



**AFRICA  
GOVERNANCE AND  
DEVELOPMENT  
OUTLOOK  
2024**

---

# AFRICA GOVERNANCE AND DEVELOPMENT OUTLOOK 2024



## About UNDP

UNDP is the leading United Nations organization fighting to end the injustice of poverty, inequality, and climate change. Working with our broad network of experts and partners in 170 countries, we help nations to build integrated, lasting solutions for people and planet. Learn more at [undp.org](https://undp.org) or follow at [@UNDP](https://twitter.com/UNDP).

## About the Regional Programme for Africa

The Regional Programme for Africa is a flagship UNDP programme that responds to challenges and opportunities facing the African continent and to the priorities and aspirations of Africa as articulated by the African Union and other regional organs. Based at the Regional Service Centre for Africa (RSCA) in Addis Ababa, we collaborate and coordinate with UNDP sub-regional hubs operating out of Dakar, Nairobi and Pretoria and work closely with the AU, Regional Economic Communities (RECs)/Regional Mechanisms (RMs) and other regional actors across the continent.

Copyright © UNDP 2024. All rights reserved

## Introduction

For 2024 to be an exemplary year for the African continent, continental leaders in government and business alike must individually and collectively address and navigate a complex set of domestic, regional and international risks and challenges.

International attention continues to be shaped by what many are referring to as a new era of global “polycrises,” in which expanding theatres of war, the negative impacts of climate change, growing economic inequalities, debt crises and the wider effects of the COVID-19 health pandemic intersect with other factors to create a sense of present and mounting peril at large.<sup>1</sup> This global context is at the same

time marked by increasing polarization and challenges to multilateral cooperation and norms. The need for all stakeholders to focus on constructively supporting the fundamental drivers of Africa’s promise while at the same time ensuring its resilience to complex and interdependent risks is more pronounced than ever.

This paper starts by providing a snapshot of current growth and development indicators and forecasts for Africa. It then scans the horizon for trends and issues pertaining to Africa’s governance and development context that are likely to have a decisive impact on these indicators in the year ahead. In so doing, it takes stock of some of the key achievements and challenges experienced in 2023.

---

<sup>1</sup> The term polycrisis has become mainstream policy parlance, with world leaders including United Nations Secretary General António Guterres warning of its dangers. See for instance: [UN Secretary-General calls for radical transformation of global financial system to tackle pressing global challenges](#), United Nations.

## Promising growth but steep development

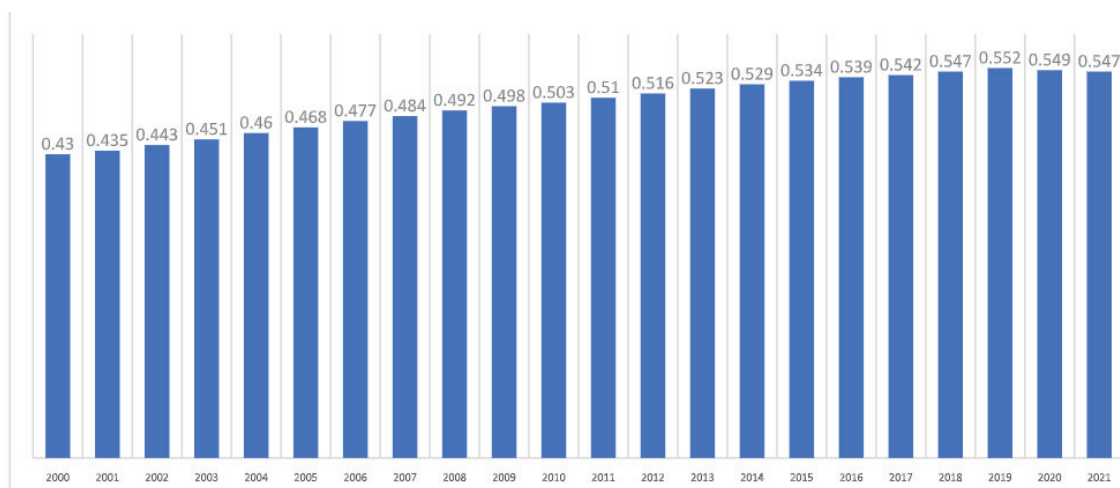
Africa's overall growth rates have been robust over the past few decades, bringing significant development progress and improving the quality of life for many of its citizens.<sup>2</sup> The continent has witnessed promising growth and a sustained regional integration agenda, especially given the advancements made in the implementation of the African Continental Free Trade Area (AfCFTA). However, global economic uncertainty, hastened by COVID-19 and the fall-out of the Ukraine War, exacerbated structural imbalances, climate change impacts and the effects of conflict and fragility.

These and other factors may be behind what is seen as a brake on Africa's positive trajectory. According to World Bank data, sub-Saharan Africa's economic growth decelerated to 2.5 percent in 2023, from 3.6 percent in 2022.<sup>3</sup> Some degree of turnaround is anticipated in 2024, with the International Monetary Fund (IMF) and Economic Intelligence Unit (EIU) forecasting Africa will be the second fastest growing major region in 2024, at an average of 4 percent.<sup>4</sup> However, as identified by the British think-tank Chatham House, "behind the headline figure is a less auspicious reality."<sup>5</sup>

Inflation across the continent was high in 2023, with a regional average of 18.5 percent, driving up living costs.<sup>6</sup> According to the EIU, inflation pressures are expected to ease in 2024 for all but a handful of African countries, with double-digit inflation expected to continue to afflict Angola, the Democratic Republic of the Congo, Egypt, Ethiopia, Ghana, Nigeria, Sudan and Zimbabwe.<sup>7</sup>

Food insecurity, which rose steeply during the past year, may deteriorate further in some countries. An estimated 160 million Africans suffer from acute food insecurity, representing about 13 percent of the continental population.<sup>8</sup> In 2024, 17 million African citizens (9 percent of the population, of which over one million are children) will be at risk of severe food insecurity. Forecasts are particularly alarming for West and Central Africa, where the number of hungry people is set to reach 49.5 million by mid-2024, as well as for the Democratic Republic of the Congo, where 23.4 million people (approximately one-quarter of the population) are projected to be acutely food insecure during the first half of 2024.<sup>9</sup>

## Human Development Index sub-Saharan Africa (2000 to 2021)



Source: UNDP Human Development Index

<sup>2</sup> African countries in the lowest 25 percent of HDI rankings had improved their status by 82 percent between 1970 and 2010, representing twice the average gain worldwide, [UNDP 2011 Human Development Report](#); Improvements in governance over the decade from 2009-2019 have also been reported, [2020 Ibrahim Index of Africa Governance](#).

