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Africa and EU-Africa partnership insights: INPUT FOR ESTONIA'S NEW AFRICA STRATEGY

By Nadia Ashraf and Jeske van Seters

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The Ministry of Foreign Affairs of Estonia envisages to develop an Africa strategy to steer Estonia's development cooperation with the continent. While Estonia currently has limited presence in Africa, it is opportune timing for the country to step up its engagement, given that African countries are undergoing major transformations and the continent has recently received greater prominence in the EU agenda. This report provides input to inform Estonia's Africa strategy in particular to guide the focus, scope and structure.

The report gives an overview of the current and future economic, social and political landscape of the African continent to highlight major opportunities and challenges for sustainable development. It also presents information on development cooperation activities of EU institutions, member states and other main donors in Africa. The focus is particularly on sectors of interest to Estonia: agro-industries, forest industries, ICT and renewable energy.

Based on this analysis and a review of Africa strategies and approaches of a select number of EU member states, the report then presents key criteria to guide the geographical and sectoral focus of Estonia's Africa strategy. This includes a consideration of the development needs of African countries, as well as Estonia's national interests, comparative advantages and diplomatic presence in African countries. Division of labour, in terms of coordination and cooperation with other development partners active in the countries and sectors of interest, is also a key consideration for guiding Estonia's Africa strategy.

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Acronyms

AfCFTA	African Continental Free Trade Area
AfDB	African Development Bank
AMISOM	African Union Mission to Somalia
AU	African Union
AUC	African Union Commission
CAR	Central African Republic
CRS	Credit Reporting System
CSO	Civil society organisation
DAC	The OECD Development Assistance Committee
DFID	UK Department for International Development
DRC	Democratic Republic of Congo
EC	European Commission
ECDPM	European Centre for Development Policy Management
EU	European Union
FDI	Foreign direct investment
GDP	Gross domestic product
ICT	Information and Communication Technology
IOM	International Organisation for Migration
ISS	Institute for Security Studies
LDC	Least developed country
MFA	Ministry of Foreign Affairs
NGO	Non-governmental organisation
ODA	Official Development Assistance
OECD DAC	Development Assistance Committee of the Organisation for Economic Cooperation and Development
UN	United Nations
UNCTAD	United Nations Conference on Trade and Development
UNECA	United Nations Economic Commission for Africa
US	United States
USD	United States Dollar

1. Introduction

The Ministry of Foreign Affairs of Estonia leads the development of an Africa strategy to guide Estonia's future development cooperation with (countries on) the continent. At present, Estonia has a limited involvement in Africa.

This paper aims to support Estonia in this initiative by providing input to such a strategy. In particular, it attempts to provide some elements of consideration that may guide the focus, scope and structure of Estonia's new Africa strategy. It does not, however, aim to put forward a ready-made strategy. This is up to the Estonian government, in consultation with others like Estonian civil society organisations (CSOs) and private sector representatives, as it involves political choices. ECDPM, as a facilitating actor, can only guide Estonia's thinking regarding the strategy.

Information for this paper has been collected through desk review of relevant research reports and papers, the OECD Development Assistance Committee (DAC) database, as well as Africa (and broader development cooperation) strategies of EU member states. The paper begins with a brief overview of key trends in Africa and EU-Africa relations to provide some indication of the current and future economic, social and political landscape of the African continent. The following section presents information on development cooperation activities of EU institutions, member states and other main donors in Africa. The focus is on a select number of subsectors, as requested by the Estonian Ministry of Foreign Affairs. The final section presents some key takeaways from Africa (and broader development cooperation) strategies of a select number of EU member states, which may inform the contours of Estonia's Africa strategy.

2. Key trends in Africa and Africa-EU relations

Economic growth in Africa is positive, albeit slowing down. Growth rates vary considerably across regions and countries, and seem to be volatile.

The African continent experienced strong growth between 2000 and 2016 (4.6% per annum), which contributed to a "rising Africa" narrative (AUC/OECD, 2018). Since then growth has slowed down slightly, (3.4% in 2017 to 3.2% in 2018) but is expected to bounce back between 2018 and 2020 (UNECA, 2019). Recent economic growth in Africa was driven by high commodity prices, higher oil production and favourable weather, in addition to investment in public infrastructure and improved macroeconomic management. The growing African economy has also contributed to a shift in EU-Africa relations moving away from a donor-based model towards long-term cooperation on jointly identified, mutual and complementary interests. The new Africa- Europe Alliance focuses on unlocking private investment and exploring the huge opportunities that can yield benefits for African and European economies alike.

It is important to note that growth in Africa is heterogeneous and varies significantly across the continent. In 2018 East Africa remains the fastest growing economy, with West Africa expanding (since 2017), while Central, North and Southern Africa's economies grew at a slower pace (AUC/OECD, 2018). Moreover, for many economies in Africa, growth is volatile and subject to external commodity shocks or severe climate fluctuation. This is attributed to the fact that many countries remain highly dependent on rain-fed agriculture and commodity exports, and thus often struggle to sustain growth over a long period of time.

Growth and productivity of the manufacturing sector is critical to scale up Africa's economies and sustainably lift countries out of poverty.

Considering a sectoral distribution of growth, agriculture accounts for about 25% of Gross Domestic Product (GDP) in Africa on average – with wide variations across countries (AfDB, 2019). Services account for over half of GDP. And while manufacturing currently makes up a small proportion of total GDP and has been on a declining trend, it is considered critical to absorb the growing supply of youth and working population in Africa. At present, the manufacturing sector in Africa lacks the dynamism to provide adequate economic opportunities for these potential workers. This may be attributed to a lack of enabling environment, access to finance and energy, and corruption; the result of which is low productivity and hampered global competitiveness of the sector.

African countries have employed different models to stimulate growth of the manufacturing sector. Some governments rely on Special Economic Zones to promote industries by offering key support in terms of access to infrastructure and favorable tax rates. Others focus specifically on small producers to drive growth in the economy and create employment opportunities. Technology, especially digital tools, can also play a crucial role in enabling businesses to access more efficient systems of production. The main question here is whether technology can be harnessed to raise productivity, without substituting a large number of workers.

Recent economic growth in Africa has not substantially contributed to poverty eradication, or reduction in income inequality.

While the overall trend in economic growth in Africa is positive, a closer look at its impact on well-being and poverty reduction creates a more nuanced picture. Recent growth has in fact not translated in commensurately higher standards of living, and is currently insufficient to eradicate poverty. Africa's progress in poverty reduction is slow and has not kept up with the increase in population. So while the poverty rate has declined (from 54.3% in 1990 to 36% in 2016), the total number of people in absolute poverty has remained around 390 million (UNECA, 2019). Further alleviating poverty also requires a reduction in income inequality, with a focus on reducing extreme poverty. Between 2009-16, 36% of the African population lived on USD 1.90 a day or less (UNECA, 2019). To fight poverty, growth in Africa needs to be more inclusive.

Rapid urbanisation and growing middle class in Africa will continue to create opportunities. However this may worsen existing levels of inequality, and would require appropriate policies and investment to yield greater benefits.

Africa is the second fastest urbanising region after Asia. Currently at 43%, the proportion of Africans living in urban areas will rise to 50% by 2035 (AUC/OECD, 2018). This is closely associated with the growing middle class in Africa, which at present constitutes 330 million people, nearly a third of the continent's population (CFAO, 2015). These demographic changes are underpinning the growth in private consumption and the expansion of domestic markets. For instance, the urban sector constitutes 60% of the food market in Africa (AUC/OECD, 2018). Foreign Direct Investment (FDI) to tap Africa's urban markets is also on the rise.

Having said that, the urban transition in Africa also comes with its challenges and downsides. For one, rapid urbanisation may exacerbate inequalities by concentrating consumption and investment in small pockets of growth. It is estimated that by 2025, consumption in Africa will be concentrated in a pool of 75

cities across Africa, creating “pillars of growth” surrounded by “pools of poverty” (ISS, 2017). Moreover, urban centers cannot simply be associated with prosperity either. Majority of the employment generated through growing urbanisation is limited to informal or low value-added sectors. In addition, Africa is experiencing high rates of urban poverty, with 62% of residents living in informal settlements (AUC/OECD 2018). Therefore, to reap the benefits of urbanisation, it is necessary to tackle these challenges through more holistic support from governments and development partners.

The potential of Africa’s rapid demographic growth to create “demographic dividends” will depend on investment and employment generation.

Africa has the world’s most youthful and fastest growing population. From 2000 to 2015, the population has grown from 814 million to nearly 1.2 billion, with over 40% of Africans under the age of 15 (ISS, 2017). Due to rapid population growth, Africa also hosts the world’s second largest workforce. These demographic changes present a window of opportunity or a “demographic dividend” in terms of greater economic growth driven by expanding labour force and domestic demand. It could potentially contribute 10-15% of the GDP growth by 2030 (AUC/OECD, 2018).

