Africa's Jobs Challenge

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The Development Policy Research Unit (DPRU) specialises in socio-economic research with a core focus on the areas of labour markets, poverty and inequality. The DPRU is located in the School of Economics at the University of Cape Town.

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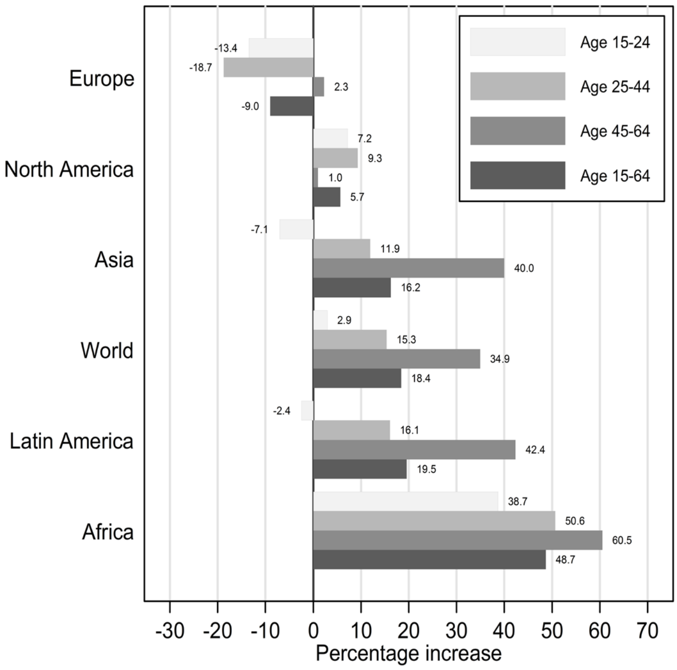
I Africa's Demographic Transition

In 2011, the world population reached another milestone of seven billion people and according to the United Nations World Population Prospects' (2011) projections, it will grow by almost 1.4 billion people by 2030.[1] In 2010, Sub-Saharan Africa (SSA) comprised 12 percent of the world's population, which is expected to increase to 16 percent by 2030 (United Nations, 2011). This is driven by average annual population growth rates of above two percent for the entire period to 2030 (albeit declining), as well as considerable declines in infant and child mortality (Lam and Leibbrandt, 2013). This transition to lower birth and death rates is known as the demographic transition and has important implications for the size of Africa's working age population and thus labour force.

The regional population growth rate projections for the period 2010-2030 are illustrated in Figure 1. The graph makes it clear that the population of the working age – defined as age 15-64 – is projected to contract in Europe and grow in single digits for North America. The growth of the global workforce will be driven by Asia, Latin America and Africa. More specifically, the region that is projected to have the fastest growing working age population is Africa. This translates into a working age population of 793 million in 2030, a 70 percent rise from the current 466 million (Table 1). To get there, it is projected that SSA will add 15.6 million people on average per year to the working age population in 2015-2020, rising to 17.2 million per year in 2020-2025, and to 19 million per year in 2025-2030. The global jobs challenge then, in regional terms, is disproportionately an African challenge.

Figure 1: Percentage increase in size of age groups in working-age population, 2010 to 2030 (Medium Variant) [2]



Source: Lam and Leibbrandt (2013) using data from ILO (2011)

[1] All projections beyond 2010 use the UN Population Division's Medium Variant projections.
[2] The growth rates for Africa include North Africa, hence the discrepancy between the working age population growth from 2010 to 2030 in Figure 1 and Table 1. Nonetheless, both Africa and SSA are expected to follow a similar trend in the growth of its working age population.

Understanding the composition of the growth in the working age population is important given that it is the rapid entry of young workers that is most likely to put pressure on the labour market. Its importance is further highlighted by the association of high rates of youth unemployment in Africa and the Middle East with ongoing political unrest across these regions.

Figure 2 plots three different measures of the youth labour force (age 15-24) for five countries across Latin America, Asia and Africa – the absolute size of the youth labour force in the left panel, the annual growth rate in the middle panel, and its contribution to the total labour force in the right panel. In all the countries, except Nigeria, there is little evidence of a 'youth bulge' seeing as there are declining growth rates of this age group compared to the 1970s as well as a falling proportion of youth in the total proportion of the labour force.