<sup>3</sup> [The World Bank in Africa](#), World Bank (2023).

<sup>4</sup> EIU (2024). Africa Outlook 2024.

<sup>5</sup> [What's at stake for Africa in 2024?](#) Chatham House – International Affairs Think Tank.

<sup>6</sup> [Africa: trends to watch in 2024](#), miningreview.com – West and Central African CFA franc zone countries have been somewhat protected through currency pegs to the euro.

<sup>7</sup> EIU (2024). Africa Outlook 2024.

<sup>8</sup> [Africa: trends to watch in 2024](#), miningreview.com.

<sup>9</sup> According to [World Food Programme data](#).

The fallout of the recent economic contraction on development progress is apparent. In 2022, sub-Saharan Africa's Human Development Index (HDI) average was 0.547, reflecting growth of less than one percent over the past decade and a slight decline compared to the previous year.<sup>10</sup>

Despite Africa's development gains of recent decades, it remains the case that of the 1.1 billion people who are multidimensionally poor in the world (out of a global population of 6.1 billion), roughly 534 million, or 48 percent, live in sub-Saharan Africa.<sup>11</sup> About 462 million people in the region were still living in extreme poverty in 2023, equivalent to approximately 38 percent of the population, showing a slight increase from 2022 data which estimated extreme poverty at 36 percent of the population.<sup>12</sup> The percentage of people living in extreme poverty in sub-Saharan Africa is projected to rise until at least 2030.<sup>13</sup>

2023 was a milestone, marking the midpoint for the implementation of the 2030 Agenda for Sustainable Development and the evaluation of the African Union's first 10-year implementation plan of their Agenda 2063: The Africa We Want.<sup>14</sup> The two complementary and mutually reinforcing agendas share a common framework and the objective of promoting sustainable development in all its dimensions. The reviews undertaken in 2023 demonstrated that progress towards these twin agendas has been uneven across sub-regions and within countries.

On average, the five highest-scoring Sustainable Development Goals (SDGs) in Africa in 2023 were SDG 13: Climate action (96.7), SDG 12: Responsible consumption and production (93.1), SDG 15: Life on land (67.8), SDG 14: Life below water (65.9) and SDG 8: Decent work and economic growth (63.6).<sup>15</sup> Improvements have also been made in relation to access to safely managed drinking water services but disparity between urban and

rural populations remain (SDG 6). Electrification rates increased (SDG 7), but use of clean cooking fuels remains limited and the shift to non-renewable energy is slow. Mobile network coverage increased (Africa is on average expected to meet SDG 9: Industry, innovation and infrastructure by 2030). There has been a modest decline in Africans living in urban slums (SDG 11: Sustainable cities and communities). However, other SDGs, including those most closely related to human development, are significantly behind target (see the box).

### Human Development Indicators in Africa 2023: Slow Progress in Key Areas



**3 in 4**

sub-Saharan Africans lack access to safely managed sanitation services



**53%**

continue to live without access to electricity



**52%**

lack primary healthcare



Africa has the **highest** child mortality and maternal mortality rate in the world



Despite gains, sub-Saharan Africa has the highest rates of education exclusion globally. More than **30%** of adults can not read. However, **four in every five** primary school-aged children are in school

Sources: Africa Sustainable Development Report 2023; UNCTDA 2023, 'Commodities at a glance: Special issue on access to energy in sub-Saharan Africa'; The Africa Health Agenda International Conference Commission; <https://unstats.un.org/sdgs/report/2023/Goal-03/>; <https://sheisafrica.eu/2023/09/07/literacy-in-africa-2/>.

<sup>10</sup> Latest HDI data released is for 2021-2022.

<sup>11</sup> [Global Multidimensional Poverty Index](#), OPHI.

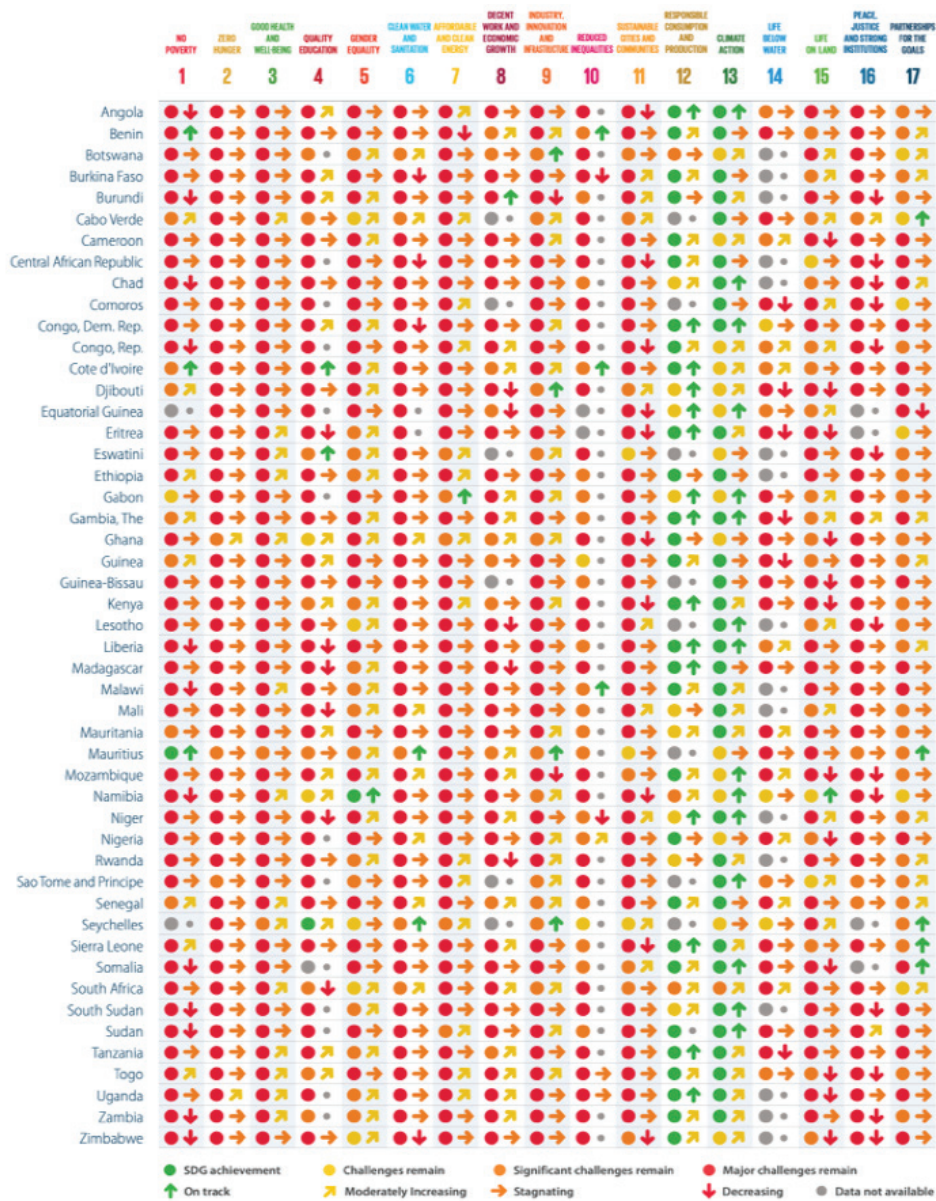
<sup>12</sup> [The World Bank in Africa](#), World Bank (2023).