However, the positive impact of labour supply on growth will only materialise if enough jobs are created. Unfortunately, current GDP growth has not generated sufficient employment and quality jobs remain scarce. Vulnerable and informal employment remain a critical challenge in Africa, which is exemplified by the fact that almost 42% of working youth live on less than USD 1.9 a day (AUC/OECD, 2018). Closely related is the issue of skills mismatch. While the number of low-skilled workers continues to grow in Africa, it is predicted that in the coming decade profitability will be concentrated in sectors that do not employ many low-skilled workers. So while manufacturing will be crucial for creating jobs, governments will need to further their efforts in improving the quality of education systems, while also broadening the benefits of industrial/technological growth. From a development partner perspective, the EU places strong emphasis on supporting African countries to reach their economic potential through interventions that prioritise sustainable investment and jobs. Various Jobs and Growth Compacts are currently under discussion with African countries in order to steer the joint efforts around value chains with the highest potential for job creation (European Commission, 2018).

Investing in digital skills and appropriate infrastructure can potentially offer new opportunities for Africa in the digital era.

Digital technologies and the services they support are enablers of sustainable development and inclusive growth. Africa is experiencing an unprecedented growth of digital technologies, with over 400 million mobile internet users and numerous opportunities for innovation. Digitalisation can provide African manufacturers access to new modes of production, while bringing service providers closer to local and global consumers. Countries such as Ghana and Kenya have shown the potential of leapfrogging in technology by embracing the accelerating technological growth. Digital tools can also allow African governments to deliver basic services more efficiently and transparently. For instance, electronic payment methods such as M-pesa and Fintech are considered innovative services, especially given that 50% of Africans will own smartphones by 2020 (ISS, 2017).

Seizing the opportunities provided by the digital revolution will depend on whether African countries can sufficiently support systems and users. Governments need to support businesses and people with appropriate skills to integrate in the digital era, along with creating strong and enabling (regulatory and physical) infrastructure. In this regard, the Africa-EU digital economy taskforce has recently adopted a

report outlining a set of agreed principles and policy recommendations to promote Africa's digital economy (AUC/EC, 2019). The focus is on four main objectives including universal access to affordable broadband, guaranteeing essential skills for all, improving the business environment and facilitating access to finance and business support services, and accelerating the adoption of e-services.

Though climate change presents many challenges for vulnerable African countries, green growth strategies can help mitigate risks and steer innovation.

It is estimated that 27 out of 33 countries most at risk of climate change in the world are in Africa (AUC/OECD, 2018). Shifts in temperatures, changing rainfall patterns, desertification and frequently occurring extreme weather events are some of the major risks facing the continent. Such environmental and climatic hazards create stresses in terms of food security, water scarcity and resource management, as well as putting a strain on the capacity of the state. Agriculture, in particular, remains vulnerable to climate fluctuations. This is evidenced by the recent droughts in Eastern and Southern Africa and their negative impacts on the agricultural sector.

“Green growth” strategies can enable Africa to tackle some of these challenges and save on future adaptation costs. In particular, African countries can tap the potential of renewable energy, especially considering its fast decreasing cost. Given the rapid population growth in Africa, renewable energy presents a huge potential to address energy shortages in the continent. It is predicted that by 2040 more than 25% of total energy generated in Africa would come from renewable sources—geothermal, hydro, solar, and wind (Castellano et al, 2015). This transition towards greener growth needs to be supported by appropriate government policies. For instance, the Joint EU-AU Research and Innovation Partnership on Renewable Energy supports the transformative path toward sustainable, affordable and accessible energy in both continents through promotion of joint research and innovation efforts in renewable energy and energy efficiency.

Progress in regional economic integration remains highly uneven, but there is significant enthusiasm with the signing of the AfCFTA.

Intra-regional trade in Africa is among the lowest in the world. In 2016 intra-Africa exports stood at 18%, compared to 59% in Asia and 69% in Europe (Sow, 2018). Large infrastructure deficit remains a major challenge for intra-Africa trade, and while the overall cost of trade has declined, it has happened more slowly compared to other regions (AfDB, 2019).

This is regardless of the fact that Africa is home to numerous regional organisations focusing on promoting economic cooperation, as well as several other aspects for cooperation including peace and security, and governance. Progress in the different areas is varied across the regional organisations, in terms of policy frameworks *and* implementation, depending on the environment faced by member countries, and priorities of the blocs.

The establishment of the African Continental Free Trade Area (AfCFTA) is expected to significantly boost intra-regional trade. This is important for several reasons. Intra-African trade tends to be more sophisticated, with a greater share of manufactures, as compared to Africa's trade with other regions (which tend to be concentrated in commodities) (Brenton and Soprano, 2018). There is also more opportunity for skills-transfer and value addition in this case. Moreover, over 40% of the African population depends on cross-border informal trade. Simplifying the trade regime between African countries can help bring this large market into the formal sector and scale it up.

While there is some progress towards greater democracy in Africa, essential elements of democratic accountability are often absent, with significant variations across the continent.

Over the past three decades, there have been some positive democratic developments in Africa. Nearly all African states now hold multiparty elections for transition of power, and there is a clear increase in the number of elections that are deemed fair (Bakken and Rustad, 2018). There has also been a significant decline in the number of military coups; while 142 coups occurred between 1950 and 2000, only 33 took place between 2000 and 2015 (ISS, 2017). However, a deeper analysis of democracy and governance in Africa reveals a mixed picture. Despite democratic transitions becoming the norm in African countries, there is an overall decline in the quality of political participation, rule of law and the capacity of the state in a number of areas (Cheeseman, 2018). Freedom House currently categorises 44% of African countries as “not free”, and 45% as “partly free” (Bello-Schünemann et al, 2018). It appears that elements of democracy and authoritarianism seem to coexist and there is a large variation in the quality of democracy across the continent. West and Southern Africa continue to perform better than the other regions, and while many authoritarian governments are becoming even more repressive, a number of aspiring democracies are holding their ground.

Another key trend relates to the shrinking space for civil society in Africa, which mirrors a global phenomenon. Since the early 2000s, a growing number of governments in Africa have been cracking down on civil society organisations (Smidt, 2018). Not only are governments intimidating and arresting activists and journalists that criticise their work, they are also adopting restrictive policies to constrain civil society’s operating space. Such practices hinder long-term progress towards democracy and inclusive development. In this regard, the EU considers the civil society as a key partner in development, and is working to strengthen the role of CSOs with a view to improve local ownership of development processes. Roadmaps that aim to develop a more structured dialogue with society have been created for partner countries, including in Africa (European Commission, 2018).

Conflict in Africa is causing fewer fatalities, but is more complex than before. Religious extremism is a key vector of violent conflict in Africa.

Levels of high fatality violence and wars in Africa are much lower than during the 1990s. Armed conflicts are currently concentrated in four regions including North Africa and the Sahel, West Africa, the Horn, and the Great Lakes region, with the highest number of politically violent events occurring in Somalia, Nigeria, Egypt, South Africa, Sudan and Democratic Republic of Congo (DRC) (ISS, 2017). However, while high fatality violence is on decline, Africa is experiencing an increasing number of violent incidents caused by riots and protests. In 2016, 40% of total conflict events in Africa were driven by riots and protests (ISS, 2018).

Moreover, conflict in Africa is more complex than ever before, not least due to the continued existence of cross-border and inter-state forces at play. This may entail cross-border military operations, proxy support to rebel groups and spilling over of religious extremism. Radical Islam, in particular, is posing significant threats to peace and security on the African continent. Islamic terrorism has emerged in Mali, Kenya, Nigeria and Central African Republic (CAR), and in all four countries the threat had in fact spilled over from failing neighbouring states where militants were able to strengthen their capacity (Collier, 2015).

Power struggles over natural resource discoveries is another important contributor to conflict in Africa.

In the past decade, many valuable resources have been discovered in Africa, which on the one hand have the potential to drive development, but on the other can also catalyse violent conflict. For instance, diamonds in Angola and Sierra Leone have been used to finance rebel groups. Similarly, armed groups have exploited the so-called “conflict minerals” in DRC to fund a brutal war which has displaced nearly 2.7 million people (Global Witness, 2015). Revenues generated from natural resources have also reduced the need of governments to rely on taxes as the primary source of revenue, which in turn reduces the incentive for governments to be accountable to citizens. In the case of Nigeria, the government’s heavy reliance on oil revenues has long hindered accountability between the state and citizens (Collier, 2015).

The EU employs various instruments to respond to issues arising from conflict in Africa.

