ONE

The African Century

INTRODUCTION

By 2050 Africa's youth will be 10 times the size of the youth population of the European Union.[1] This demographic shift will be Africa's biggest challenge, but it also provides its biggest opportunity. Demographic changes are placing the continent on the brink of what could bring a 'demographic dividend' – but only if the right action is taken at the right time. That time is now.

The continent's population is forecast to rise to roughly 2.5 billion by 2050,[2] with half of all Africans under the age of 25,[3] and by some predictions will continue to grow to reach four times its current size within the next 100 years.[4] This growing population needs jobs that provide dignity and income, while the dynamism of a young and motivated population could challenge the poor governance that has held the continent back for decades.

By taking action now, not only Africa but the whole world could benefit from the economic growth that this new generation could foster. Through tackling corruption, improving infrastructure and prioritising job creation, **African leaders have the opportunity to ensure that the 450 million new workers entering the economy between 2015 and 2035 (22.5 million every year) have access to quality employment opportunities**.[5]

Without action, the world could see a destabilising demographic division, with severe consequences for regional and global security well into the 21st century. If current trends continue, by 2020 the unemployed population in Africa (41.4 million) will roughly equal the entire employed population of Germany (40.7 million).[6] Political and military leaders have recognised that millions of people without opportunities, skills or hope will be vulnerable to extreme poverty, extreme climate conditions and extreme ideology. That is a very worrying prospect.

While governments in Europe and North America are struggling with the rise of populism and inequality and some African governments are struggling with conflict, hunger and environmental shocks, many African governments are forging ahead with strategies and plans for harnessing the digital economy, the power of agriculture and the opportunity of youth. But to harness this opportunity, Africa needs integration into the global economy and it needs public and private investments. The world needs a new partnership with Africa.

This report presents evidence on the risks and opportunities of this African youth bulge and **calls for a new partnership with Africa with increased investments in education, employment and empowerment to support a programme of economic and policy reform across the continent** – a plan that, if successful, could **lead to a rise in gross domestic product (GDP) worth $500 billion a year, equal to about one-third of sub-Saharan Africa's current GDP, for the next 30 years**.[7] In terms of social returns, stability and potential future conflict avoided, the return on investment is far higher.

AFRICA'S FUTURE IN NUMBERS

Today, the unemployed population in Africa is greater than the entire population of Canada.[8]

In the next five decades, there will be nearly 12 times more young people in Africa (1.4 billion) than young people in the entire European Union (121 million).[9]

If we do not take action now, by 2020 Africa's unemployed population will equal the employed population of Germany; in just 50 years it will be half of the entire employed population of Europe.[10]

With the right policies in place, tackling corruption, improving infrastructure and prioritising job creation, African leaders have the opportunity to ensure that the 450 million new workers entering the economy by 2035 (22.5 million every year) have access to quality employment opportunities.[11]

1. WHY IS THIS AFRICA'S CENTURY?

The African youth population will be twice the size of the entire EU population in less than 20 years.[12]

