



NATIONAL INTELLIGENCE COUNCIL

MEMORANDUM

25 February 2021

NICM 2021-02209

(U/[REDACTED]) Africa: Economic Growth Challenged by Pandemic and Insecurity

(U) Key Takeaway

(U/[REDACTED]) Africa's long-term upward economic trajectory faces pressure from the COVID-19 pandemic and an increase in violence. Africa's population will account for about 20 percent of the world population by 2030, and the continent has experienced a sharper increase in migration than any other region in the world. Urbanization and economic integration efforts—such as the African Continental Free Trade Area (AfCFTA)—will make Africa's expanding market more accessible to African countries and external partners, although longstanding development and security challenges probably will continue to hamper global investment.

- (U/[REDACTED]) The continent is now experiencing its first recession in 25 years, representing a departure from a positive economic outlook for many countries before the pandemic. COVID-19-related travel restrictions and lost tourism revenues, decreases in remittances, and uncertainty in tariffs and exchange rates are straining many governments' ability to meet popular demands. The COVID-19 pandemic could erase at least five years of progress in fighting poverty, according to the World Bank.
- (U/[REDACTED]) In addition to pandemic-related economic setbacks, many African countries continue to face persistent domestic and transnational security threats that undermine development goals and are spurring increased migration. Violent incidents have increased during the past decade, and extremist activity has grown and spread across the continent, according to a review of a publicly available dataset. North Africa is the only region that has seen a decline in extremist activity, mainly since 2015.
- (U/[REDACTED]) Personalist autocracies and democracies are the most common governance types of the past decade, with six fewer democracies in 2020 from an all-time high in 2015, despite rising public calls for improved government accountability and responsiveness. The more than 20 new heads of state in Africa since 2017 and 13 elections slated for 2021 provide an opening to forge close ties with a new set of African leaders.

(U) This memorandum was prepared under the auspices of the National Intelligence Officer (NIO) for Africa. It was drafted by the National Intelligence Council [REDACTED]. Questions may be directed to the NIO on secure [REDACTED]

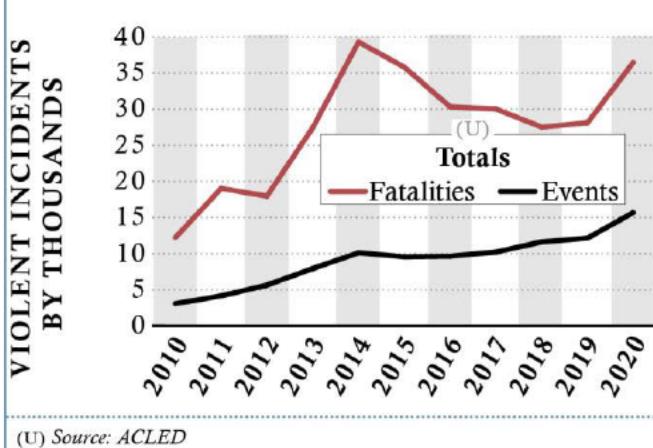
(U) SECURITY

(U) These charts and maps are U//

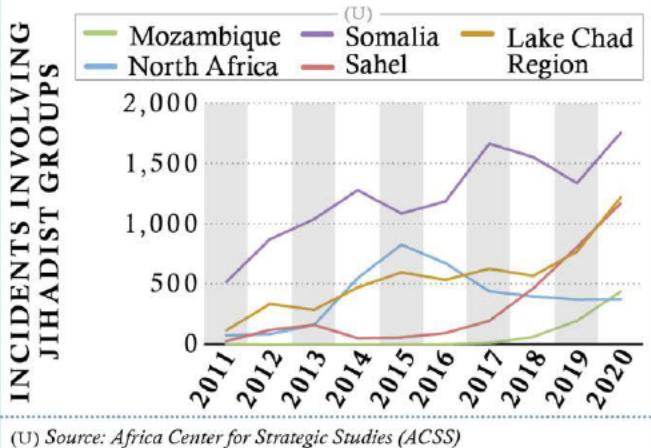
(U) Violence has increased on the continent during the previous decade, killing almost 300,000. While growing media penetration accounts for some of the reported

increase, the data show a clear upward trend, resulting in four times as many reported violent incidents by the end of the decade.