Looking at Nigeria, Africa's most populous country, the 'youth bulge' appears more pronounced. While the growth rate has fallen from its mid-1990s peak, it remains above two percent until 2030, resulting in a relatively stable share of the youth in the working-age population, compared with other African countries. Nigerian youth continue to make up over a third of the labour force until 2030, considerably higher than in other countries in this sample. These trends suggest a jobs challenge of about 545 million[3] in the next 20 years for SSA.

The fact that Africa's working age population is expected to grow so rapidly – particularly amongst the working youth cohort – serves to highlight that it is relatively not as far along in its demographic transition. This implies a great opportunity for potential growth in the region, however, also the increasing challenge of promoting growth that is job-creating.

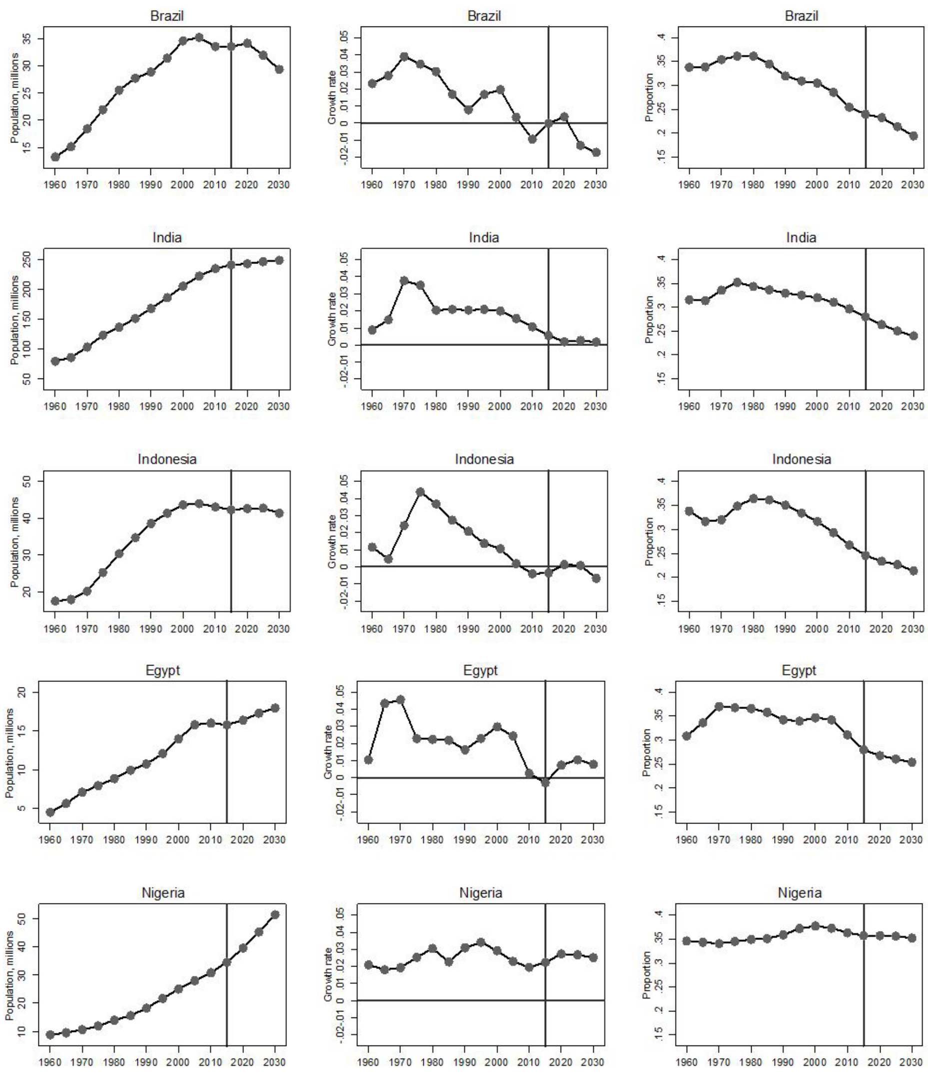
Ultimately then, the above has suggested a few important trends with respect to the future African jobs challenge. Firstly, that most of the world's working age population growth will

Table 1. Size of Working-Age Population (age 15-64) for World and Subgroups, 2010-2030, Millions