<sup>13</sup> Africa Sustainable Development Report, UNDP (2023).

<sup>14</sup> Ibid.

<sup>15</sup> [Mo Ibrahim Foundation](#)

# Sustainable Development Goal progress in African countries, as per UNDP's 2023 Africa Sustainable Development Report





The economic contraction of the last few years and continuing volatility at large poses very real threats of further compromising Africa's development outcomes. While the pandemic is past, the Ukraine War shows no sign of ending in 2024 and the escalating conflict in the Middle East will bring new pressures to the global economy, and to Africa.

Despite these pressures, 2024 is a critical year for ensuring that the declines of the past few years were a dip, and not the beginning of a more decisive downward trend in development in Africa. The remainder of this paper delves into four key trends whose unfolding during the year ahead will collectively have a decisive impact on outcomes.

They are framed as:

- i. Africa's democracy at a crossroads in the "super-election year;"
- ii. guns yet to fall silent;
- iii. regional and global diplomacy: Africa's rising influence; and
- iv. new macro-level perspectives and 'accelerators' gaining ground: navigating climate change impacts, debt burden and dwindling aid

## Africa's democracy at a crossroads in the "super-election year"

Senegal is set to hold a closely contested presidential election on 24 March 2024. The election comes after President Macky Sall's failed attempt to postpone the vote until the year's end, which led to violent protests and uncertainty.<sup>16</sup> As a result of the Extraordinary Summit of ECOWAS Heads of State and Government, held on 24 February 2024, ECOWAS decided to immediately lift all economic and financial sanctions on Niger, Burkina Faso, Guinea and Mali.<sup>17</sup> This decision is seen as a gesture of goodwill and an attempt to encourage dialogue with these countries in the hope that they will reconsider their decisions to withdraw.

In what has been billed globally to be a "super-election year," in which half of the world's adult population will have the opportunity to vote, a number of potentially game-changing elections are scheduled to take place in Africa.<sup>18</sup> At the time of writing, at least 19 critical elections are scheduled, including in Ghana, Rwanda, South Africa and Tunisia, among others.<sup>19</sup> Each will bring its own risks and opportunities.

---

<sup>16</sup> [Senegal votes Sunday in a presidential election that has fired up political tensions](#), AP News.

<sup>17</sup> [ECOWAS lifts sanctions on Niger amid tensions in West Africa bloc](#), Al Jazeera.

<sup>18</sup> [2024's Wave of Elections: Referenda on What?](#), Open Society Foundations.

<sup>19</sup> A full and regularly updated list of schedule elections is available at: [Africa Elections 2024: All the upcoming votes](#), African Arguments. See also on [Africa Center](#).

## Elections scheduled for 2024 in Africa



Country	Type of election	Date
Comoros	Presidential	14 January
Mali	Presidential	04 February
Senegal	Presidential	25 February
Chad	Presidential and Legislative	06 May
South Africa	General	29 May
Mauritania	Presidential	22 June
Burkina Faso	Presidential	July
Rwanda	Presidential and Legislative	15 July
Mozambique	Presidential and Legislative	09 October
Botswana	General	October
Somaliland	Presidential	13 November
Tunisia	Presidential	24 November
Mauritius	General	30 November
Namibia	Presidential	November
Ghana	Presidential and Legislative	07 December
Algeria	Presidential	December
Guinea-Bissau	Presidential	December
Guinea	Presidential and Legislative	December
South Sudan	Presidential and Legislative	December

In addition, there are 4 legislative elections this year: Togo (Spring 2024), Madagascar (May), Malawi (May 24), and Somalia (November 30).

Source: Africa Centre for Strategic Studies



The process and outcomes of each of these elections will have profound national and regional reverberations. For some countries, seismic shifts in the political landscape may be in store. Among these, South Africa faces the tightest race since the end of apartheid in 1994, with the governing African National Congress challenged as never before.<sup>20</sup> Mozambique is likely to see a new head of state, with presidential and legislative elections set for October, however voting will take place against a backdrop of heightened political tensions, voter apathy and significant mistrust.<sup>21</sup>

The continent's normative commitment to democracy has long been articulated through the African Union, regional economic communities and national policies, and as such is enshrined in the African Charter on Democracy, Elections and Governance as well as national constitutions, among others. A track record of peaceful alternance of political power through electoral process is well established in many countries, and slowly but surely intensifying. However, the last few years have been challenging for democracy and human rights not only in Africa, but all around the globe, with Africa experiencing its own pressures across the continent. The busy electoral calendar unfolding in 2024 will do so against a growing understanding that democracy in Africa is at a crossroads.