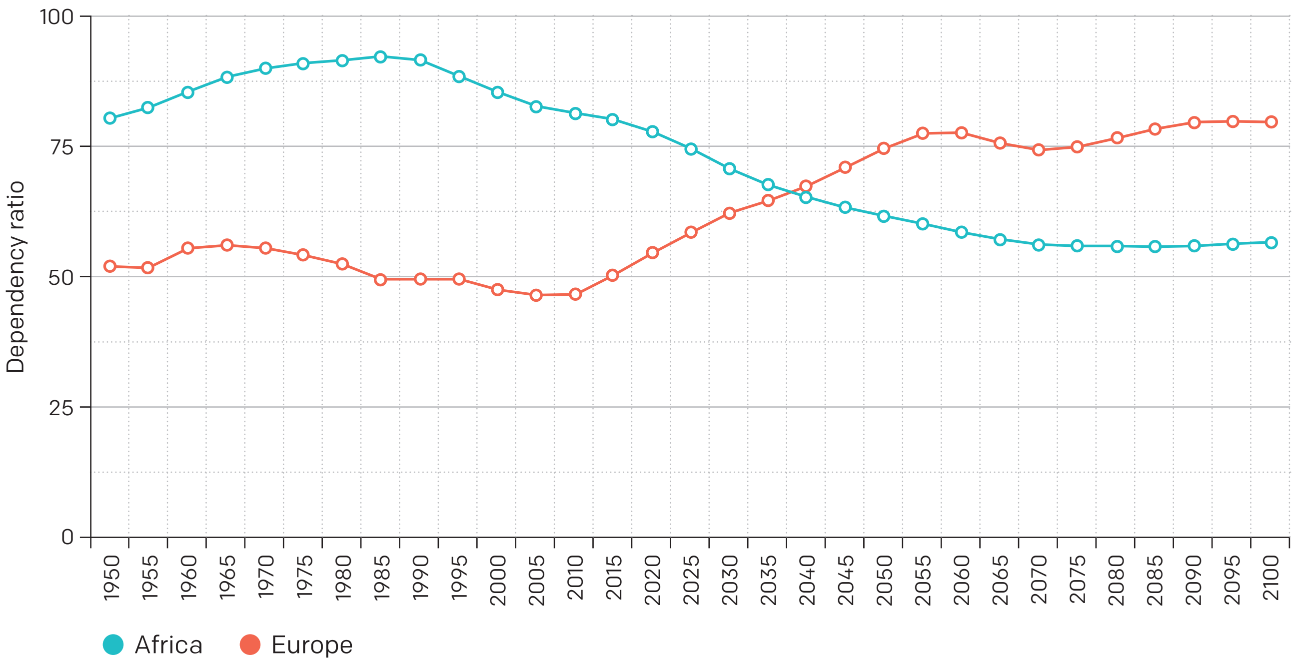
Dividend or disaster?

By 2034 the African continent will have a larger working-age population than either India or China, and a large number of that population will be under 25.[13] As the continent with the youngest population, Africa is on the brink of a demographic dividend – which is the acceleration of economic growth when the numbers of children and elderly people are much smaller than the number of working-age individuals. **In 50 years, there will be nearly 12 times more young people in Africa (1.4 billion) than young people in the entire European Union (121 million).**[14] With a skilled, empowered and educated workforce in place, this dividend could lead to rapid and sustained economic growth, creating markets and trading opportunities for the G7 and other countries. As Europe's population gets older, it will need workers – and Africa can supply them. What will vary dramatically is whether new arrivals are coming from stable countries, equipped with skills, or from fragile states and harbouring frustration.

A large youth population in itself is no guarantee of a demographic dividend. To make the most of these changes, decisive action that boosts education, employment and empowerment in Africa must be taken and taken now.