	Year			Change (m)	Change (%)	Share in world population	
	2010	**2015**	**2030**	**2010-2030**	**2010-2030**	**2010**	**2030**
A. World	4 524.8	4 804.4	5 438.0	913.2	20.2%		
B. Economic regions							
More Developed	834.9	827.7	795.2	-39.7	-4.8%	18.5%	14.6%
Less Developed:							
China	970.5	995.8	960.1	-10.5	-1.1%	21.4%	17.7%
India	789.7	861.1	1 034.3	244.6	31.0%	17.5%	19.0%
Other Less Developed	1 459.7	1 581.1	1 879.6	419.9	28.8%	32.3%	34.6%
Least Developed	470.0	538.7	768.9	298.9	63.6%	10.4%	14.1%
C. Geographic regions							
Asia	2 805.4	2 982.4	3 299.9	494.5	17.6%	62.0%	60.7%
Europe	504.8	496.3	461.2	-43.5	-8.6%	11.2%	8.5%
Latin America	385.0	413.0	468.0	83.0	21.6%	8.5%	8.6%
North America	231.3	236.1	244.8	13.5	5.8%	5.1%	4.5%
Sub-Saharan Africa	465.8	533.8	793.3	327.5	70.3%	10.3%	14.6%
D. Age groups							
Age 15-24	1 213.0	1 201.0	1 249.0	36.0	3.0%	26.8%	23.0%
Age 25-44	2 010.3	2 131.0	2 343.2	333.0	16.6%	44.4%	43.1%
Age 45-64	1 301.6	1 472.4	1 845.8	544.2	41.8%	28.8%	33.9%

Source: Lam and Leibbrandt (2013) and additional calculations by authors', using data from ILO (2011)

Figure 2. Youth Population (age 15-24) 1960-2030, size, annual growth rate, and proportion of labour force (Medium Variant)



Source: Lam and Leibbrandt (2013)

[3] Using SSA's 2010 labour force participation rate of 69 percent (calculated from Table 1 and 2), which is then multiplied by the projected 2030 working age population in SSA.

emanate from Africa. From constituting 10 percent of the global labour force in 2010, this is set to increase to 15 percent. Secondly, most of this growth will originate from young workers in Africa, who are set to stream into the labour market at an average annual rate of over two percent[4] in the 2010-2030 period.

II Africa in the Global Labour Market Today

A recent analysis of the global labour market shows that of the 3 billion individuals in the global labour force, only half of them are in wage employment (Table 2). The proportion of the labour force in wage employment compared to these that are self-employed is most stark in SSA. Of the 297 million employed individuals in SSA, only 21 percent are in wage employment. The dominant source of employment then is self-employment in the agricultural sector. In SSA, 77 percent of self-employed individuals are employed in agriculture, compared to 59 percent in non-OECD countries, and a global average of 60 percent. While more relevant to SSA, even at a global level, this figure emphasises the importance of the agricultural sector when uncovering the complexities of job creation and poverty reduction in most of the developing world. A further complication in addressing the jobs challenge is that, as with differences across the developing world in the sector of self-employment, it is likely that in the urban centres of SSA, the self-employed are predominantly in non-agricultural sectors.

SSA has a total unemployment rate of 7 percent, compared to non-OECD and global averages of 6 percent, with SSA comprising 15 percent of the non-OECD's 157 million unemployed individuals. This SSA average, however, hides much of the country variation as there are no doubt higher estimates of within-country unemployment. A notable case is South Africa's persistently high rate of unemployment currently at 25 percent as measured by the narrow definition (DPRU, 2013).

Table 3 represents the sectoral typology of the world's employment over the 2000-2011 period in which it shows that currently almost 80 percent of the world's employed are either in agriculture or services. This figure that is almost 92 percent for SSA. Over time, the gradually declining proportion of employment in agriculture in SSA is driven by the rise in employment in the services sector, with very little increase in the manufacturing and industrial sector, which merely contributes 8.5 percent to the regions' employment. This is a key observation given that wage employment and its growth is an important indicator of economic development. Evidence shows that wage employment as a share of total employment increases rapidly as a country progresses on its economic development path and conversely, that agriculture peaks at low levels of per capita national income and is almost zero for developed countries (Bhorat, 2013a).