Through its external financing instruments, the EU funds various projects and programmes to address fragility, help develop peaceful conflict resolution mechanisms at state and community levels, address the socio-economic root causes of conflict, support civil society and human rights and invest in resilience. In the context of the EU-Africa partnership on peace and security, the EU provides financial support, through its African Peace Facility, to peace support operations such as AMISOM in Somalia, while also assisting the institutional development of the African Peace and Security Architecture, in the spirit of enabling 'African solutions to African problems'. Finally, the EU has deployed several crisis management missions under its Common Security and Defence Policy to train, advise and build capacities of civilian and military security actors in conflict-affected states such as Mali or the Central African Republic.

Contrary to popular belief, migration in Africa is mostly an intra-continental phenomenon with varying patterns emerging across the continent.

Despite what is commonly assumed, 80% of African migrants stay within the continent (IOM/DFID, 2017). Africa also hosts over a quarter of the world’s refugees. And the proportion of migration flows from Africa in relation to its population is among the lowest in the world. Nevertheless, it is true that total emigration from Africa has substantially increased in absolute terms.

Distinct patterns of migration have emerged across the continent. For instance, migration from North Africa is distinctly extra-continental, as compared to other regions (UNCTAD, 2018). Out of the countries with the largest number of migrants in Africa¹, migration flows from Algeria, Egypt, Morocco and Nigeria were mainly outside of the continent, while migrants from Somalia, Burkina Faso, Democratic Republic of the Congo and Mali primarily moved to other countries within Africa. More than half of the main migration corridors for African migrants lie within Africa, with the corridor between Burkina Faso to neighbouring Côte d’Ivoire being one of the largest (IOM, 2018). Another significant one lies between North African countries to France, Spain and Italy, in part reflecting colonial legacies and geographical proximity.

Migration in Africa is driven by various complex and often interrelated factors.

As mentioned earlier, Africa has a large youth population and a lack of adequate job opportunities, which has obvious implications for migration aspirations in the continent. Africa has the lowest average age of migrants in the world, 31 years (UNCTAD, 2018). As current growth rates fail to create sufficient jobs, it is likely that young people will continue moving in search of economic opportunities. Another important driver

¹ This refers to countries of origin for the migrants.

for migration is climate change. Environmental hazards can threaten the economic livelihood of communities, especially those dependent on agriculture in Africa. This provides an impetus for people to migrate in search for more sustainable environments. Drought, for instance, has affected 7% of the population in North Africa and 22% in West Africa (UNCTAD, 2018).

Relatedly, political crises, terrorism and war has also contributed to migration both within and outside African countries. Refugee flows are important in terms of magnitude and recent growth. The total number of African refugees increased sharply from 2.9 million in 2010 to 4.6 million in 2015 (UNCTAD, 2018). However, most of these people were hosted by countries within Africa. It is also important to note that identifying individual drivers of migration is often not possible, and a combination of various external factors and personal aspirations can play a part in inducing individuals to migrate within and outside Africa.

Changing dynamics of migration from Africa to Europe has impacted EU-Africa relations.

While the migration crisis of 2015 in Europe may have passed, there are several structural problems that remain, not least related to integrating migrants in host countries. Currently the predominant narrative that influences EU policy focuses on the threat of migration to national security and welfare of European economies. This has contributed to an increased importance of development cooperation as a means of tackling the root causes of migration (via instruments such as the EU Trust Fund for Africa). At the continental level, the Africa-EU Partnership on Migration, Mobility and Employment under the Joint Africa-EU Strategy provides a formal channel through which Africa and the EU work together. The partnership particularly focuses on creating better jobs in Africa and better managing migration flows.

3. Development cooperation with Africa²

3.1. European development cooperation

Official Development Assistance of EU institutions and member states combined to Africa is close to 25 billion USD annually in recent years, as Figure 1 shows. As such, the EU is a major donor in Africa, as it represents around 40% of total ODA to the continent (40% in 2016 and 36% in 2017 to be precise). At the same time, EU ODA to Africa is almost one third of all EU ODA worldwide, namely 30% in 2016 and 29% in 2017.

Among EU actors, EU institutions are the largest donor in Africa, as Figure 2 shows for the year 2017. The top five recipients that year of ODA of EU institutions and member states combined were Tunisia, Morocco, Somalia, Nigeria and Ethiopia (see Figure 3). Finally, Figure 4 presents the top sectors for EU ODA in 2017, which shows that social infrastructure and services was by far the largest.

² All figures in this paper are authors' own compilation based on data from the OECD DAC database.

Figure 1: EU ODA: Total ODA commitments to Africa over 10 years

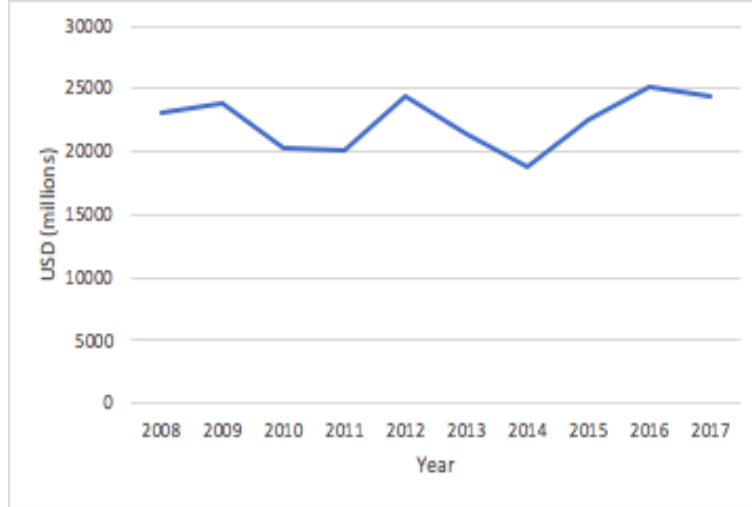


Figure 2: EU ODA: Top 10 European donors in Africa in 2017

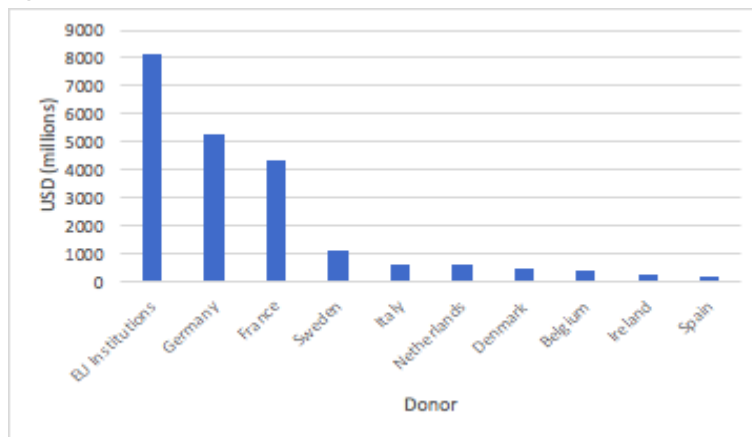


Figure 3: EU ODA: Top 10 African country recipients in 2017

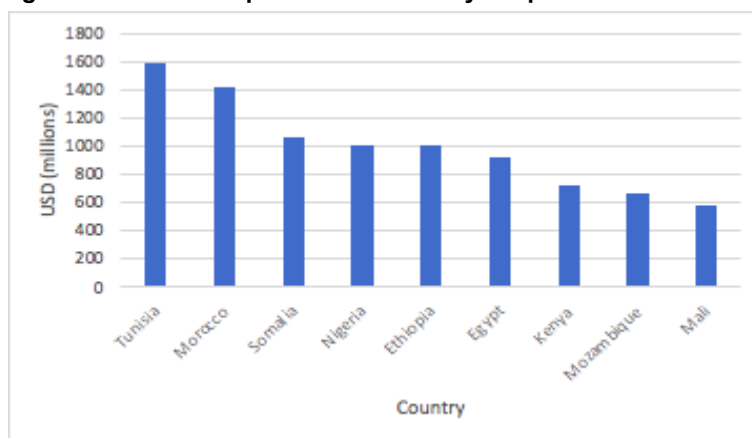
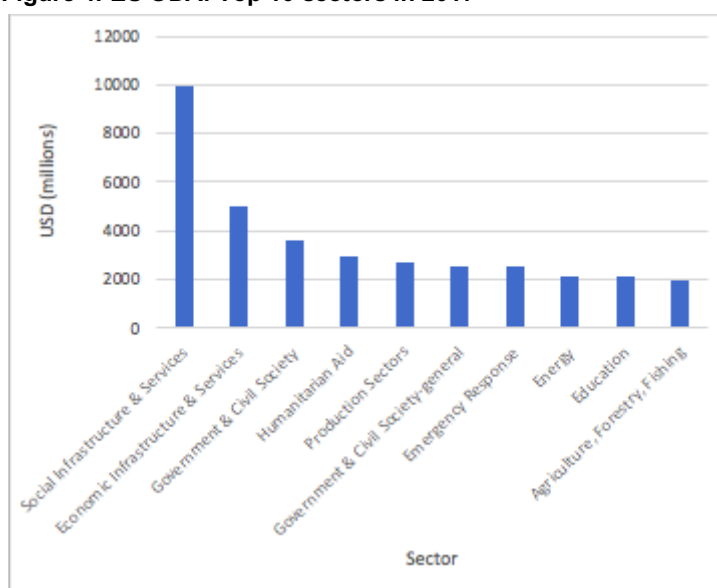


Figure 4: EU ODA: Top 10 sectors in 2017



The next subsections will look more closely at a select number of subsectors, at the specific request of the Estonian Ministry of Foreign Affairs. These are agro-industries, forest industries, information and communication technology and finally renewable energy. **This data should be interpreted with particular care.** This is primarily the case as **donors report to the OECD DAC by programme and each programme can be reported under a single code (i.e. subsector) only.** But especially for large complex programmes, there could be different activities that, if reported separately, would fall under different codes.