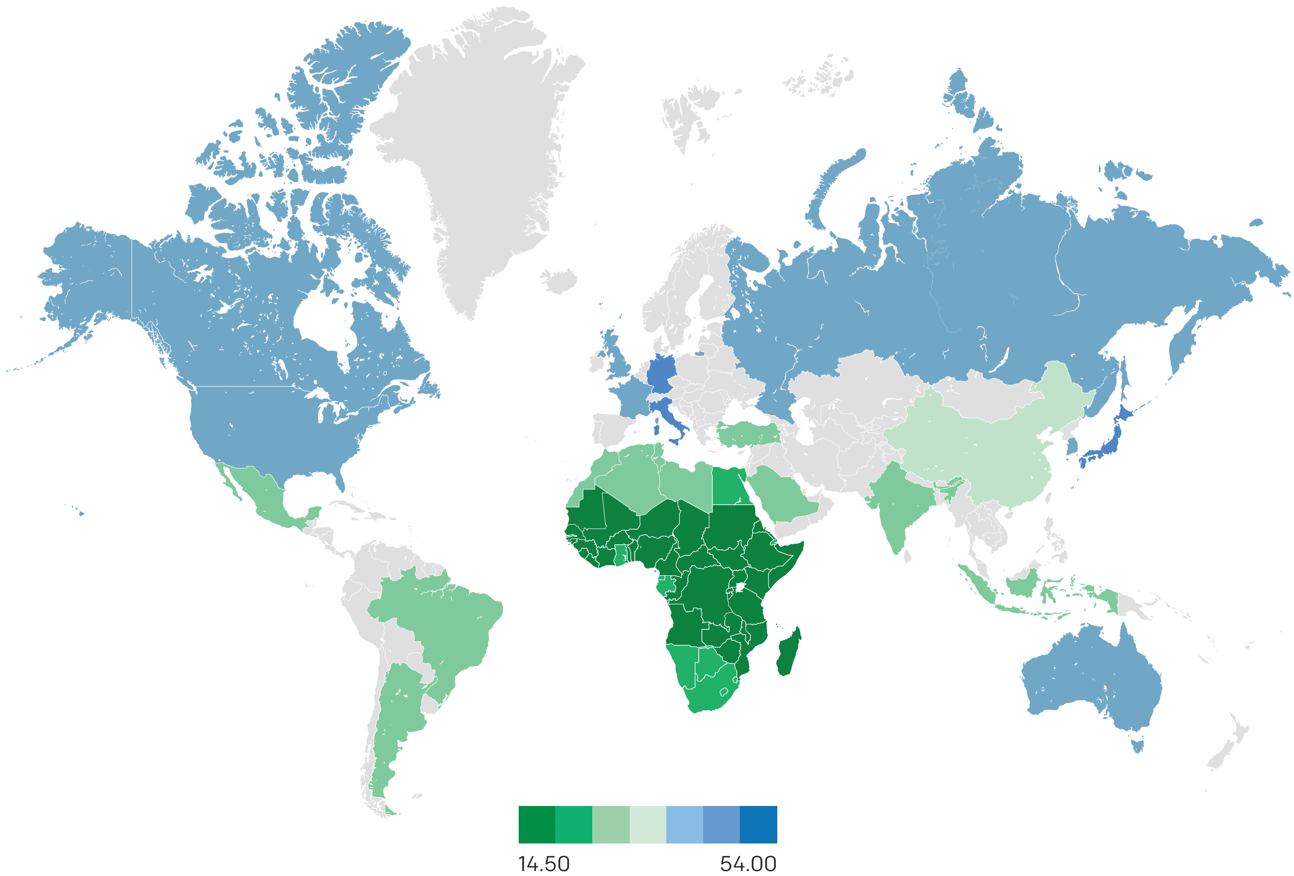
> ***"Africa cannot eat potential. To seize this potential requires a scaled global partnership, a modern-day Marshall plan, but led by Africa."***
>
> **Akinwumi Adesina,**
> President of the
> African Development Bank

Figure 1: Africa is getting more workers as Europe ages



Source: Total Dependency Ratio 1 from United Nations (2017). 'World Population Prospects, the 2017 Revision: Standard'. https://esa.un.org/unpd/wpp/Download/Standard/Population/; Population age 0-14, 15-64 and 65 and above from United Nations (2017). 'World Population Prospects, the 2017 Revision: Probabilistic Projections'. UN DESA Population Division. https://esa.un.org/unpd/wpp/Download/Probabilistic/Population/
ONE used the UN's Probabilistic Population Projections to calculate the dependency ratios for Europe and Africa from 2020-2100.

Figure 2: Africa is the world's youth hotspot: median age in each country (2015)



Source: Median Age of Population from United Nations (2017). 'World Population Prospects, the 2017 Revision: Standard'. https://esa.un.org/unpd/wpp/Download/Standard/Population/

How to harness the demographic dividend

If Africa is to make the most if this demographic opportunity, it will need a long-term strategy to drive inclusive and transformative economic and social development. This will require a new level of partnership between African, European and G7 leaders, who must jointly commit to an ambitious vision that mobilises the necessary investments and delivers structural transformation.

One key element to success will be a new partnership between the Africa Union and the European Union, which should hinge on reciprocal commitments to address shared priorities, such as human mobility, fairer trade, and fighting illicit financial flows on both sides of the Mediterranean, in addition to public investment in human development.

Broader multilateral cooperation should stimulate investment in education and health as well as policy reforms that promote women's empowerment, stimulate domestic and international investment, and promote improved revenue mobilisation.

Finally, it will be essential for African leaders to continue work towards the realisation of African-led initiatives that foster endogenous growth, such as the Common Free Trade Agreement and the African Union's Agenda 2063.[15] Coordinated efforts to boost regional trade, as well as strategies that enable markets to manufacture goods for national and regional markets as a primary foundation, in line with climate objectives, are essential for inclusive growth.