The quality of the upcoming electoral processes themselves will be key. Electoral experiences in 2023, such as that of Africa's largest democracy, Nigeria, and the Democratic Republic of the Congo, were replete with lessons. Leading Nigerian think-tank the Centre for Democracy and Development identified four key issues that compromised integrity in Nigeria's case: election-day operational challenges, including as relates to the use of technology; violence and voter suppression; voter

behaviour (with the country experiencing the lowest turnout in its electoral history at 37 percent); and the negative influences of both money and online misinformation.<sup>22</sup> Mitigating against these types of threats to the security, quality and legitimacy of Africa's 2024 elections should be a top priority for all stakeholders.<sup>23</sup>

As has been widely commentated, the resurgence of military coups—as a form of what the African Union calls Unconstitutional Changes of Government—from 2020 to 2023 (in Burkina Faso, Chad,<sup>24</sup> Gabon, Guinea, Mali, Niger and Sudan, with attempted coups reported elsewhere) has significantly sharpened questions about the overall health of democracy in Africa. The past decade has also seen a rising trend of constitutional manipulation in some countries, in which leaders have attempted to revise their constitutions to extend power. The apparent resurgence in military coups alongside this practice (and in some cases linked to it) has raised the spectre of earlier periods in Africa's history in which disregard for constitutional order and a close involvement of the military in political life were prominent.<sup>25</sup>

Thus, the context for democracy in Africa has lately become unpredictable. It cannot be ruled out that there will be more instances of the dynamics described above during the coming year. During 2024, the after-effects of the recent military coups will continue to play out in the affected countries and regions, requiring continued engagement towards re-establishing constitutional rule, made all the more urgent in light of the "African Brexit," which refers to the withdrawal of Burkina Faso, Mali and Niger from ECOWAS.<sup>26</sup> Other leaders with designs on extending power have already shown themselves willing to use the threat of coups to tighten their hold on key institutions.<sup>27</sup>

---

<sup>20</sup> Foreign Policy article.

<sup>21</sup> Ibid.

<sup>22</sup> [Four key issues that defined Nigeria's 2023 presidential and legislative election process](#), [cddwestafrica.org](#); see also: [Nigeria: Trust and turnout define 2023 elections](#), Chatham House – International Affairs Think Tank. Similar flaws in the Democratic Republic of Congo's process were also observed, despite its overall representation as a "halting step towards embedding democracy," see: [The DRC's election was a halting step towards embedding democracy](#).

<sup>23</sup> It is to this end that UNDP together with the United Nations Department of Peacekeeping and Political Affairs, the African Union and other partners recently launched an African Election Fund. The Fund is designed as a regional capacity for electoral assistance, advancing coordinated interventions to promote resilience and peer-to-peer support that can safeguard election integrity across the continent.

<sup>24</sup> In Chad, soon after the president's death, power transferred to the late president's son outside of constitutional processes; this has been likened to a coup.

<sup>25</sup> As discussed in UNDP's recent flagship report that explores the development drivers and impacts of the military coups. UNDP (2023). [Soldiers and Citizens: Military Coups and the Need for Democratic Renewal in Africa](#), UNDP Regional Programme for Africa.

<sup>26</sup> [West Africa's 'Brexit': moment spells trouble for the region](#), Reuters.

<sup>27</sup> As has been alleged in relation to the Zambian president's public statements about potential coup risk in that country for instance, see: [Why is Zambia's president warning off non-existent coup plotters?](#) African Arguments.

Populations' frustration with government failures to deliver on socio-economic priorities is a major factor contributing to democratic backsliding and political turbulence across the continent.<sup>28</sup> Continued efforts to understand and address these factors are required. A major theme for international and regional partners during the coming year is to encourage governments to pay attention to the need to govern in the interests of all their citizens.

One important mechanism designed to coalesce influence and engagement around Africa's political transitions is the Africa Facility to Support Inclusive Transitions (AFSIT), launched by UNDP and the African Union in 2023. AFSIT will focus on providing leadership and capacity towards enabling peaceful political transitions and strengthening constitutional, democratic governance in Africa throughout 2024 and beyond.

## Guns yet to fall silent

The African Union's Roadmap of Practical Steps to Silencing the Guns in Africa by 2020 remained far from its ambitious goal by the end of 2023.<sup>30</sup> In the year ahead, there are a number of conflict hotspots at which journeys further into, or away from, insecurity will have implications for Africa's development context as a whole.

Three of these – Ethiopia, the Sahel and Sudan – appeared in the International Crisis Group's annual Ten Conflicts to Watch publication for 2024, which also finds that globally, peacemaking is in crisis.<sup>31</sup> With global attention being more squarely focused on the Israel-Gaza Crisis and Ukraine War, inclusion of these conflicts in Africa underscores the urgent need for creative solutions.

In Sudan, the violence that broke out between military factions in April 2023 has already claimed 12,000 lives, displaced eight million people and forced 19 million children out of school.<sup>32</sup> In 2024, it is critical to stabilize the situation. Without significant diplomatic efforts, 2024 may well see the conflict continue to expand, potentially leading to a de facto division of the country into territorial zones under the control of the Sudanese Armed Forces (SAF)

Supporting civic activism that strives for positive change needs to be a further priority of all stakeholders concerned with democracy in Africa. Social movements that help deepen and expand the dividends of democracy and that promote inclusivity are a hallmark of positive change. Observers increasingly welcome "radical activism" on the continent as a critical driver of progress, referring to demands for better performance from African governments, whether emanating from women, youth (including underprivileged and marginalized youth often living in Africa's rapidly expanding urban poor areas), LGBTIQ+ voices, professional associations of various sorts or civil society at large.<sup>29</sup>

### Recorded insecurity events taking place in sub-Saharan Africa increased from

**34,848**  
in 2022

↓

**38,327**  
in 2023

Conflict events resulted in over **59,000** fatalities, of which 28% occurred during communal conflict and 24% during insurgency-related conflict.

By the end of 2023, the number of displaced persons in Africa, largely due to conflict, totalled

**40.4M**

Source: ACLED database

<sup>28</sup> [2024's Wave of Elections: Referenda on What?](#) Open Society Foundations. See also: [Flawed elections and poor governance underlie Africa's backsliding](#), ISS Africa.

