particularly be seen in the urban centers and among the poor and lower-middle classes. Networks of mutual support and of the management of estates – which used to be set in the context of extended family structures – are eroding with population growth. Social groupings that are newly formed around a community of faith represent an alternative to traditional mutual-support networks that are ill-suited to current demographic and economic realities, especially in urban centers.

Second, the redefinition of a sense of identity according to faith – which is no longer necessarily connected to ethnic grouping – is more inclusive than lineage systems. As a result, these faith-based groups have significant potential for political expression. This has already been seen in the extreme examples of movements such as Boko Haram in West Africa, the Seleka and Anti-Balaka movements of the Central African Republic, or even the growing role taken by religion during the last conflict in Côte d'Ivoire. This is also due to the demographic weight of these denominational groupings (which in some cases can reach almost a quarter of the voting age population), their relative socioeconomic homogeneity, and their tendency toward fundamentalism and the promotion of everyday morality to the detriment of more metaphysical spiritual considerations. In a more moderate context, Magufuli's position on morality – which is grounded in a strict form of Protestantism – was a significant factor in his election in Tanzania.

### Identity-based belonging and denominational considerations

The recent banning of many Pentecostal churches in Rwanda has also demonstrated a desire to limit the influence of these diverse, fragmented movements that are typically run by religious entrepreneurs. Therefore, as long as repression is not prevalent, opportunism and the establishment of clientelist relationships are acceptable in relations with the state. This type of relationship establishes a link and enables a degree of control in the management of the population's demands. The risks of a rapprochement – or even a marriage – between political positions that are more radically critical of the status quo, and the types of socialization brought about by these new forms of religious practice, are real. The development of these new forms of spiritual practice – especially in terms of their capacity either to crystallize the demands of a marginalized majority beyond ethnic lines or else to contain them – remains critically uncertain.

### Two scenarios in ten years' time

#### *A scenario based on current trends*

Electoral cycles proceed without any major surprises. Although opposition movements have freedom of expression, this is only really the case during electoral periods and is limited at other times. Incidentally, elections are rare because those in power argue that they are very expensive to organize considering financial constraints, the strict application of which is made selectively. On the other hand, although opposition movements have a significant electoral base, the fact that they are fragmented along regional lines results in votes being dispersed, to the benefit of the ruling

elite, which has no difficulty in getting re-elected. In fact, a degree of electoral competition can be seen in higher-stakes contests during primaries for successors to outgoing presidents.

This ruling elite – which has historically been secularized while maintaining good relations with traditional religious movements – has increasingly developed clientelist relationships with major new religious movements, whose popularity has been booming. The challenge is for the ruling party to increase its base in ways that go beyond identity-based belonging and are founded on a declared community of faith. Those religious movements that are less inclined to accept influence from the political power are subjected to forms of repression – some more subtle than others – that keep them in a state of marginalization, such that their inclination to challenge the status quo (including in an extremist fashion) remains contained either by a geographical distance from the centers of power, or by police action.

The effectiveness of this type of strategy results in little inclination to envisage major changes in public policy, particularly in respect to the economy. In fact, the extraction of ores and the export of unprocessed, or minimally processed, agricultural products remains the norm. The middle classes have reached around 15 percent of the population and remain more or less at this level. This enables a degree of economic diversification, but this is limited to transport and telecommunications services and, to a lesser extent, financial services and the distribution of imported consumer goods.

Bilateral relations with China develop to the detriment of older links to the Western powers, whose aid is conditional, unlike China's. On the other hand, infrastructure projects – the building of which is China's hallmark – are essential for governments insofar as they give immediate positive returns for the economy and become symbols of successful development despite unflattering macroeconomic indicators that are dependent on the international context.

Traditional forms of international aid are being eroded. Due to a tightening of monitoring procedures, funds are not reallocated unless positive, quantifiable results are observed, which is difficult in a context where interactions between economic players and public authorities are poor. This trend toward the erosion of aid is reinforced by a tense geopolitical situation where the United States is suspicious of China's increasing influence in Africa and is also increasingly inclined to demand that its African counterparts make a choice. As for regional integration, it is at a standstill as the ruling elites are essentially focused on maintaining their hold on the machinery of government.