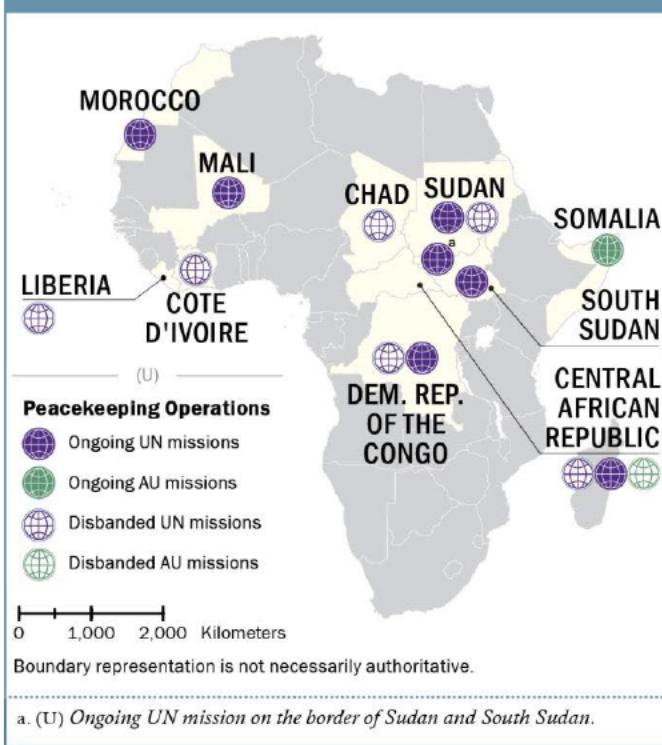
Violent Incidents and Fatalities, 2010–20



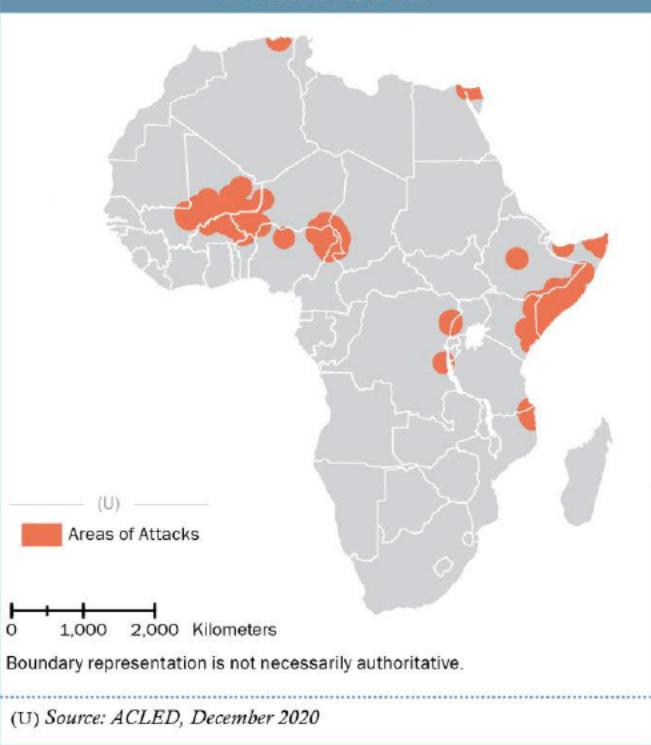
Jihadist Groups' Incidents by Region, 2011–20