<sup>29</sup> See for instance: [Registers of radical activism in Africa](#), African Arguments.

<sup>30</sup> [Silencing the Guns by 2020](#), African Union (au.int).

<sup>31</sup> [10 Conflicts to Watch in 2024](#), Crisis Group.

<sup>32</sup> [Over 12,000 killed since fighting broke out in Sudan: UN-Xinhua \(news.cn\)](#), UN data points in ICG.

and the Rapid Support Forces (RSF); this would push the country “further down the path of long-term state failure.”<sup>33</sup> Calls must be heeded this year for a peace agreement that sees both parties disband or return to barracks, for foreign actors backing the two military groups (such as Egypt, Saudi Arabia and the United Arab Emirates) to transform their engagement in Sudan’s internal affairs, and for other measures such as imposing an arms embargo on all parties.<sup>34</sup>

The war in Sudan was highly destabilizing for the wider region in 2023, with displacements exacerbating pre-existing refugee crises in Chad and Ethiopia. Other bordering nations facing complex security issues, including the Central African Republic and Libya, provide a ready conduit for arms, with the notorious Wagner Group allegedly supplying the RSF with weapons through the Central African Republic.<sup>35</sup>

The risk of widening insecurity during 2024 is tangible elsewhere in the Horn of Africa. Conflicts in Somalia and South Sudan continue to rage and are unlikely to reach peaceful settlement this year. The scope for inter-state tensions to mount is also pronounced. Following its victory over Tigray opposition forces during the war of 2020–2022, the Ethiopian government is now engaged in suppressing rebellions in both the Amhara and Oromo regions including against former allies in the Tigray war.<sup>36</sup> Ethiopia’s border disputes with Sudan were again prominent during 2023 and tensions with Somalia are mounting. In late 2023, Ethiopia signalled a possible renewal of hostility with Eritrea related to its ongoing desire to secure direct access to the Red Sea.

Both parties are reportedly building up arms and seeking international alliances.<sup>37</sup> These tensions are mounting in a global context identified by the International Crisis Group whereby, “[...] in 2024, the risk that leaders move beyond quashing dissent at home or meddling abroad through proxies to actually invading neighbours is graver than it has been in years.”<sup>38</sup>

At the same time, security in the Red Sea has become, into the early weeks of 2024, a source of mounting international concern as the site of spillover from the Israel-Gaza Crisis, in particular attacks by Yemeni Houthis on passing merchant vessels and further deployments and retaliations by Western powers. Whether these dynamics serve to inflame or quell Ethiopia’s ambitions and Eritrea’s resistance during the year remains to be seen. Analysts have identified likely immediate economic consequences of the Red Sea crisis for Egypt, as maritime traffic re-routes to avoid the insecurity.<sup>39</sup> Grave implications for Africa as a whole are also to be considered, given disruptions to trade, with consequences including delays in vital food imports and the threat of major environmental pollution incidents.<sup>40</sup>

Looking across the continent to West Africa, it seems likely that deepening insecurity and conflict risks will continue to dominate attention during 2024. The crisis in the Sahel has deteriorated steadily, with recent military coups significantly compounding the region’s volatility. Guinea is the only Sahelian coup-affected state to remain committed to the African Union and ECOWAS roadmap for transition back to civilian rule. Guinea should see elections by the end of 2024; however, it is making slow progress.

Meanwhile, the Alliance of Sahel States formed in 2023 by the ruling juntas in Burkina Faso, Mali and Niger has emboldened them to explicitly resist the encouragement efforts of regional institutions to transition back to civilian rule. This security pact commits each of them to providing military assistance in the event of an attack on a member and, going further, to envisage political and economic cooperation and the creation of a constitution of a confederation of Sahelian states. The recent announcement of their intention to withdraw from ECOWAS raises the stakes still further. Yet, despite pledges of these coup leaders when coming to power that they would address insecurity linked to violent extremism in their countries, armed group activity shows every sign of escalating, posing the threat of ever greater vulnerability and suffering of citizens during the year ahead.<sup>41</sup>

<sup>33</sup> [Sudan’s Calamitous Civil War: A Chance to Draw Back from the Abyss](#), Crisis Group.

<sup>34</sup> [Sudan should avoid the mistakes that kept Angola in conflict for 27 years](#), Al Jazeera.

<sup>35</sup> [Africa: trends to watch in 2024](#), miningreview.com.

<sup>36</sup> [Conflict in Ethiopia](#), Global Conflict Tracker (cfr.org).

<sup>37</sup> [Potential “Red Sea” War between Ethiopia and Eritrea: A Three-level Analysis](#), African Arguments; [What’s at stake for Africa in 2024?](#), Chatham House – International Affairs Think Tank.

<sup>38</sup> [10 Conflicts to Watch in 2024](#), Crisis Group.

<sup>39</sup> [Egypt bears economic brunt of Houthi attacks in the Red Sea](#), The Africa Report.com.

<sup>40</sup> [Africa needs a stronger voice on resolving the Red Sea crisis](#), ISS Africa.

Other conflicts in Africa that will continue to be of concern in 2024 include those in the eastern Democratic Republic of the Congo, northern Mozambique, and parts of Cameroon and Nigeria.

At a time of ongoing armed conflicts in parts of the continent, 2024 will simultaneously see a wave of peacekeeping mission drawdowns, one of many indicators of the multilateral system being under its greatest ever duress in modern times. In 2023, Mali's military-led government demanded the withdrawal of the United Nations peacekeeping mission (MINUSMA), operational since 2013, one of the largest and most challenging operations in Africa.

Despite the military's claims of self-sufficiency, analysts raise concern that this withdrawal is likely to exacerbate the already unstable situation. MONUSCO, the longstanding United Nations peacekeeping mission in the Democratic Republic of the Congo, will also be quitting at the president's request. This sense of national actors pushing against global peacekeeping engagement has resonance at a sub-regional level, despite the vision of the African Peace and Security Architecture (APSA). Again, in the Democratic Republic of the Congo, President Félix Tshisekedi has voiced strong criticism against the East African Community (EAC) for its inability to eradicate the M23 militia throughout the past year.