> *"Development without security is impossible, but security without development is unsustainable. If we get this wrong, fragile states become failed states, and their problems become our problems. But if we get this right… their success will be our success, too. Their stability will aid in our own."*
>
> **Bono**[16]

BLURRED LINES: LIONS, FRAGILE STATES AND LEAST DEVELOPED COUNTRIES (LDCs)

The McKinsey Global Institute think tank famously described Africa's fastest-growing economies as 'Lions' in its 2010 study, 'Lions on the Move', which made the case for the continent's investment potential.[17] A Lion can, however, also be a fragile state or a least developed country (LDC). Fragility can depend on many circumstances, but in general it refers to a country's heightened exposure to risk combined with a low capacity to mitigate or absorb such risk.[18] More than half of the world's fragile states are in Africa (38 out of the 58). LDCs meanwhile are nations with low levels of human assets and high vulnerability to economic and environmental shocks, and which face the most severe structural barriers to development.[19] Twenty-eight of Africa's 38 fragile states are also LDCs. Of fragile LDCs, however, Ethiopia, Côte d'Ivoire, Guinea, Burkina Faso, Rwanda and Tanzania were some of Africa's fastest-growing economies in 2017.

Why invest in fragile states and LDCs?

African countries differ dramatically in their growth potential, stability and development progress, and the picture is becoming increasingly complex as economic, political and environmental factors take effect. This means that a one-size-fits-all approach to investment, partnerships and aid will not work.

The so-called Lions, the continent's economic stars, generally attract the most external investment, but investing in other fragile states and LDCs is equally important. These are the countries where the last pockets of extreme poverty will be found and where Africa's population will grow the most. The average growth (from 2015-2035) in the working age population is 77% in fragile countries versus 60% in non-fragile ones.[20] Such countries will also continue to represent the primary sources of instability and will be contributors to human displacement.

What is currently happening in Uganda, Kenya and Ethiopia shows just how interconnected the Lions and the fragile states are. These three East African countries are among the region's economic success stories, but they also host the world's largest refugee camps. All three nations border South Sudan, which has been devastated by conflict, famine and economic collapse, forcing people to flee into neighbouring countries. The Bidi Bidi camp in Uganda has become one of the world's largest settlement camps and is now home to at least 270,000 refugees, pushing Uganda to breaking point.[21] Somalia is also a close neighbour. Without concerted action, the contagion of instability in these countries will threaten their stronger neighbours, who will have to deal with the economic and political consequences of failed development.

2. WHAT COULD DERAIL THE DIVIDEND?

Sub-Saharan Africa hosts more than 31% of the world's refugee population.[22]

While Africa has enjoyed a decade of sustained and significant economic growth, momentum has slowed and the economic picture is diverging, posing the risk of rising inequality. Decades of under-investment in health and education, combined with poor or corrupt governance, have created an environment of instability and risk that could jeopardise investment. This is particularly true in fragile states and LDCs, where investment is most urgently needed. African youth make up about 37% of the working-age population, but account for more than 60% of the continent's unemployed.[23] In many cases these young people, and particularly young women, have been failed by their education. For every girl out of school in Europe, there are 32 out-of-school girls in Africa.[24]

The Sahel - the belt of land between North Africa and sub-Saharan Africa – poses a significant threat to the stability of that region. The Sahel has been threatened by a changing climate for some years and nations are now also battling Islamist terror groups who have a stranglehold on the region.[25] Some of the continent's most advanced and growing states can be found in the region, but without intervention to tackle political instability, corruption and poor governance, the Sahel could destabilise the continent's long-term growth prospects. The conflict in Syria has had profound repercussions across the world, especially for Europe, and Syria is a fraction the size of Nigeria, for example. Over half of Syria's population was displaced by war.[26] Half of Nigeria's population would far outnumber the total population of the UK, Egypt or Turkey.

"The premiere strategic threat to global security, and our own, is not any single country, ideology, or weapon. It is human hunger, and unsatisfied demand for life-basics including food, energy, water, dignity, and a better future for masses living on the edge."