Since labour in SSA is primarily engaged in activities related to working on land in rural areas or in some form of retail-related service, employment creation alone has little potential to move these individuals and households out of poverty. Therefore, SSA's concentration of employment outside of the industrial sector highlights the further challenge of not only creating jobs, but improving the quality of existing jobs. SSA has had a consistently high rate of vulnerable employment over the last decade, ranging between 81 percent and 77 percent, and marginally second only to South Asia (ILO, 2012). Furthermore, Table 4 shows that the number of working poor in SSA – defined as those earning less

Table 2. The Global Labour Market at a Glance, 2010 (millions)

Region	Employ. Wage	S Employ. Agric	S Employ. Non-Agric	S Employ. Total	Total Employ	Unemploy.	Labour Force
EAP	401 *(0.38)*	363 *(0.34)*	241 *(0.23)*	604 *(0.57)*	1 005 *(0.95)*	48 *(0.05)*	1 053 *(1.00)*
ECA	278 *(0.82)*	13 *(0.04)*	21 *(0.06)*	34 *(0.10)*	312 *(0.92)*	29 *(0.08)*	341 *(1.00)*
LAC	134 *(0.55)*	28 *(0.12)*	60 *(0.25)*	88 *(0.36)*	223 *(0.92)*	20 *(0.08)*	243 *(1.00)*
MENA	52 *(0.35)*	25 *(0.17)*	56 *(0.37)*	80 *(0.54)*	133 *(0.89)*	17 *(0.11)*	150 *(1.00)*
SAR	253 *(0.47)*	155 *(0.29)*	106 *(0.20)*	261 *(0.49)*	514 *(0.96)*	20 *(0.04)*	534 *(1.00)*
SSA	61 *(0.19)*	181 *(0.56)*	55 *(0.17)*	236 *(0.74)*	297 *(0.93)*	23 *(0.07)*	320 *(1.00)*
non-OECD	1 179 *(0.45)*	765 *(0.29)*	539 *(0.20)*	1 304 *(0.49)*	2 483 *(0.94)*	157 *(0.06)*	2 640 *(1.00)*
OECD	333 *(0.80)*	7 *(0.02)*	43 *(0.10)*	50 *(0.12)*	383 *(0.92)*	32 *(0.08)*	415 *(1.00)*
Total	1 512 *(0.50)*	772 *(0.25)*	581 *(0.19)*	1 354 *(0.44)*	2 866 *(0.94)*	189 *(0.06)*	3 055 *(1.00)*

Source: Bhorat (2013a), using data from World Bank (2012)
Notes:
1. The data is based on the World Bank's International Income Distribution Database (I2D2) dataset, which is a harmonised set of household and labour force surveys, drawn from a multitude of countries.
2. Shares of Regional Labour Force Estimates in parenthesis.

[4] The total percentage change of young workers in SSA (age 15-24) over the 2010-2030 period is 55 percent.

Table 3: Employment shares by sector, world and regions (%)

	Agriculture				Industry				Services			
	2000	2007	2010	2011*	2000	2007	2010	2011*	2000	2007	2010	2011*
World	40.5	35.5	34.0	34.1	20.4	22.1	22.1	22.1	39.1	42.4	43.9	43.8
Developed Economies and European Union	5.5	3.9	3.7	3.8	27.3	25.0	22.4	22.1	67.3	71.1	73.8	74.1
Central and South-Eastern Europe (non-EU) and CIS	25.8	19.8	20.6	19.9	24.7	25.6	24.4	26.3	49.6	54.6	55.1	53.8
East Asia	47.7	38.9	34.9	35.4	23.4	27.2	28.6	28.2	29.0	33.9	36.4	36.4
South-East Asia and the Pacific	49.7	44.2	42.5	43.1	16.4	18.3	18.2	18.4	33.9	37.5	39.2	38.4
South Asia	59.5	53.1	51.4	51.0	15.6	19.5	20.7	21.0	24.9	27.4	27.9	28.0
Latin America and the Caribbean	20.5	17.1	16.2	16.0	21.6	22.5	22.2	22.0	58.0	60.4	61.6	62.0
Middle East	22.4	19.1	16.9	16.7	24.4	25.8	25.7	25.7	53.2	55.1	57.4	57.6
North Africa	30.5	29.2	28.5	28.4	19.4	21.0	21.8	21.9	50.1	49.8	49.7	49.6
Sub-Saharan Africa	66.3	62.9	62.0	62.0	7.9	8.5	8.5	8.5	25.9	28.6	29.6	29.5

Source: ILO (2012)
*Notes: 1. * are preliminary estimates*

Table 4: Working poor indicators, world and regions (US$2 a day)