This criticism peaked with his recent call for the withdrawal of EAC troops if they cannot fulfill the mission's mandate, underscoring his country's shift towards the Southern African Development Community (SADC).<sup>42</sup> The way that Africa's various armed conflicts are framed may shift and evolve at a policy level. An emphasis on 'terrorism' has a strong basis; in 2023, the Global Terrorism Index found

that sub-Saharan Africa accounted for 48 percent of global deaths from terrorism.<sup>43</sup> However, many observers question whether using a terrorism lens for informing response strategies will yield lasting solutions.<sup>44</sup>

UNDP's own work advancing development responses to violent extremism underscores how terrorism as a phenomenon flourishes where there is exclusion, human rights abuses and impunity.<sup>45</sup> The continuing evolution of the conflict landscape in Africa suggests that during 2024 new approaches and perspectives must come to the fore that accommodate but do not over-concentrate on the terrorism lens, taking into account the proliferation of regional, international and structural factors shaping conflict trajectories.

Above all, attention must be paid to the core governance and development challenges that are fuelling armed conflicts in an increasingly complex political arena; this is critical to mitigate Africa's burgeoning insecurity. Investments in achieving meaningful progress on priorities that are well documented to represent pathways to peace, such as inclusive economic opportunities, social protection infrastructure, better access to services, security sector reform and improvements to the rule of law, represent an urgent agenda for the year ahead.

### **Regional and global diplomacy: Africa's rising influence**

Increasing coherence in Africa's presence and voice on the global stage will be apparent during 2024, building on milestones seen during 2023, yet in a context of ever-sharpening geopolitical divisions and eroding multilateralism.

---

<sup>41</sup> [Rights groups report widespread war crimes across Africa's Sahel region with communities under siege](#), AP News.

<sup>42</sup> [Africa: trends to watch in 2024](#), miningreview.com.

<sup>43</sup> [Global Terrorism Index – Countries most impacted by terrorism](#), visionofhumanity.org.

<sup>44</sup> [Publications - Saferworld](#), saferworld-global.org.

<sup>45</sup> [Journey to extremism in Africa: Pathways to recruitment and disengagement](#), UNDP.

South Africa's successful move in late 2023 to bring a case against Israel for war crimes in Gaza to the International Court of Justice attracted support from Namibia as well as countries outside of Africa. It provided further testimony to the ability of African states acting alone or in concert to bring fresh perspectives and momentum to intractable international issues where stasis among traditional global powers becomes locked. Some observers noted the potential for African-led peacemaking efforts in the Ukraine War to perhaps offer more hope than other diplomatic efforts to date.<sup>46</sup>

The previous year's advances in Africa's global diplomatic presence included the expansion of the BRICS alliance to include six new members, among them Egypt and Ethiopia, under Chinese leadership. Their inclusion reflects the importance of Egypt and Ethiopia to China, as well as their importance to the BRICS group.<sup>47</sup> Also during 2023, the African Union became a G20 member, where previously Africa's only representation was South Africa.

This move was widely heralded as a step forward for continental representation in major decision-making bodies. However, efforts stalled to secure a permanent seat for Africa on the United Nations Security Council as part of wider reforms. With elections in the United States and the crisis in the Middle East likely to distract attention, this agenda is not expected to advance much further in 2024, though African leaders will continue pushing.<sup>48</sup> As will be discussed further below, an additional milestone in Africa's global presence and voice during 2023 was its newfound leadership on climate related issues.

New momentum in African diplomatic influence has taken place, as noted above, in an era of growing geopolitical competition and hostility. In some respects, this environment has been enabling, as African leaders have had the opportunity to wrest greater influence as a result of the competition at large. However, it also casts a shadow of uncertainty and threat, with the risk of divisions between world

powers contributing to divisions within and between African states. Geopolitical roil presents risk and uncertainties that will continue to blow across the continent in the coming year. For instance, clear divisions exist between African states on the Ukraine War and Israel-Gaza Crisis, with close ties and promises of support between Israel and Russia and certain African countries playing a clear role in shaping state positions.<sup>49</sup> There is a risk that these divisions may sharpen further during the year, working against convergence and leadership at the regional and continental level. The fallout of these two global conflagrations will bring additional economic pressures.

Uncertainty linked to the November elections in the United States is a further factor: depending on outcomes, a recalibration of United States engagement with Africa could be in store for 2025. Western influence on Africa in general has shown a marked decline in recent years, as was most in evidence last year in the Sahel, where perceptions as to long-standing French complicity with pernicious governance trends has been an explicit strand in coup leaders' rhetoric, and where anti-French demonstrations have taken place across the region. Divisions within the European Union are a further destabilizing factor.

The greater involvement of China, Russia and Turkey in Africa, each seeking to expand its influence in the region and offering new relationships that are not steeped in colonial history, brings both opportunities and risks for Africa across economic, security and development priorities. The brutal and destabilizing conduct of Russia's proxy military group Wagner in the Sahel has been well documented, while African leaders were reportedly disappointed by the lack of tangible investments and support for Africa at the Russia-Africa summit that took place in 2023.<sup>50</sup> On the other hand, 2024 is likely to be a busy year in China-Africa relations, with a ninth Forum on China-Africa Cooperation due to take place in Beijing and many opportunities for Chinese venture capital to invest in the continent.<sup>51</sup>

---

<sup>46</sup> [Peace, African-style](#), IPS – International Politics and Society.

<sup>47</sup> Others were Saudi Arabia, UAE, Iran and Argentina.

<sup>48</sup> [Africa: trends to watch in 2024](#), miningreview.com.

<sup>49</sup> [From Yom Kippur to the Abraham Accords: How Israel procured Africa's good graces](#), African Arguments.

<sup>50</sup> [Russia-Africa summit fails to deliver concrete results](#), Chatham House – International Affairs Think Tank.

<sup>51</sup> [What's in store for China-Africa relations in 2024?](#), African Business.

At the regional level, the prospect for African diplomacy and leadership positively impacting priorities for governance and development is mixed. Despite shortfalls in delivering on key policy frameworks such as Silencing the Guns, as discussed above, 2024 will see important continued progress towards the African Union's Vision 2063. The African Union theme for 2024 is education, thus the year should see an emphasis on further advances and gains in the reach and quality of education across the continent.