General James L. Jones,
former US National Security Adviser [27]

3. WHAT IS THE OPPORTUNITY?

Africa will have a larger workforce than India or China by 2034.[28]

> ***"The best way to help Africans today is to help them to stand on their own feet. And the best way to do that is by helping create jobs. [...] And I want to say that some of the best people to invest in on the continent are the women."***
>
> **Ngozi Okonjo-Iweala**,
> former Finance Minister of Nigeria [29]

This could – and should – be Africa's moment. As its population grows, so do the potential opportunities. With quality education, access to jobs and a transparent and accountable political system that empowers its citizens, Africa's new generation has the potential to drive global growth in the 21st century. When Africa prospers, we all prosper.

There are several factors that give reason for optimism. Technological advances, such as the increasing penetration of smartphones and micro-renewables such as micro-wind turbines, suggest that the continent might bypass the limitations of its infrastructure, and because many African countries are still in the early stages of digital adoption, the effect of these advances could be profound. The continent remains rich in a range of natural resources from agricultural land to metals, giving it a potential economic safety net.[30]

But the so-called fourth industrial revolution – one in which digital technologies could disrupt and destroy low-skilled jobs, particularly in the service sector – is a threat to this plan. Therefore education, lifelong learning and enabling young people to stay in rural areas by providing stable jobs, particularly in agriculture, could help to deliver food security, better nutrition and health and, ultimately, be a pathway out of poverty. Research shows that, in sub-Saharan Africa, growth in agriculture is 11 times more effective at reducing poverty than growth in other sectors.[31] Investing in the 6.1 million new health workers and 17.1 million new teachers that sub-Saharan Africa needs by 2030 would reap dividends in economic and social benefits.[32,33]

Almost half of all Africans are likely to be living in urban areas by 2030.[34] The rapid pace of urbanisation could lead to better jobs and higher productivity and incomes, but it could also increase inequality and strain resources and infrastructure to breaking point. Africa's business spending and household consumption is set to reach over $5.5 trillion by 2025, but this increased consumption must be met primarily by increased domestic production.

Currently Africa imports a third of its goods, but improving the manufacturing environment means that three-quarters of the potential demand could be met by African companies. As well as accelerating industrialisation, this would have the added benefit of creating up to 14 million new jobs over the next 10 years.[35] New jobs will not come only from manufacturing. Africa has many tech hubs,[36] such as Kenya's iHub, that are already creating companies and jobs in the new digital economy and, with improvements in digital literacy, it can create even more. If Africa's businesses and governments harness the full economic potential of the Internet, it could add $300 billion to the continent's GDP by 2025.[37]

The continent's cultural and creative industries are thriving. They are proving to be powerful empowerment tools for women and young Africans and are also valuable in crossing cultural and social boundaries between countries. The creative and cultural sector is a significant employer. By one estimate, in Africa and the Middle East this sector generates $58 billion in revenues and employs around 2.4 million people.[38]

A young, educated and skilled workforce could drive accelerated growth in Africa, but it could also address a growing threat in Europe where the working-age population is moving in the opposite direction. To maintain the strength of its workforce, it is estimated that Europe will need to bring in 100 million migrants between 2010 and 2050, 2.5 million every year.[39] One estimate suggests that because Germany's population is both shrinking and ageing, its companies will be short of 1.8 million skilled workers by 2020, and 3.9 million by 2040.[40] Skilled migrants, including those coming from Africa, could help to fill that gap.

Success stories in fragile settings

The following success stories illustrate vividly how investment in fragile states and Lions can yield significant returns - and how the the distinction between these categories is not always clear. Rwanda, is often classed as a Lion but, because of the threat of conflict and poor development indicators, Rwanda is also a fragile state (FS). Nevertheless, Rwanda and countries like it show what can happen when government action and targeted investment in education, employment and empowerment combine to meet urgent needs.[41]

ETHIOPIA - Ensuring sustainable food security[42]

LDC FS

Ethiopia launched its Productive Safety Net Programme (PSNP) in 2005 to improve the incomes of rural, chronically food-insecure households. The programme helps such households to become self-sufficient food producers and provides predictable, multi-annual transfers, in both food and cash, to encourage greater economic resilience. Since its launch, it has helped nearly eight million people gain sustainable assets and food security.[43] Programme participants are more likely to use the health system and send their children to school.[44] The programme also funds 45,000 public works projects each year that focus on soil and water conservation, tree planting and grazing control, and these have contributed to climate change mitigation, including through reducing soil loss and the sequestration of large quantities of carbon dioxide.[45]