	Numbers of people (millions)				Share in total employment (%)			
	2000	2007	2010*	2011*	2000	2007	2010*	2011*
World	1197.6	978.3	916.6	911.5	45.9	33.1	30.2	29.5
Central and South-Eastern Europe (non-EU) and CIS	19.3	8.8	7.7	7.4	13.0	5.5	4.8	4.5
East Asia	396.0	206.7	157.1	148.9	53.2	25.6	19.1	18.0
South-East Asia and the Pacific	146.5	105.3	96.1	95.7	60.5	38.3	33.0	32.3
South Asia	415.5	425.5	421.1	421.6	81.2	70.8	68.7	67.3
Latin America and the Caribbean	31.3	25.5	23.7	23.3	15.1	10.4	9.1	8.8
Middle East	3.4	4.4	4.1	4.4	8.3	8.0	6.8	7.0
North Africa	15.4	16.7	16.8	17.3	32.7	28.4	26.5	27.2
Sub-Saharan Africa	170.2	185.3	189.9	193.0	75.7	67.0	63.2	62.4

Source: ILO (2012)
*Notes: 1. * are preliminary estimates*

than $2 a day – currently at 193 million people, constitutes almost two-thirds of the total employed and is approximately eight times the number of unemployed in the region.

The pattern of the changes in the number of the ultra-poor (those earning below US$1.25 a day) are consistent and show a distinct redistribution of the world's working poor from East Asia and SE Asia and the Pacific to South Asia and SSA – with almost a third of the world's working ultra-poor residing in SSA, up from 18 percent in 2000 (Bhorat, 2013a). Thus, while the proportion of the working poor in total employment in SSA has seen gradual improvements since 2000, the fundamental jobs challenge problem in the region remains the problem of the working poor.

Ultimately, the typology of Africa's jobs challenge is evident in the above data. In the first instance because agriculture is so central to the average African economy, policies designed to grow this sector, increase its global competitiveness and essentially serve as mechanisms for reducing the incidence of working poverty is critical. Secondly, large swathes of predominantly young people are entering Africa's fast-growing cities in search of employment. The majority end up in urban self-employment.

Making the informal sector a more sustainable form of employment, engendering linkages to the formal sector, and providing an enabling business environment for this sector to thrive is essential to meet this continent's job challenge.

Finally, growing Africa's currently miniscule wage employment base must be a key growth strategy for African governments. Expanding the light manufacturing sector is only one important job-generating growth strategy, which has worked in the high-success economies of East Asia.

III Pursuing a Jobs-Intensive Growth Strategy: A Post-2015 Remit

The UN Millennium Development Goals (MDGs) have guided international development policy over the last two and a half decades and as 2015 signals its conclusion, the focus has been shifted to the post-2015 development agenda. A recent High-Level Panel of Eminent Persons (HLP) was convened to design such an agenda, and has called for five transformative shifts. Importantly, these shifts include placing 'sustainable development' at the core as well as a focus on job-generating economic growth, which is associated with the current tenor of the economic development discourse, which promotes the idea of inclusive growth. Here the report states that "there must be a commitment to rapid, equitable growth – not growth at any cost or just short-term spurts in growth, but sustained, long-term, inclusive growth that can overcome the challenges of unemployment (especially youth unemployment), resource scarcity and – perhaps the biggest challenge of all – adaptation to climate change" (United Nations, 2013:8)

For Africa to reach its growth potential, it is important to consider both the opportunity and the challenge of the demographic dividend highlighted in the previous section. The rapid rise in the working age population will mean a new mass consumer market for goods and services on the continent, particularly in fast growing and populous countries such as Nigeria, Kenya and Ethiopia (Bhorat, 2013b). The challenge then is to expand this new consumer market though pursuing a growth and development path that is sufficiently job-creating and job-upgrading.

It is identifying the key drivers of inclusive growth that are critical to alleviating Africa's jobs challenge. While the pursuit of an inclusive growth agenda could encompass a range of interventions from a more optimal industrial policy to productivity-enhancing measures in agriculture; it must be underpinned by fundamental elements such as the adequate supply of skilled workers, support for small and medium enterprises, and investment in R&D and infrastructure (Bhorat, 2013b).

With a young and low-earning African population, savings rates remain low in most of the countries across the continent, which points to the importance of accessing foreign savings to fund local development. As another of the transformative shifts, the HLP (2013) report specifically calls for a new Global Partnership incorporating governments, civil society, and the private sectors to collectively think of innovative ways to end poverty as well as to continue external aid funding particularly to low income countries.

However, a growing and more important source of external financing is private capital flows from high- and middle-income countries as pension and mutual funds, sovereign wealth funds and private corporations look to fast-growing economies such as Angola, Mozambique, and Ghana in search of higher returns (Bhorat, 2013b). This will require African countries to develop the capacity to absorb these large foreign capital flows and use them effectively to fund economic development projects as part of an investment-lead inclusive growth strategy.