The year may also see meaningful progress towards fulfilment of the promise inherent in closer regional integration. As a result of implementation of the African Continental Free Trade Area (AfCFTA), the World Bank forecasts a potential increase to intra-regional trade of 80 percent by 2035.<sup>52</sup> Of the 47 countries that have ratified AfCFTA, 31 will join the AfCFTA Guided Trade Initiative during 2024, up from seven in 2023. More than half of African nations will use the rules of the continental free trade pact this year as the region moves closer to fully integrating into a single market.<sup>53</sup> A Pan-African Payment Settlement System will also be piloted in 2024 which will enable the secure flow of money across borders, with the potential to significantly boost African trade.

Policymakers are paying greater attention to intra-regional migration and how it can best be facilitated to support development outcomes.<sup>54</sup> Structural factors continue to drive higher levels of migration within and out of Africa, with projections that this trend will continue rising steeply during 2024. Fifty African countries improved or maintained their Africa Visa Openness Index score in 2023.<sup>55</sup> In 2023, Kenya and Rwanda joined Benin, The Gambia and Seychelles in the cluster of countries committed to offering visa-free access to all Africans. Visa

openness has improved in six of the eight regional economic communities over the past year, with ECOWAS continuing to lead the way.<sup>56</sup> Steady progress towards realizing the potential inherent in closer integration of trade and the movement of people on the continent will be offset, however, by trends that pull against regional and continental collaboration. As discussed above, in part the global context of geostrategic competition brings its own pressures.

The authority of some of Africa's major institutions is being tested, with critical divisions emerging within the Intergovernmental Authority on Development (IGAD) regarding regional policy towards Ethiopia and Sudan and within ECOWAS as it tries to uphold democracy rules in the face of military coups.

The African Union's authority was likewise profoundly challenged by the wave of military coups and subsequent positions taken by the ruling juntas, as well as its compromised ability to engage according to its principles and policy frameworks, such as its African Peace and Security Architecture, in a range of other crises and settings.

The African Union Commission chairperson has admonished states for failing to invest appropriate authority into the inter-governmental body, as will be necessary for it to avoid falling into the pitfalls of its predecessor the Organisation for African Unity (OAU). As the tension between protecting sovereignty and political interests and the collective efforts to build a powerful continental body come to the fore, some analysts see the coming year as a critical moment for the African Union in demonstrating its long-term relevance.<sup>57</sup>

---

<sup>52</sup> [Africa to Expand AfCFTA Payment-System Pilot to 31 Nations](#), Bloomberg.

<sup>53</sup> Ibid.

<sup>54</sup> [African Migration Trends to Watch in 2024](#), [africacenter.org](#).

<sup>55</sup> Ibid.

<sup>56</sup> Ibid.

<sup>57</sup> [The African Union's fight for relevance in 2024](#), ISS Africa.



## New macro-level perspectives and ‘accelerators’ gain ground: Navigating climate change impacts, debt burden and dwindling aid

Africa’s greater role in global diplomacy was especially apparent during last year in relation to the mounting climate crisis. States presented an increasingly unified voice critiquing the failures of the global North to honour and strengthen climate finance commitments made at previous world meetings, including promises to provide US\$100 billion annually.<sup>58</sup> Kenya’s hosting of the first ever Africa Climate Summit in September 2023 led to the Nairobi Declaration on Climate Change which seeks to drive green growth and climate finance solutions for Africa and the wider world.<sup>59</sup>

### Displacement in the Horn of Africa: a humanitarian crisis

A prolonged drought in the Horn of Africa resulted in an estimated

**2.7 million**

people being displaced in 2023.

The highest figures were in Somalia (**1.7 million**), followed by Ethiopia (**516,000**) and Kenya (**466,000**).

Sources: OCHA (May 2023). Horn of Africa Drought - Regional Humanitarian Overview and call to Action

The Declaration calls for expanded and more flexible concessional funding, additional credit enhancement and credit guarantee schemes to incentivize private sector participation in African climate projects and new debt relief interventions and instruments.<sup>60</sup> African leaders also played a prominent role at COP28 in November 2023 where a series of high-profile pledges were made. Africa’s leadership on climate issues is a natural corollary of its vulnerability to climate-related challenges already being experienced: drought, desertification

and increasing cyclones have led to displacement, migration and food crises. The need to scale up climate adaptation finance is a matter of profound and urgent importance that looms large over the region. Some projections anticipate economic losses of up to \$6 trillion in economic gains by 2035 due to a lack of financing for communities to reduce risks from climate hazards.<sup>61</sup>

In 2024, this growing attention paid to climate-related action needs to turn to implementation, noting a poor global track record in honouring climate financing commitments. Nearly two-thirds of climate finance commitments registered by the Organisation for Economic Co-operation and Development (OECD) between 2013 and 2021 – amounting to \$343 billion in total – have yet to be recorded as disbursed or are, according to some analyses, only tangentially relevant to climate.<sup>62</sup>

Climate adaptation and mitigation are climbing up policy agendas, however this comes at a time when, simultaneously, Africa’s weighty and complex debt burden is imposing ever-increasing pressures. 2023 was a year of protracted debt restructuring negotiations, which look set to continue into 2024 as a generation of borrowing comes to term.<sup>63</sup>

Public debt ratios in sub-Saharan Africa have increased significantly over the past decade as the result of overall economic pressures. According to an International Monetary Fund (IMF) analysis, over the past decade the median public debt to GDP ratio in sub-Saharan Africa increased by about 30 percentage points, from 28.8 percent of GDP in 2012 to 59.1 percent in 2022.<sup>64</sup> And, as local currencies depreciate against the United States dollar, debt servicing costs are becoming increasingly unaffordable, forcing governments to instigate austerity measures.<sup>65</sup>

The profile of Africa’s lenders has also evolved. In particular, debt owed to China and private creditors has rapidly risen. China is the largest single lender to African countries holding more than \$87 billion in debt (bilateral and private) across the continent.

<sup>58</sup> [Africa: trends to watch in 2024](#), miningreview.com.

<sup>59</sup> [Africa Climate Summit 2023](#), Driving Green Growth and Climate Finance Solutions for Africa and the World.

<sup>60</sup> [Africa: trends to watch in 2024](#), miningreview.com.