The following table provides a list of the DAC Credit Reporting System (CRS) codes used and their descriptions.

Table 1: OECD DAC CRS codes and description

Codes	Description
Agro-industries (CRS code 32161)	Staple food processing, dairy products, slaughter houses and equipment, meat and fish processing and preserving, oils/fats, sugar refineries, beverages/tobacco, animal feeds production.
Forest Industries (CRS code 32162)	Wood production, pulp/paper production.
Information and communication technology (ICT) (CRS code 22040)	Computer hardware and software; internet access; IT training. When sector cannot be specified.
Energy generation, renewable sources (DAC 5 code 232)	This includes total renewable energy generated by multiple technologies (that cannot be attributed to one technology), hydro-electric power plants, solar energy, wind energy, marine energy, geothermal energy, biofuel-fired power plants.

3.2. Agro-industries

According to the International Development Statistics online databases of the OECD DAC, total ODA related to agro-industries to Africa of all donors hovered around 50 million USD annually from 2008 to 2016 (see Figure 5). It rose sharply in 2017 to 300 million USD³. Since the increase in 2017 is very large, it is difficult to compare top countries on average over the past 10 years to those in 2017, which included Congo, Nigeria, DRC, Morocco and Ethiopia (as shown in Figure 7). The World Bank was by far the largest donor in this space, as Figure 8 shows. It operates in this subsector in many different African countries, together with a small number of other donors (see Table 2).

Figure 5: Agro-industries: Total ODA commitments over 10 years

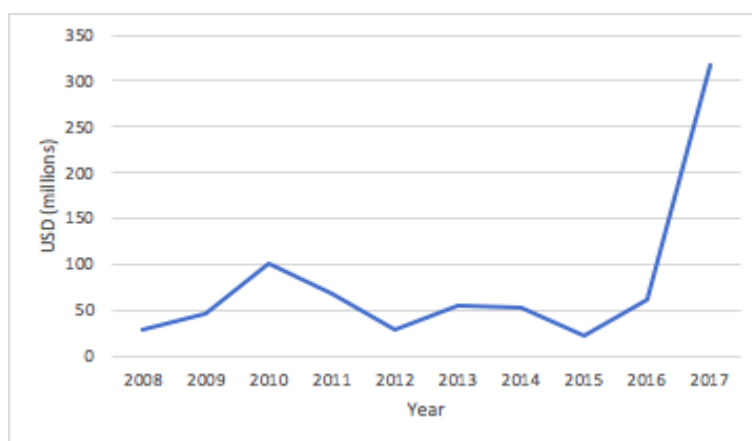
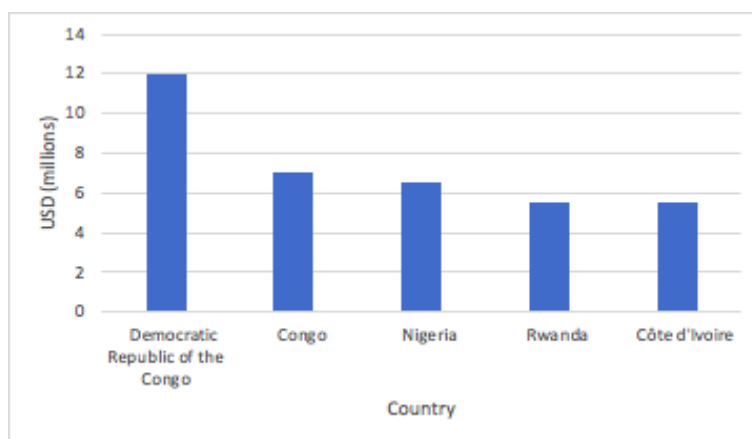


Figure 6: Agro-industries: Top recipients (average over 10 years)



³ This significant rise in ODA is visible in many countries (including top countries on average and in 2017) and may point to the start of a large project across different countries.

Figure 7: Agro-industries: Top recipients in 2017

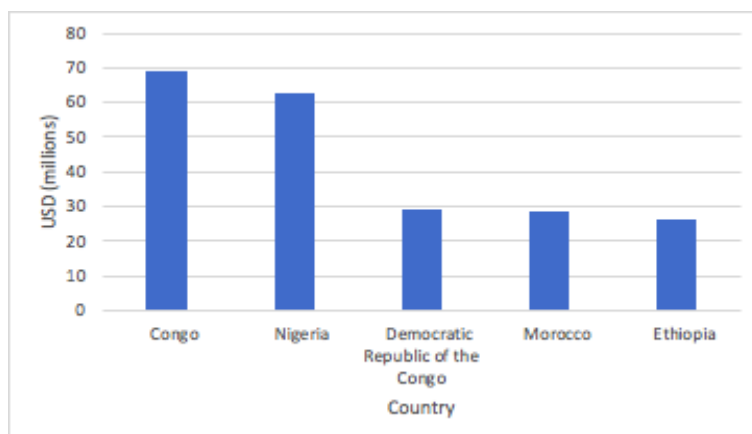


Figure 8: Agro-industries: Top donors in 2017

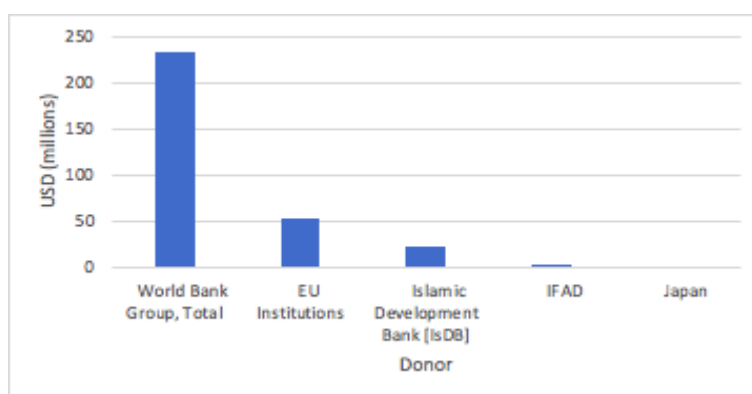


Table 2: Agro-industries: Donors of top recipients in 2017

Recipient	Donors in 2017
Congo	World Bank
Nigeria	Japan, US, Islamic Development Bank, World Bank
Democratic Republic of Congo	Switzerland, World Bank
Morocco	France, Japan, Spain, EU Institutions
Ethiopia	World Bank

3.3. Forest industries

Compared to agro-industries support, the level of ODA going to forest industries as recorded by the OECD DAC is considerably lower, not exceeding 12 million USD annually in the last 10 years (see Figure 9). Figure 9 shows that the level is highly volatile, which may be partly due to the small envelope, as one new project may lead to a spike. Tanzania and Morocco were by far the top recipients on average over the period 2008 - 2017, while Ethiopia trumps all in 2017 (see Figure 10 and 11). According to the OECD DAC data, a very small number of donors engage in this sub-sector in Africa (see Figure 12 and Table 3). Again, as a reminder, this should be interpreted with care, as some donors may be active in this sector, without detailing in their reporting to the OECD DAC.