Peacekeeping Missions in Africa, 2010–20



Jihadist Groups' Attack Locations, December 2020

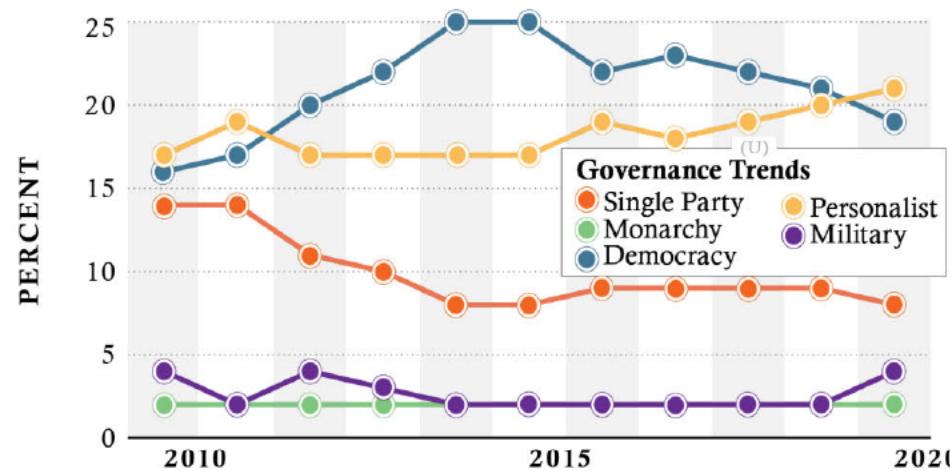


(U) GOVERNANCE

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Governance Trends in Africa, 2010–20

(U) Authoritarian governments remain the overwhelming majority of regime type in Africa—more than 80 percent in 2020—and the share has declined since the high water mark of 25 percent in 2015. Among authoritarian governments, personalist regimes—in which power is concentrated in a single person or small group—are the most common form. Without intervention, the region may follow the global trend of growing autocracy; the pandemic has provided many administrations a pretext to enact security measures and implement regulations that could accelerate this trend.



(U) Source: Rulers, Elections, and Irregular Governance (REIGN)

Protest Trends in Africa, 2010–20

(U) Protests are on the rise in Africa. Ten times more protests occurred in 2020 than in 2010 on the continent, according to one respected dataset cataloging protests in Africa. There is a long history of street protests in Africa driven by deep-seated frustration with the political and economic status quo. Growing access to technology is facilitating political activism and engagement.