<sup>61</sup> [Accelerating Adaptation Finance – Africa and Global Perspectives](#), Global Center on Adaptation (gca.org).

<sup>62</sup> [Five maddening facts about climate finance](#), African Arguments.

<sup>63</sup> The EIU has flagged the financial squeeze created by excessive debt and a heavy repayment burden that most African countries will feel in 2024 as a critical issue. See EIU (2024). Africa Outlook 2024.

<sup>64</sup> IMF (2023). Regional Economic Outlook, Analytical Notes: Sub-Saharan Africa.

<sup>65</sup> [Africa: trends to watch in 2024](#), miningreview.com.

The G20 Common Framework for Debt Treatments was designed to offer states a way forward in restructuring across diverse lenders (“Paris Club,” China, the IMF and others), but few individual countries have applied for relief through this channel. The experiences during 2023 of those that have, such as Zambia, are testimony to the challenges it poses in delivering a common perspective across lenders. Some progress using the IMF-World Bank Heavily Indebted Poor Countries (HIPC) Initiative was seen with Somalia securing \$4.5 billion in debt relief at the end of 2023. Variances between lenders, and respective perceptions and divisions between these, have been identified as a prominent factor undermining the smooth functioning of this important mechanism.

More than half of climate adaptation finance to Africa comes in the form of loans, further deepening country indebtedness. In the face of the climate crisis, urgent action to provide debt relief and generate increased liquidity is needed. As underscored by Chatham House in a recent article, more effective support is required for African countries at high risk of debt distress. But this needs to be addressed jointly by the West and China and viewed in the context of Africa’s medium- to long-term investment requirements, particularly those relating to adaptation to climate change.

These macro-level and intertwined challenges are a pressing priority. During 2024, it is vital that policymakers keep creatively progressing towards realistic and forward-leaning solutions. African Union membership in the G20 provides an important space for concerted advocacy towards such a pivot in the global financial architecture, which is likely to grow throughout the year.

Even as these twin challenges are worked through, further pressures from ever-dwindling aid budgets and ever greater distractions away from Africa of traditional Western aid donors, all within a context of global economic uncertainty, is set to be a critical feature of the landscape shaping development and governance outcomes in Africa during 2024.

Meanwhile, African efforts to move beyond aid,<sup>66</sup> with a focus on private sector-led growth, among others, are long-standing and will need to grow.

### Africa’s debt: key facts

Africa’s external debt stock has risen significantly over the past decade estimated at **\$1.13 trillion** in 2023, with 25 countries at risk of being in high debt distress or already in debt distress.

The average government debt ratio in sub-Saharan Africa has doubled over a decade, **rising from 24% of GDP at the end of 2013 to 51% of GDP by 2023**. The ratio is estimated to decrease to about 46% of GDP in the next five years.

Moreover, the region’s interest payments to revenue ratio more than doubled since the 2010s and is now **four times the ratio** in advanced economies.

From 2024 to 2028, African countries will be expected to pay a total of approximately **\$363 billion** in debt service payments. In 2024, debt service payments are expected to be equivalent to **12% of GDP**.

## Conclusion: key focus areas for 2024

As the new year gets underway, as discussed above, a major priority area for policymakers will be continued attention to unlocking the dividends forecast to accrue from closer regional economic integration.

A second key focus area, linked to the discourse on climate risk mitigation and adaptation, is the range of growth opportunities for Africa around the green economy. Africa's readiness to make a substantial contribution to global decarbonization efforts by leveraging its abundant resources, including renewable energy, critical minerals, its agricultural potential and natural capital, has been increasingly amplified in global policy arenas. At its most positive, the vision sees Africa driving its own green growth and supporting global renewable energy needs. A recent UNDP analysis, the Sahel Human Development Report 2023, finds routes through which sustainable energy could regenerate Africa's Sahel region. This analysis confirms how Africa's natural endowments, if properly exploited, could transform the continent's development prospects and climate change exposure through "using the region's abundant clean energy potential to transform lives, diversify economies, give hope, and protect the planet."<sup>67</sup>

The African continent offers a range of investment opportunities for global capital to both promote decarbonization and boost local economic development. Commodities such as lithium, bauxite and "green hydrogen" are seeing a new wave of foreign investment across the continent. 2023 witnessed a rise in resource nationalism as African states moved to demand local benefits from the critical minerals required for the energy transition. Ensuring that these opportunities are harnessed in ways that deliver for the majority of citizens and do not fall into well-established extractive industry dynamics between African countries and overseas investors are critical and will require continued attention during 2024.

A third critical area to watch in 2024 is the latent potential of Africa's increasing digitalization. Africa's digital landscape is undergoing a meteoric rise, fuelled by innovation, entrepreneurship and expanding smartphone penetration.

Trade ministers are working on regulations for digital trade to boost online commerce on the continent. The African Development Bank estimates the region's digital economy will catapult to \$712 billion by 2050 from \$115 billion in 2023.<sup>68</sup> Trends, such as Africa's boom in mobile money platforms which are seen to drive financial inclusion and micro-entrepreneurship, look set to reach further with growth in e-commerce platforms and wider adoption in rural areas, according to experts.<sup>69</sup> Online shopping, fin-tech, new African apps across different sectors and functions are booming, with local and international players vying for market space.<sup>70</sup> Accompanying this dynamic growth are debates about digital rights and regulations as well as continued efforts to bridge Africa's stark digital divides – all likely to remain centre stage during the coming year.

<sup>66</sup> [Africa challenged to redefine its development agenda beyond aid](#), UNDP. [Moving Beyond Aid—Revenue Mobilization G20 Compact with Africa](#)

<sup>67</sup> [Sahel Human Development Report 2023](#), ACET.

<sup>68</sup> [African Migration Trends to Watch in 2024](#), [africacenter.org](#).

<sup>69</sup> [Digital Trends in Africa 2024: A Continent Booming Online](#), Medium.

<sup>70</sup> Ibid



Regional Programme for Africa  
UNDP Regional Service Centre for Africa

P.O. Box 60130  
Fiesta Building, Meskel Flower  
Addis Ababa, Ethiopia

[rp.africa@undp.org](mailto:rp.africa@undp.org)  
[www.undp.org/africa](http://www.undp.org/africa)

@UNDPAfrica