The most marginalized populations, especially in the most peripheral rural areas, pay the price for this decrease in aid. Rural flight, which was already significant due to heightened demographic pressures and climate change, remains at a high level. Population movement aggravates a difficult security situation in peripheral areas, while competition for land between rival social groups intensifies and increasingly tips over into violence.

In urban areas, a barely controlled influx of people from rural areas leads to overcrowding in working-class districts and increased tensions between established residents and newcomers. Here too, tensions regularly tip over into violence of varying severity, although it remains confined to the most disadvantaged areas. Generally speaking, this sort of environment encourages criminality that, over time, becomes organized and creates no-go zones, not only in peripheral rural areas, but also in urban centers.

In short, the dualism that initially characterized economies has spread to the field of security. There is a stable center and an unstable periphery, and, in the urban centers, inequality is increasing and leading to a very clear differentiation between well-off and working-class districts. Insofar as the authorities have the skills and resources to contain these pockets of instability to more or less confined areas, any effort to address the causes is put off and the status quo continues.

### *An optimistic scenario*

An increased level of political competition has backed the traditional ruling party into a corner. To maintain its dominant position, the party considers its position carefully and begins contemplating a change of direction. Despite an average economic performance, the persistence of a rentier system that is structurally ill-suited to creating employment has contributed to giving substance to populist criticism from opposition movements that want to do away with the old party, whose glorious anti-colonial heritage is but a shadow of its former self. This process of self-reflection is also prompted by a change in party leaders who are younger and able to keep a critical distance from the liberal experimentation that was agreed to by their predecessors.

The idea that the recommendations of international financial institutions on cleaning up the macroeconomic framework and the regulatory environment must be backed up with the creation and implementation of an industrial policy aimed at capitalizing on the country's comparative advantages of (among others) having a young, working-age population,

was quickly adopted. Structures have been created not only to promote investments in sectors that are unsuited to spontaneous investment from private actors, but also to directly make some of those investments as a first step. In the medium term, the successes reaped contribute to removing the hesitations of businesses that would previously have favored Southeast Asia, but are now ready to explore new ground due to a tense geopolitical context resulting from the difficult relations between China and the United States.

To this end, a balanced strategic position is adopted toward relations with China on one hand and traditional aid agencies on the other. China has become an indispensable partner in the financing of physical infras-

### **A new relationship with China?**

structure, but everything possible is done to prevent countries from falling into a level of debt that could result in a loss of sovereignty. The increased pressure on budgets that results from this is significantly compensated for by effective use of international development aid, which is based on careful planning and dynamic coordination between the public sector and aid organizations.

Well-designed programs that focus on education and increasing agricultural productivity allow rural populations to escape poverty, while the progressive development of the new industrial structure contributes to the relocation of rural populations to urban areas with good living conditions. Alongside this, substantial efforts are made to increase the population's general level of education and skills, especially in urban areas, so that the country becomes more attractive.

Policies put in place by several countries to promote cooperation on a number of issues, such as security, public health, and monetary policy, also increase coordination in the implementation of industrial policies. Increased competition in the economy contributes to a process of market integration both at a regional and continental level, which gives the African Union increased weight and results in economic integration and a louder voice in international affairs. Regional cooperation is not limited to the economic sphere, but also extends to defense issues and immigration and environmental policies.

Pockets of instability relating to security – the continued existence of which results largely from cross-border smuggling – are economically stifled and concerted military action contributes to disbanding those criminal gangs that remain active. The improvement in the security situation is backed up with a reform of the processes of decentralization that were

rather tentatively started, and results in real devolution of powers within nations. Public investment in peripheral areas becomes more efficient, and therefore contributes to rebuilding links between the state and the populations in these areas.

African nations are now on the path to sustainable, equitable economic growth. And although they remain subject to the uncertainties of the international situation, this is more manageable, insofar as they are now, and will continue to be, driven by an institutional logic that is both homegrown and constructive.



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### Keywords

Africa  
Economic development  
Conflicts  
Government reform