Figure 9: Forest Industries: Total ODA commitments over 10 years

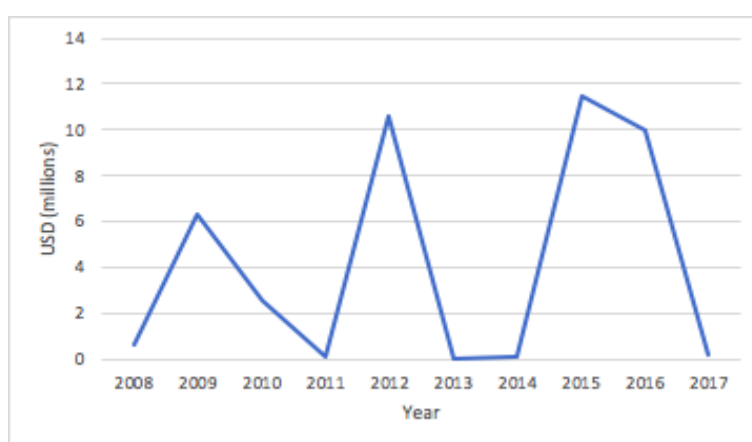


Figure 10: Forest Industries: Top recipients (average over 10 years)

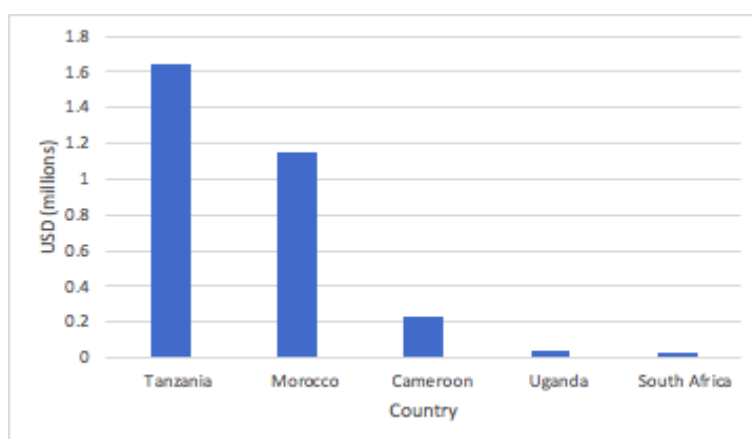


Figure 11: Forest Industries: Top recipients in 2017

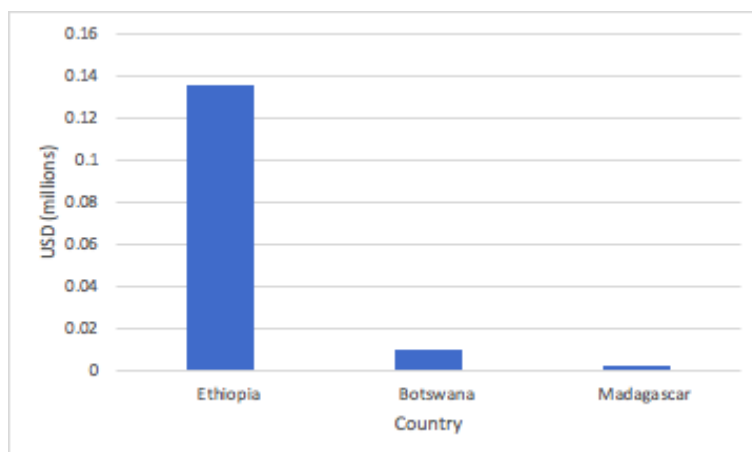


Figure 12: Forest Industries: Top donors in 2017

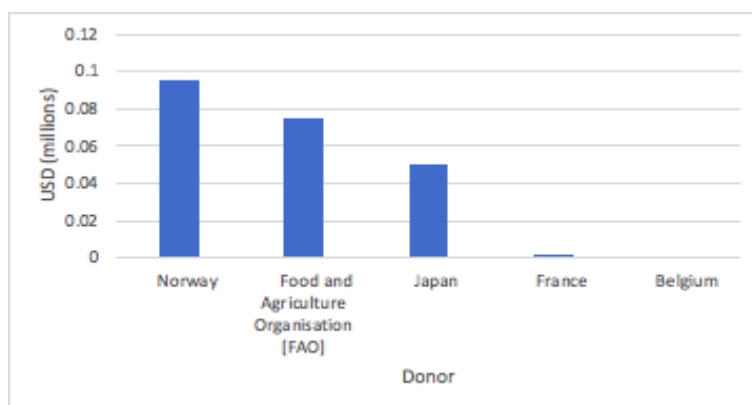


Table 3: Forest Industries: Donors of top recipients in 2017

Recipient	Donors in 2017
Ethiopia	Japan, Norway
Botswana	Japan
Madagascar	France

3.4. Information and communication technology

Specific ODA to the ICT sector remained below 150 million USD in the period 2008 - 2016, but spiked in 2017 to almost 250 million USD (see Figure 13). Top recipients in this ten-year period were the DRC, Kenya, Malawi, Mali and Uganda (Figure 14). In 2017 alone, the list of top recipients was completely different, with the exception of Malawi. That year, Guinea-Bissau, Senegal, Niger and Ethiopia were in the top five (Figure 15). The subsector is largely dominated by the World Bank, while the data shows that

others are also operating in this area, such as Luxembourg, EU institutions, Canada and the US (Figure 16 and Table 4).

Figure 13: ICT: Total ODA commitments over 10 years

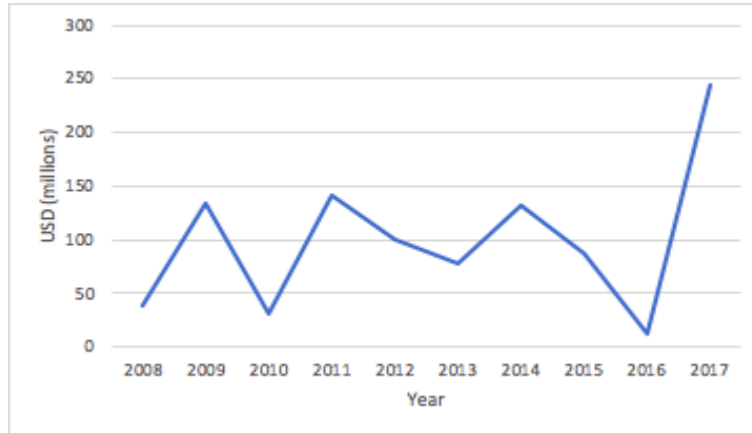


Figure 14: ICT: Top recipients (average over 10 years)

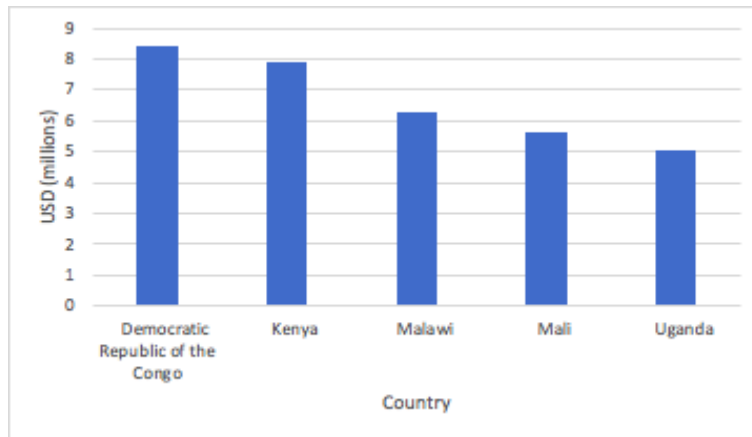


Figure 15: ICT: Top recipients in 2017

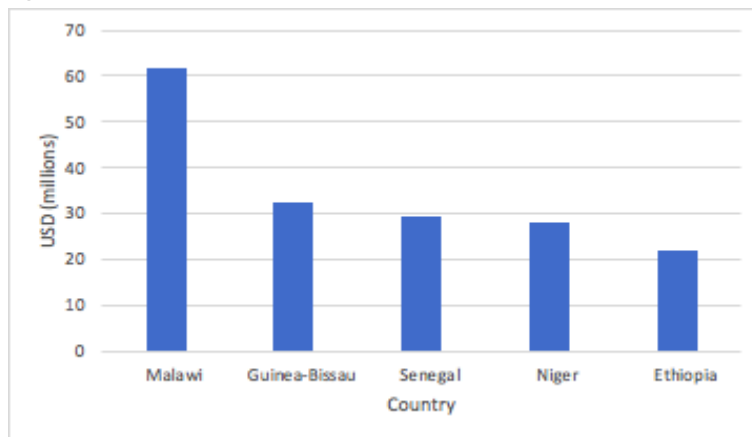


Figure 16: Top donors in 2017

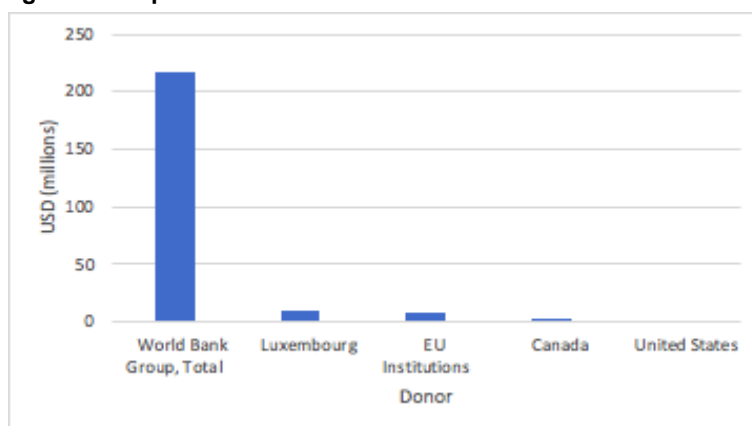


Table 4: ICT: Donors of top recipients in 2017

Recipient	Donors in 2017
Malawi	UNICEF, World Bank
Guinea-Bissau	UNICEF, World Bank
Senegal	Canada, Korea, IFAD, World Bank
Niger	World Bank
Ethiopia	Korea, World Bank

3.5. Renewable energy

ODA dedicated to renewable energy in Africa - and worldwide - shows a rising trend in the last decade. It stood at approximately 2 billion USD in 2017 according to the OECD DAC (see Figure 17). As Figure 18 shows, more than half of ODA (57%) dedicated to renewable energy is generated from multiple technologies (that cannot be attributed to a single technology), followed by solar energy (29%). Top recipients in this period were Morocco, Kenya, Egypt, South Africa and Ethiopia (Figure 19). In 2017 alone, Benin and Kenya were also in the top 5 (Figure 20). Finally, Table 5 shows that a large number of donors engage in the area of renewable energy in Africa.