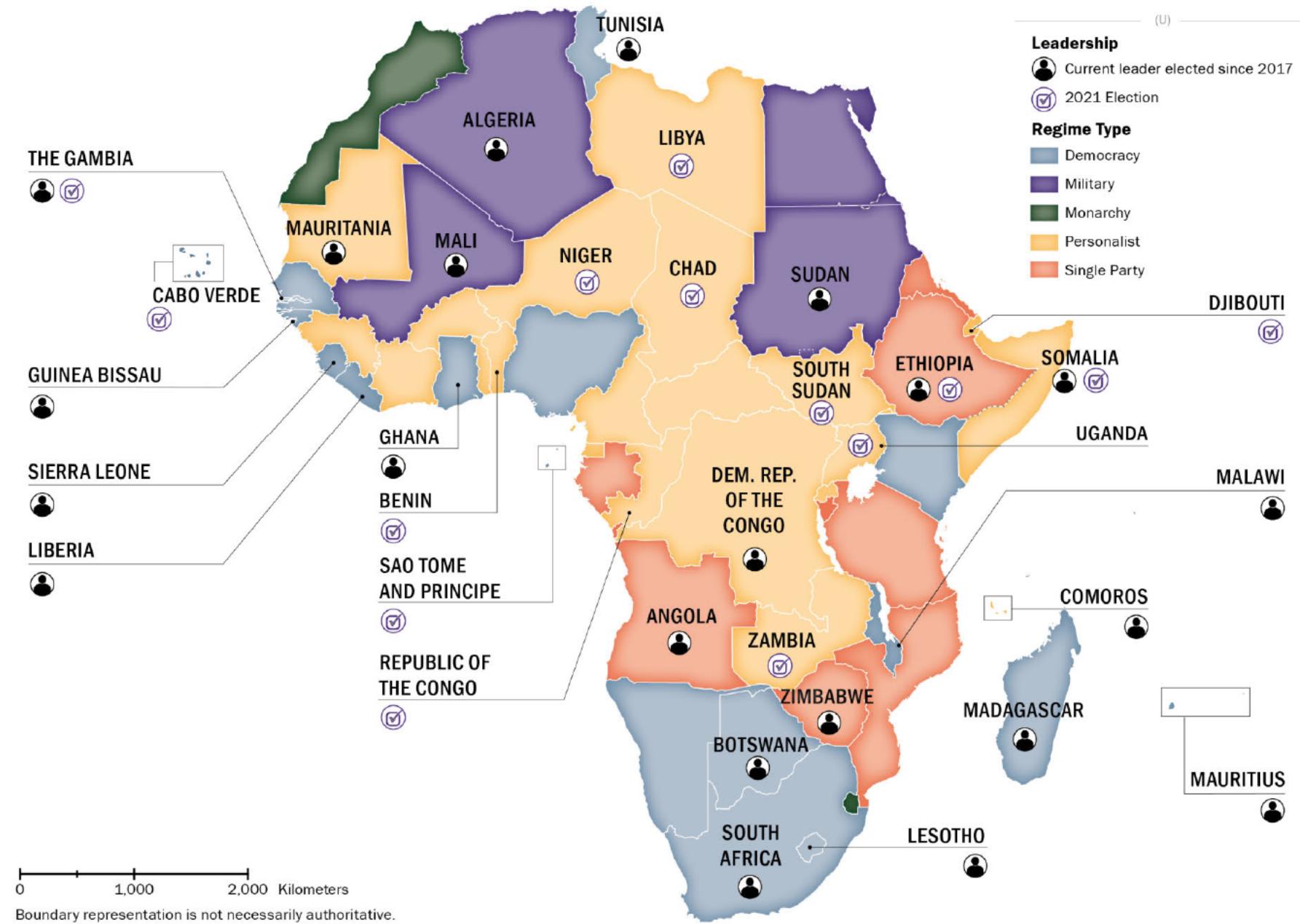


(U) Source: ACLED

New Leaders in Africa, 2017–20

(U) Since 2017, more than 20 new Africa leaders have assumed office, coming to power through the more than 60 elections and over 15 other transitions of power, including a coup in Mali and revolutions in Algeria and Sudan. There are fewer

democracies in 2020 compared with those of 2015; currently 13 elections for heads of state are scheduled for 2021.

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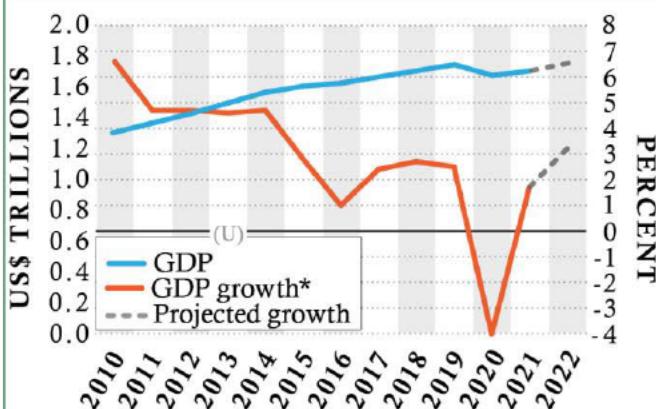
(U) ECONOMY

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(U) Before the pandemic, Africa's economic outlook was trending positively for many countries; some of the world's fastest-growing economies were on the continent. There was also forward momentum toward regional integration with the middle class expected

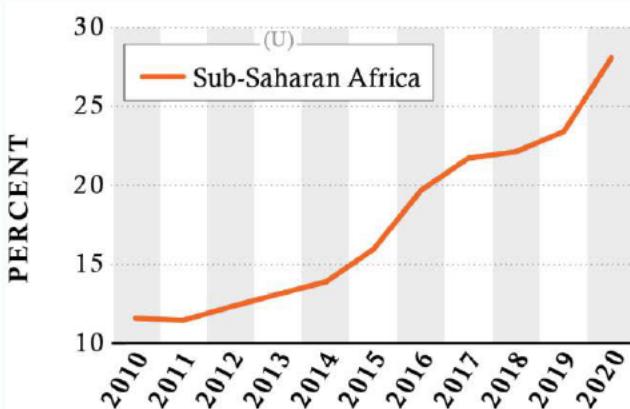
to grow about 66 percent by 2030. However, global coronavirus containment efforts devastated economies across the continent and in 2020, Sub-Saharan Africa's economy entered its first recession in more than 25 years.