RWANDA - Creating a digital generation

LDC FS

The Rwandan government sees the Internet and digital technology as the passport to prosperity. Some 75% of Africans are not yet online, but the country has set an ambitious target of doubling Internet penetration by 2020. This will mean bringing five million new users online, but also aims to help people develop new digital jobs and expand digital literacy, particularly in rural areas, all of which will be essential if Rwanda's young population is to capitalise on the new opportunities open to a digitally trained workforce. The initiative will create 5,000 digital ambassadors, half of whom, it is hoped, will be female, who will teach digital literacy skills, and at least five million people will be trained through e-business and e-government services.[46]

NIGERIA - Tracking corruption and accountability through connected communities

FS

Connected Development (CODE) is an NGO launched in 2012 to improve access to information and empower marginalised communities. CODE uses smartphone technology to connect, organise and mobilise communities. It runs programmes such as Follow the Money, which tracks and monitors the disbursement of government and aid funding, and has become the largest volunteer grassroots movement on transparency and accountability in Africa. Since its launch, it has traced millions of dollars of aid that had been illicitly diverted from health and education programmes. It also tracks environmental crises, the delivery of government services and proposed education plans against actual local needs.[47]

CÔTE D'IVOIRE - Défi-Jeunes Education, Training and Integration Programme

FS

Years of internal conflict had decimated Côte d'Ivoire's schools, leaving its young people without the necessary skills and education to find jobs. To tackle this crisis, the government launched Défi-Jeunes, the first education project of its scale in an African country. By promoting access for rural children, constructing new schools through local businesses and creating specialised training centres, the programme aims to create 20,000 new places in 116 primary schools and 92,000 places in 240 secondary schools, and assist 48,000 young people in finding employment or developing entrepreneurial skills.[48]

4. WHAT NEEDS TO HAPPEN?

We are at a crossroads. Global and local inaction could lead us down the road of dangerous instability. However, the generation that is Africa's best hope is already being born. With the right investment, partnerships, policies and leaders, they could help eradicate poverty and conflict forever. If that happens, the future will be Africa's, and the benefits will extend far beyond the continent. The success of Europe, in particular, will depend on whether Europe and Africa will be able to build a new type of partnership built on three essential pillars.

EDUCATION

If Africa's new generation is not equipped for employment and empowerment through adequate relevant education, then the continent will miss a great opportunity. Every child deserves a good education but there are currently 130 million girls out of school worldwide, with 52 million (34%) living in Africa.[49] Educated girls are more empowered and independent when they are healthier, and investments targeting girls also improve development outcomes for their families and communities. The impact of addressing the gender gap in education could yield between $112 billion and $152 billion a year for developing countries.[50]

EMPLOYMENT

Africa needs 22.5 million new jobs a year for the foreseeable future to absorb the youth boom as these young people enter the workforce. Women also face more barriers to employment than men, and young women will need specific support to enter employment. Increasing the quality and quantity of jobs in Africa will depend on sustainably boosting productivity in key sectors such as agriculture, specifically by producing and exporting higher-value, processed goods, and effectively boosting incomes across more efficient value-chains in a climate sensitive way. In the wake of slower GDP growth, commodity volatility, and the rise of artificial intelligence, sustained employment will increasingly depend on competitive and creative workforces that maximize all potential capital through targeted investments in gender equity and human development.

EMPOWERMENT

Africa's youth must be empowered – both through opening up political space and by engaging young people in political and civic processes, transforming the way that African countries are governed. This is particularly important in fragile states or poorly governed countries, which are likely to account for the bulk of the emerging population boom. Digital tools are already playing a key role in building inclusive and autonomous communities. Investment in health and nutrition is also critical to providing the baseline that young people need to reach their full potential.

ENDNOTES

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ONE calculated the average five- year population growth rate for the working-age population (ages 15–64) for Africa and Germany using UN World Population Prospects Data. It then applied this growth rate to 2016 ILO figures to project the figures for German employment and African unemployment.

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ONE calculated the average five-year population growth rate for the working-age population (ages 15–64) for Africa and Europe using UN World Population Prospects Data. It then applied this growth rate to 2016 ILO figures to project European employment and African unemployment.

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