Figure 17: Renewable Energy: Total ODA commitments over 10 years

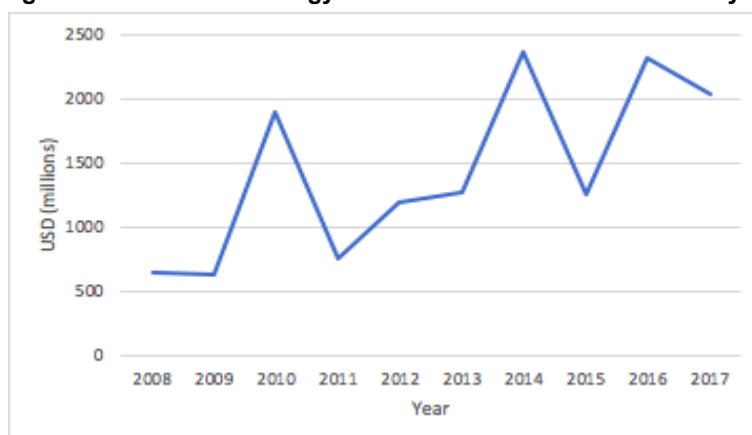


Figure 18: Renewable Energy: Technology share

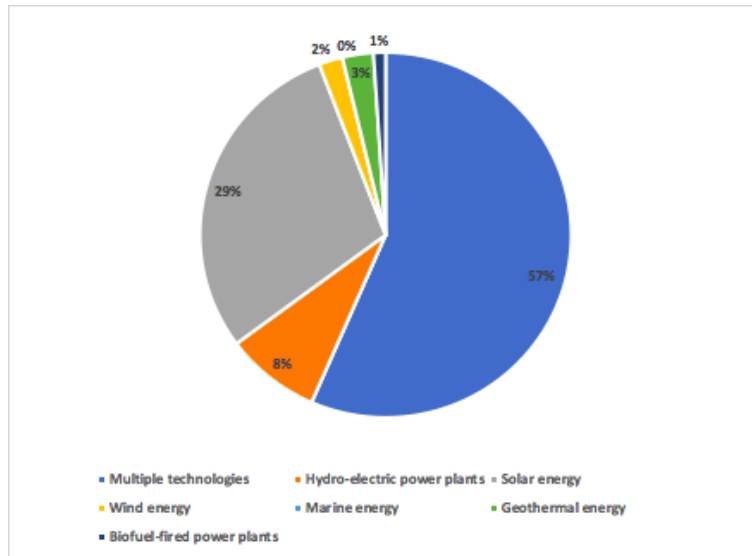


Figure 19: Renewable Energy: Top recipients (average over 10 years)

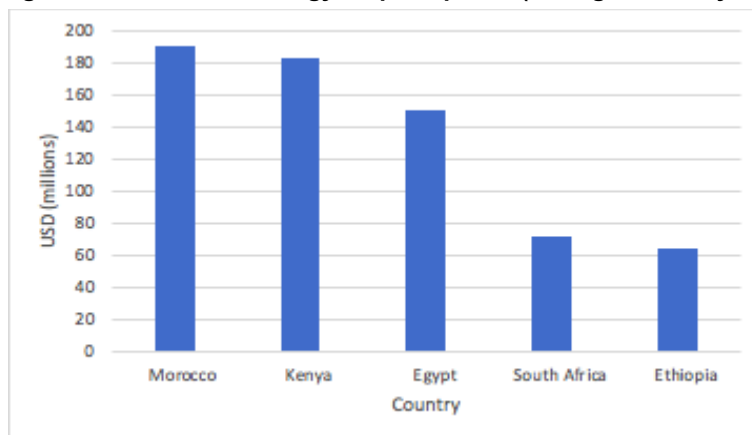


Figure 20: Renewable Energy: Top recipients in 2017

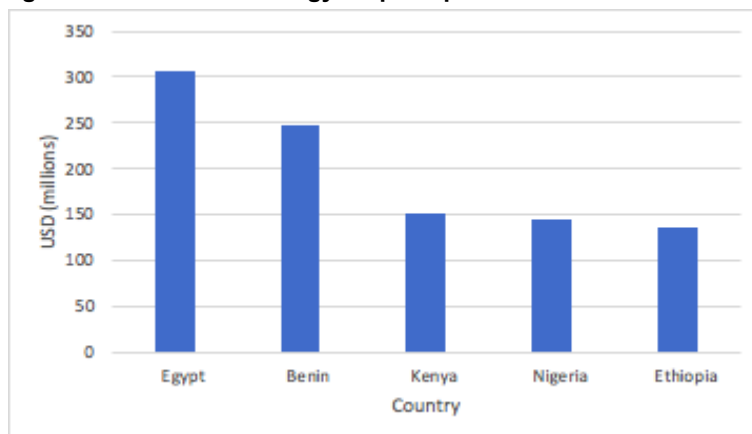


Figure 21: Renewable Energy: Top donors in 2017

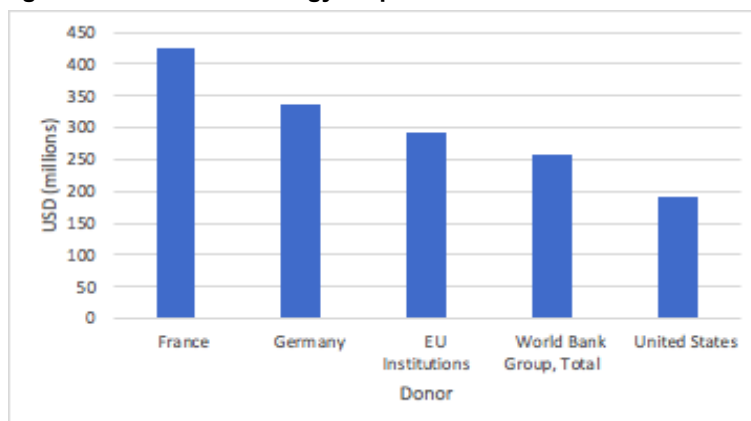


Table 5: Renewable Energy: Donors of top recipients in 2017

Recipient	Donors in 2017
Egypt	Austria, Denmark, France, Germany, Japan, EU Institutions, UNDP, Arab Fund (AFSD), Kuwait, UAE
Benin	Austria, France, US, EU Institutions, UNDP
Kenya	Finland, France, Germany, Italy, Japan, Norway, Spain, Sweden, Switzerland, UK, US, EU Institutions, World Bank
Nigeria	Germany, US, EU Institutions, UNDP, Climate Investment Fund (CEF), Global Environmental Facility (GEF)
Ethiopia	Denmark, Finland, France, Italy, Japan, Korea, Norway, Sweden, Switzerland, UK

4. Lessons learnt from Africa strategies of EU member states

While many EU member states operate in and with African countries and actors, only a few have a strategic document focused on cooperation with Africa. This includes **Germany**, which adopted an Africa strategy in March 2019, as well as **Ireland**, whose strategy dates from 2011 and is currently in the process of renewing it. In this section, we present a select number of key take-aways from those documents, which may inform Estonia's initiative to define an Africa strategy. Given country similarities, we also draw lessons from Eastern European member states' approaches to Africa, as specified in their global development strategies. This includes **Hungary**, **Poland** and **Slovakia**. We have done the same for **Luxembourg**, which is among the smaller economies of the EU, as Estonia. Finally, given its considerable presence in Africa, **France's** approach to Africa has been analysed, especially as presented in Macron's speech in

Ouagadougou in November 2017. We also take inspiration from the EU's new Africa - Europe Alliance for Sustainable Investment and Jobs presented by the European Commission in September 2018.⁴

4.1. Consider going beyond development cooperation and the bilateral channel

Both the German and the Irish Africa strategies go beyond development cooperation. This is in line with the EU-level approach to Africa, which is moving from a primarily donor - recipient and resource extraction type of relationship towards a more comprehensive and balanced partnership. **In the case of Germany, the Africa strategy is Federal Government-wide.** It is made explicit that Germany strives for 'comprehensive' relations' with Africa. The strategy includes references to development policy, but also foreign, migration security, and arms export policies. **In the case of Ireland, it is a strategy for the Department of Foreign Affairs and Trade.** In fact, the strategy explicitly notes that while Ireland's engagement with Africa has historically been focused on humanitarian and development assistance and peacekeeping, the relation is increasingly expanding into other areas. Even if for institutional, political or other reasons the Estonia strategy has to be more limited in scope, it could confirm Estonia's commitment to policy coherence for sustainable development more broadly.