GDP Trends for Sub-Saharan Africa, 2010–20



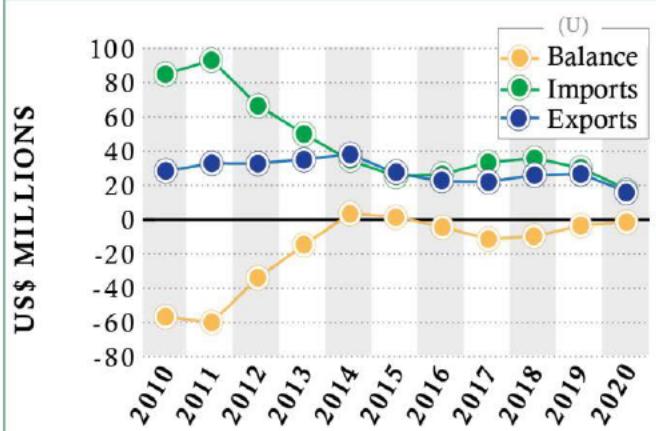
* (U) Real US dollars at 2010 prices. Source: Economist Intelligence Unit, 2021

Debt as a Percentage of GDP for Sub-Saharan Africa, 2010–20



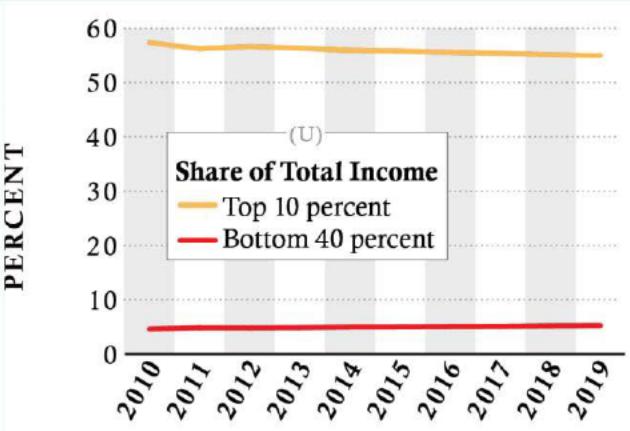
(U) Source: International Monetary Fund, 2020

US Trade in Goods with Africa, 2010–20



(U) Source: US Census Bureau, 2020

Income Inequality in Africa, 2010–19



(U) Source: World Inequality Database, 2020

African Continental Free Trade Area (AfCFTA)



Wamkele Mene
Secretary-General
since 19 March 2020

(U) The AfCFTA came into effect in January with headquarters located in Accra, Ghana. It is expected to promote free trade, industrialization, diversification, and movement of the continent's 1.3 billion people into a multi-trillion dollar economic bloc. Thirty-five countries have ratified the agreement as of January. The World Bank estimates the pact could add \$76 billion to the rest of the world by 2035.

(U) PEOPLE

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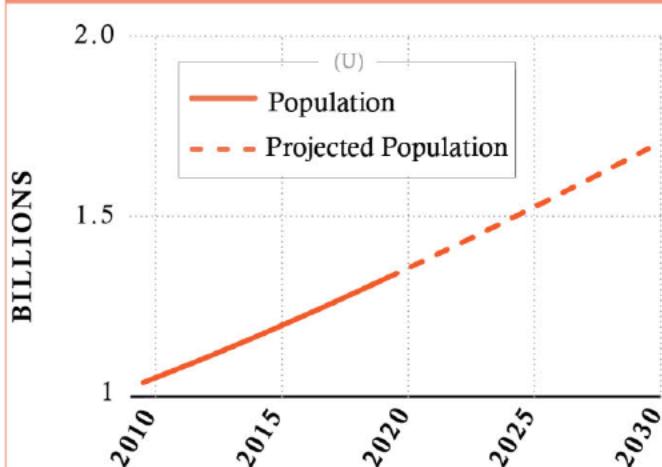
Population Growth and Urbanization

(U) Africa's current population of 1.3 billion people is projected to reach almost 1.7 billion by 2030, which will represent about 20 percent of the world's population. Africa also has the largest concentration of young people in the world; in 2020, the median age in Sub-Saharan Africa was 19 years old compared with the

global average of 31 years old.