Relatedly, the two strategies do not only ambition to contribute to Africa's sustainable development, but **are clear about Germany's and Ireland's self interest.** The German strategy notes that "We want to be a reliable partner for Africa and work together in the interest of both sides". This includes in both cases emphasis on trade and investment opportunities for their companies, as well as advancement of political objectives. Even on a sensitive topic as migration, the German government is upfront about European interests and possible clashes with African interests. It states that "We take the worries and concerns of African states seriously, but will always be mindful of European interests. We seek to balance fairly all interests at stake".

It may be worth considering to **set up or adapt institutional structures to facilitate a coherent approach towards Africa.** For example, the German government specifies in its Africa strategy that it has set up a steering group on Africa at State Secretary level to strengthen coordination. The Irish strategy notes that the Department of Foreign Affairs and Trade will establish a single Africa Unit bringing together the existing Africa Section from Political Division and Programme Desks from Development Cooperation Division, which will also manage aspects related to foreign trade and investment promotion activities.

Furthermore, in terms of scope, the strategy can guide bilateral cooperation, as well as engagement through the EU and the UN. Different channels can be used for engagement on and with Africa, which merits to be recognised in an Africa strategy. Ireland explicitly commits to engaging more on African issues at the EU and UN level. Towards this goal, the strategy states that the Permanent Representation of Ireland to the EU will prepare a report on ways to strengthen its capacities to engage with EU institutions on African issues. It also notes that Ireland's UN missions will undertake an exercise to prepare policy options for increased engagement at UN level with African countries on issues such as migration and climate change. Macron in his 2017 Ouagadougou speech put emphasis on the importance of EU - Africa dialogue, in particular for continent-to-continent exchanges.

⁴ The new President of the European Commission Mrs Ursula von der Leyen has tasked the Commissioner-designate for International Partnerships to work with the High Representative on a new comprehensive strategy for Africa. This is a process for Estonia to follow and engage in.

4.2. Strategic country and sector focus

Given the limited human and financial resources of Estonia, the engagement in terms of countries and sectors in Africa needs to be limited, to avoid spreading too thin and thereby reducing impact potential. While this may seem an obvious general principle, it is particularly relevant for the African continent, which is composed of a very diverse set of over 50 countries, faced with different and complex challenges. Table 6 presents the number of African partner countries of the EU member state selection.

Table 6: Number and names of African partner countries of the EU member states selection

	Germany	Ireland	France	Luxembourg ⁵	Poland	Slovakia
Total number of partner countries	50	9	19	7	10	3
Number of African partner countries	23	8	18	5	4	1
Names of partner countries	Egypt, Ethiopia, Benin, Burkina Faso, Burundi, Ghana, Cameroon, Kenya, DR Congo, Mali, Malawi, Morocco, Mauritania, Mozambique, Namibia, Niger, Rwanda, Zambia, South Africa, South Sudan, Tanzania, Togo, Uganda	Ethiopia Lesotho Malawi Mozambique Tanzania Uganda Zambia	Benin, Burkina Faso, Burundi, Comores, Djibouti, Ethiopia, Gambia, Guinée, Liberia, Madagascar, Mali, Mauritanie, Niger, CAR, RDC, Senegal, Tchad, Togo	Burkina Faso, Cabo Verde, Mali, Niger and Senegal	Ethiopia Kenya Senegal Tanzania	Kenya
Total ODA commitments 2017 (USD, millions)	5290	261	4379	129	26	3,3

How did these EU members come to a suitable country and sector selection? We'll go through the main selection criteria and possible implications for Estonia in Africa.

Development needs

The **European Consensus on Development**, which sets out to guide development cooperation at EU and at member states' level notes that **resources will be targeted "to where the need is greatest, especially LDCs and countries in states of fragility and conflict"** (EU, 2017). This is explicitly reflected in selection criteria presented by EU member states. For example, Luxembourg states that priority partner countries will primarily be identified among those with the largest poverty gap, with a low human development index and limited access to financial resources beyond aid. It also explicitly mentions a focus

⁵ Luxembourg has privileged relations with seven priority partner countries, with which they conclude general cooperation agreements and multi-annual "Indicative Country Programmes". Beyond this, Luxembourg also directly intervenes, through LuxDev, in five other partner countries, where interventions are primarily project-driven, none of which is on the African continent.

on LDCs and fragile countries⁶, as others such as Ireland do, in line with the European Consensus on Development. While it doesn't hold true for Estonia's current partner countries, Estonia's Strategy for Development Cooperation and Humanitarian Aid 2016 - 2020 does indicate that Estonia will respond to the needs of other (non-partner) countries in a flexible manner, in particular "needs of least developed and post-conflict countries, namely developing island states and developing landlocked states in areas where Estonia can offer a clear added value". Increased focus on Africa offers an opportunity to enhance Estonia's engagement with such countries.

There are currently 47 countries on the United Nations list of LDCs, of which 33 are African.⁷ Given the European Consensus on Development and its own national development cooperation strategy, similar to other EU member states, **it is worth for Estonia to consider adding one or more African LDCs to its list of partner countries. Furthermore, African states that are in a post-conflict situation and/or are developing island states or landlocked also deserve to be considered**, while balancing with other selection criteria.

National interests

National interests demonstratively also guide the selection of countries and sectors of the EU and many of its member states. For example, Ireland focuses on countries "whose economic development demonstrates potential in the short to medium term for Irish **business**" and "sectors which will provide high growth and export potential for Ireland". Relatedly, Slovakia's focus is guided by the 'potential of involving the private sector in ODA'. Poland and Hungary explicitly state that **security concerns** inform their country selection. **Curbing migration** may be another objective, which can lead to specific attention for African countries of origin or transit of migrants, and a sector focus in those countries that is considered to address the root causes of migration. **The extent to which these or other national interests will guide Estonia's approach obviously will depend on the objective(s) of Estonia's Africa strategy.**

Comparative advantage

Comparative advantage is another key criterion that drives country and sector focus of EU member states, as clearly stated by countries like France, Hungary, Ireland and Luxembourg. They **focus on sectors where they have relevant expertise and experience and in countries where there is demand for engagement/support in these sectors.**

In the case of Estonia, e-governance and ICT more generally are obvious ones, which are areas with considerable needs and potential in many African countries, as described in Section 2. Box 1 presents a categorisation of African countries based on their status of e-governance, as presented in a European Commission report (2019). This categorisation may help guide Estonia's country selection, depending on which e-governance level it wishes to prioritise. For example, does Estonia want to prioritise supporting least advanced e-governance countries (Group 3), where needs may be highest, but progress is difficult to achieve and commercial opportunities for Estonian ICT companies may be limited and/or risky in the short

⁶ There is no single globally accepted list of fragile states. The World Bank does produce annually a harmonised list of fragile situations, based on different indices. African countries that feature on the list in 2019 are: Burundi, Central African Republic, Chad, Comoros, DRC, Congo, Côte d'Ivoire, Djibouti, Eritrea, The Gambia, Guinea-Bissau, Liberia, Mali, Mozambique, Somalia, South Sudan, Togo and Zimbabwe. Source: <https://www.worldbank.org/en/topic/fragilityconflictviolence/brief/harmonized-list-of-fragile-situations>

⁷ These are Angola, Benin, Burkina Faso, Burundi, Central African Republic, Chad, Comoros, DRC, Djibouti, Eritrea, Ethiopia, Gambia, Guinea, Guinea-Bissau, Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritania, Mozambique, Niger, Rwanda, Senegal, Sierra Leone, Somalia, South Sudan, Sudan, Togo, Uganda, Tanzania and Zambia. Source: <https://www.un.org/development/desa/dpad/least-developed-country-category.html>

run? Or prioritise countries more advanced in the area of e-governance, or a combination of both? Choices for Estonia to make, while also taking into account other selection criteria.