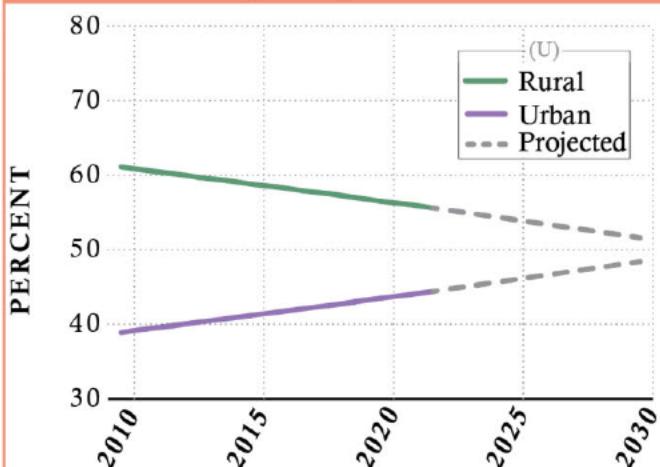
(U) Although the majority of Africans live in rural areas, more than 80 percent of Africa's population growth during the next few decades will occur in cities, making it the fastest urbanizing region in the world.

Africa's Population Projection, 2010–30



(U) Source: United Nations, World Population Prospects, 2019.

Africa's Rural-Urban Population Projection, 2010–30



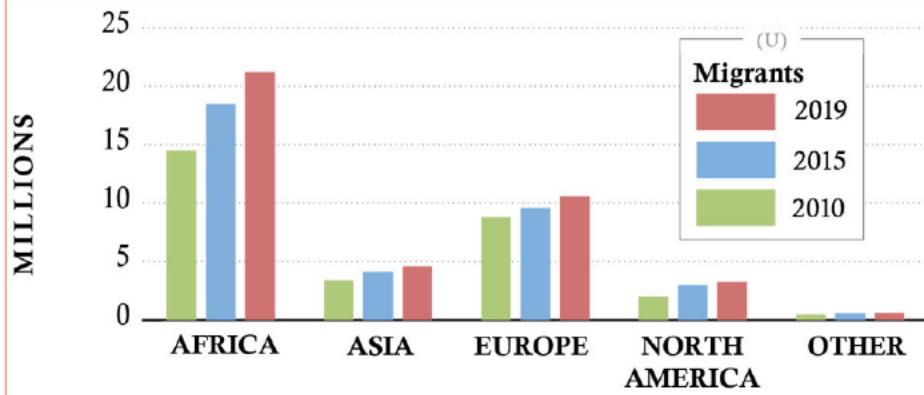
(U) Source: United Nations, World Urbanization Prospects, 2018.

Migration

(U) Internal and external African migration, is taking place at a higher rate than any other region in the world. Between 2000 and 2019, the number of

international migrants in Africa increased from 15.1 million to 26.5 million, the sharpest relative increase (76 percent) among all major regions of the world.

African Migrants By Destination



(U) Source: United Nations, International Migrant Stock, 2019.

- The percentage of African migrants to Europe has been stable for more than a decade, and the number of arrivals through the Mediterranean has dropped since 2015.
- One in four international migrants in Africa is a refugee, compared with one in ten globally.
- 79 percent of all international migrants residing in Africa were born in Africa.

(U) PEOPLE

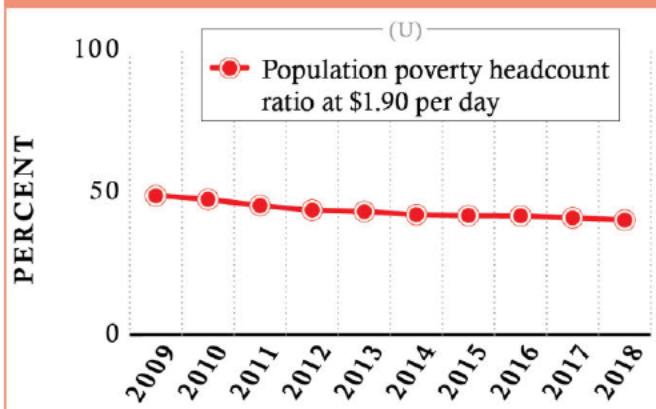
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Development in Sub-Saharan Africa