Box 1: Categorisation of African countries on progress in the area of e-governance

Group 1: countries that have implemented various services with an organisational structure and at least basic regulation, and that in most cases have some form of digital ID and interoperability. These countries are assessed to have the necessary preconditions for continued development and the ability to serve as regional examples and leaders. These countries are **Botswana, Cape Verde, Egypt, Ghana, Kenya, Mauritius, Morocco, Namibia, Rwanda, Seychelles, South Africa and Tunisia.**

Group 2: countries that are not as advanced or where the progress is more uneven than for those in Group 1, but where there are examples of projects, reforms and initiatives, which can be built upon. The group is divided in three tiers, to illustrate the difference that exists between the states in this group. The first tier is close to the first group but for various reasons these countries are somewhat less advanced. In third tier countries there has not been very much development, or it has been halted for different reasons, but there are still better prospects than for Group 3 countries. Logically, Tier 2 countries' progress and prospects in e-governance are in between progress and projects of Tier 1 and Tier 3 countries. **Tier 1 countries are Algeria, Benin, Lesotho, Nigeria, Eswatini (Swaziland), Tanzania, Uganda and Zimbabwe. Tier 2 countries are Angola, Burkina Faso, Côte d'Ivoire, Gabon, Madagascar, Mozambique, Sao Tome and Principe, Senegal, Togo and Zambia. Tier 3 countries are Cameroon, Comores, Ethiopia, Gambia, Liberia, Libya, Mali and Sudan.**

Group 3: countries that are least advanced on the African continent as regards e-governance. Many of these countries lack government portals or have limited portals. These countries to a large extent are experiencing or have recently experienced armed conflict and/or famine, and/or are among the least developed and poorest states of the world. Even if e-governance initiatives can be very useful for such countries and in some cases, may allow to leap-frog to faster development, there could be issues with finding adequate national capacity for knowledge transfer and sustainability of reforms. This does not mean that the countries should be excluded from any assistance but the way assistance is designed might have to look quite different than in the countries with a high level of achievements in the sphere of e-governance. These countries are **Burundi, Central African Republic, Chad, DRC, Guinea Bissau, Djibouti, Eritrea, Equatorial Guinea, Guinea, Malawi, Niger, Sierra Leone, Somalia, South-Sudan.**

Source: European Commission, 2019

Other (sub)sectors in which Estonia may have potential comparative advantages include agri-business, timber industry and renewable energy. For this reason, at the request of the Ministry of Foreign Affairs, the previous section provided some insights in development cooperation in Africa in these areas, in particular which African countries and donors are most active. This may provide insights to dive deeper into the needs and interests of these African countries and/or further explore possible synergies, collaboration and/or a division of labour with these donors.

Relatedly, the **presence or interest of an EU member state's NGOs or private sector actors in African countries is also a factor that can be taken into account.** Estonian NGOs operating in Africa with considerable projects are Mondo in **Ghana, Kenya and Uganda**, the Tallinn Development and Training Centre in **Uganda**, e-Governance Academy in **Tunisia**⁸, Estonian Doctors Help the World in **Kenya** and Damota in **Ethiopia**. Several Estonian companies have been active in ICT (primarily through development

⁸ While the Governance Academy is situated in Tunisia, it carries out projects in many other African countries. It has done so in Angola, Benin, Kenya, Madagascar, Mauritius, Namibia, Sao Tome and Principe, Zambia and Tanzania.

cooperation) in **Kenya, Benin, Ghana, Nigeria, Tunisia, Uganda, Botswana, Nigeria, Namibia, South Africa, Tanzania, Mauritius, Tanzania, Congo and Egypt.**

Language also affects comparative advantages. Estonia is likely to be better placed to operate in anglophone, rather than francophone and lusophone countries.

Diplomatic presence

Diplomatic presence can play a role in partner country selection, and vice versa, interest in specific countries leads EU Member States to ensure on-the-ground representation. Ireland explicitly states in its Africa strategy that “Ireland’s embassy network will play a crucially important role”.

Estonia currently has one embassy in Africa, namely in Cairo. It covers Ethiopia, United Arab Emirates, Qatar, Kuwait, the African Union and the Arab League. Estonia is represented by Honorary Consuls in South Africa, Mauritius, Angola, Kenya, Ghana and Mali. In this regard, it is interesting to note that Ireland’s Africa strategy indicates that “The Department will explore how best we can strengthen the roles of our Honorary Consuls in Africa on trade and business, including through specific training.” Similarly, Estonia could explore if/how to better use its honorary consuls and for what purpose. Furthermore, it could explore if/how EU delegations in African countries can be better used.

Division of labour

Luxembourg indicates in its general development cooperation strategy that it “will also consider countries where the number of development partners active is small despite still facing significant development and/or migration challenges”. In other words, it takes into account the division of labour among donors. Poland notes explicitly that “the choice of thematic priorities in priority countries was influenced by the division of labour with other international donors”.

Bringing the criteria together

Very tentatively, the following countries may be worth considering, among others⁹:

- **Uganda** - an Eastern African LDC that is landlocked and anglophone country, in which some Estonian companies and at least one NGO are/have been active. It has promising ICT and e-governance reforms and initiatives to build on, such as Digital Uganda Vision that provides a unified direction for ICT development, while still having important needs.
- **Ethiopia** - an Eastern African LDC that is landlocked and anglophone, which is undergoing an impressive transformation through a comprehensive set of reforms. An Estonian NGO Damota has a foothold there and the country is covered by the Cairo Embassy. Ethiopia houses the AUC, so synergies may be found between active bilateral engagement with Ethiopia and with the AUC, for example for the implementation of the AUC - Estonia Memorandum of Understanding signed in 2017. Renewable energy is on the rise and Ethiopia is one of the top five African ODA recipients in this area in the last decade.
- **Kenya** - an Eastern African anglophone middle income country (not an LDC), not landlocked, but with many remaining sustainable development challenges. There is some Estonian NGO and private sector presence, and an honorary consul in place. It was categorised in Group 1 on e-governance (EC, 2019), indicating that it could serve as a valuable regional e-governance leader setting the example. Somewhat of a donor darling, as illustrated by the many donors (13 donors) providing support related to renewable energy.

⁹ No considerations related to agro-industry or timber industry were included in this list, as the sections 3.2 and 3.3. did not provide sufficiently conclusive data to do that.

- **Egypt** - a middle income post-conflict country in Northern Africa, with an Estonian embassy. As Kenya, e-governance has high potential (EC, 2019). Interesting dynamics in the area of renewable energy, and a top African ODA recipient in this sector in 2017.
- **Ghana** - a middle income anglophone country in West Africa, which is not landlocked. Estonian NGOs and private sector actors have operated in Ghana.

Selecting partner countries and sectors is far from a mathematical exercise. As section 4.2 has illustrated, it will be a delicate weighting of criteria considered important by Estonia for its engagement in Africa. For example, a country where Estonia has a diplomatic presence or a good fit with its expertise in the ICT sector may not be a least developed country. In the end, these will be political decisions, but they should be informed by sufficient clarity on the relevant criteria, how potential African partner countries/sectors score on these criteria, and what the trade-offs are.

5. Concluding remarks and questions for discussion

This report has provided an overview of key trends in Africa. It highlighted major opportunities and challenges for sustainable development in Africa. It is timely for Estonia to step up its engagement in Africa, with African countries going through major transformations and Africa being higher up the EU agenda. The report also presented data on ODA going to Africa, including in potentially interesting sectors for Estonia to operate in, namely agro-industries, forest industries, ICT and renewable energy. This was followed by insights drawn from Africa strategies and approaches of a selection of EU member states. This encompassed considerations when determining the geographical and sectoral focus in Africa. Main selection criteria discussed were development needs, national interests, comparative advantages, diplomatic presence and division of labour.

While this report seeks to provide useful insights to inform the future Africa strategy of Estonia, it is only a starting point of the process. Estonian stakeholders would need to deliberate on some of the key considerations discussed in this report. Further questions to guide Estonian decisions-making include:

- To what extent is it feasible and desirable for Estonia's Africa strategy to go beyond development cooperation and how?
- What can we learn from experiences of Estonian actors in African countries, particularly to inform the geographical and sectoral focus?
- What selection criteria do you consider important and what would the implications be in terms of geographical and sectoral focus?
- To what extent do you think Estonia should envisage to step up collaboration with the AU and possibly other regional organisations? In which areas?

In the end, it is up to Estonia and its people – together with its African counterparts – to shape the partnership. ECDPM is delighted to support part of this process.

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HEAD OFFICE
SIÈGE
Onze Lieve Vrouweplein 21
6211 HE Maastricht
The Netherlands *Pays Bas*
Tel +31 (0)43 350 29 00
Fax +31 (0)43 350 29 02

BRUSSELS OFFICE
BUREAU DE BRUXELLES
Rue Archimède 5
1000 Brussels *Bruxelles*
Belgium *Belgique*
Tel +32 (0)2 237 43 10
Fax +32 (0)2 237 43 19

info@ecdpm.org
www.ecdpm.org
KvK 41077447