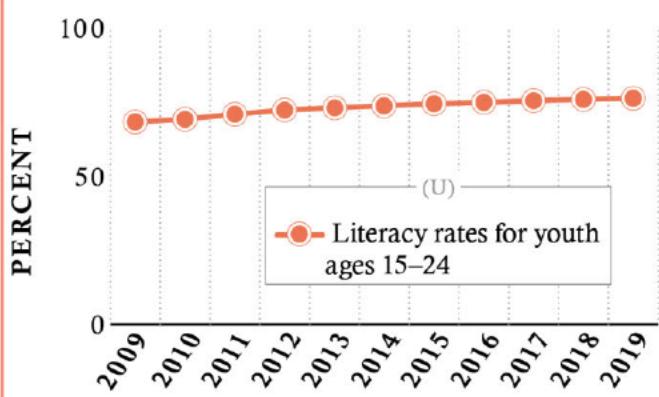
(U) Although Sub-Saharan Africa has made strides on some development indicators during the past decade, food security has declined since 2014, and the COVID-19 pandemic could erase at least five years

of progress in fighting poverty. In addition, climate change will push 43 million more people in Africa below the poverty line by 2030.

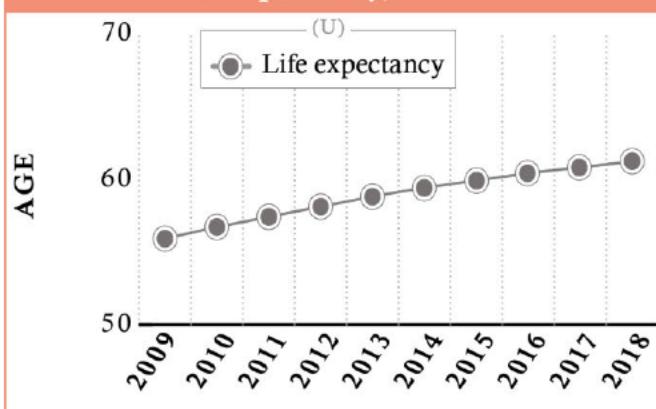
Poverty, 2009–19



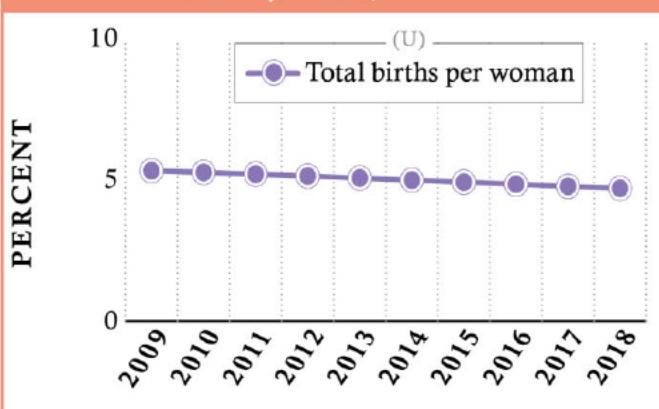
Literacy Rate of Peoples from Ages 15–24, 2009–19



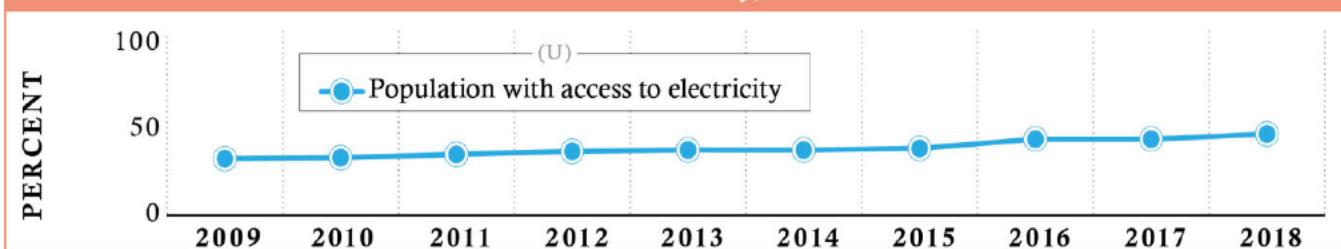
Life Expectancy, 2009–18



Fertility Rates, 2009–18



Access to Electricity, 2009–18



(U) Source: World Bank