The final transformative shift relates to promoting peace and effective, open, and accountable institutions, with the view that peace and good governance are central to well-being, not an 'optional extra'. Transparent and accountable institutions are seen as necessary requirements for sustainable development, a requirement that is all the more important for Africa given its poor history of failed states. As Bhorat, 2013b highlights, eight of the fifteen countries considered as 'failing' on the Composite Resource Governance Index measure of the Revenue Watch Institute (2013) are in Africa.

There remains much work to be done in Africa on establishing predictable rules of law and stable institutions. These in turn promote a more stable macroeconomic environment and make these countries more attractive to foreign investors, enhancing the ability of these countries to optimally mobilise foreign savings.

IV Identifying the Growth Traps and Potential Opportunities in Africa

So far, much of the evidence above points to the potential of Africa's rapidly expanding working age population in spurring economic growth. The demographic dividend effect was no doubt central to the growth success of many East Asian economies in the latter half of the 1900s, with some estimates suggesting that as much of one-third of its "economic miracle" can be accounted for by the demographic dividend effect[5] (Bloom, Canning and Malaney, 2000). Equally, demographic changes have the potential to fuel economic growth in Africa, both as a source of labour and as an emerging consumer class. Viewed globally as the world's largest untapped market, some estimate African consumption expenditure will reach 1 trillion by 2020 (Hatch, Becker, and van Zyl, 2012). The East Asian experience, however, has also shown

[5] All the East Asian "Tiger" economies experienced a surge in savings and investment during their period of rapid economic growth, with the private savings rate in Taiwan (for which there is hood data on household savings) rising from about 5% in 1950 to over 20% in the late 1980s and early 1990s (Young, 1995). Since savings rates vary by age group, with saving rates highest in the 50-64 age group with the younger cohort driving consumption demand, we would expect the changing age structure in Africa to also lead to increasing private savings and thus investment.

that the demographic dividend is necessary, but not sufficient for long-term growth. One of the key elements of the East Asian success story was the supply of a highly-skilled and well-trained labour force – from 1966 to 1991, the proportion of the working age population with a secondary education or more doubled in Hong Kong and Tawain, tripled in Korea and quadrupled in Singapore (Young, 1995). A large part of the East Asian growth story was thus built around this base of highly-skilled workers. For this growth potential to be harnessed, it is key, therefore, for African economies to investigate the skills need of their individual economies in order to develop the capabilities to address them. Only then will young workers be more productively employed and contribute towards a high-growth economy, instead of being trapped in low-value adding, low-wage employment.

Since the 2007-08 financial crisis the growth performance of SSA has been strong, with a growth prediction of five percent for 2013 (World Bank, 2013). In recent years, a number of African countries have been some of the fastest-growing countries in the world, albeit in many cases, off a very low base. Although economic growth is supported by strong domestic demand, the value of commodity exports continues to be an integral component of the region's growth dynamics. Oil, metal, and other minerals exports increased from $56 billion in 2002 to $288 billion in 2012, which as a whole accounted for over two-thirds of total export growth during this period (World Bank, 2013). Therefore, the commodity-boom of the last decade has underpinned much of the region's impressive growth performance but also leaves it more vulnerable to commodity price shocks.

Economic literature has for a long-time cautioned against the developing country 'resource curse', however, more recent evidence seems to suggest that this curse may not hold for all economies and that natural resources may actually have large positive effects (Lederman and Maloney, 2008). Africa's resource abundance then holds the potential for sustained robust economic growth, however, this will only be realised through the effective management of these resources and resource revenues, which is supported by strong governance. The effective management of natural resources and the revenues they generate are essential to ensure that these resource-rich economies not only grow, but experience the kind of inclusive growth that is job-creating and promotes a diversification of the economy in a way that limits external vulnerability.

One of the fundamental traps for Africa's sustained growth is its poor infrastructure – from transport networks to basic utilities – which remains of poor quality, under-supplied and relatively more costly than in other developing regions. For example, road density per 100 square kilometres of arable land is 7.22 in Africa compared to a non-African developing country average of 127.11, electricity production measured in megawatts per million population is 386 compared to 2,475, and transportation costs in Africa are more than twice than those in the BRIC[6] countries (Beck, Maimbo, Faye and Triki, 2011). Estimates suggest that infrastructure hampers economic growth on the continent by at least two percent each year and lowers the productivity of the private sector by up to 40 percent (Kaberuka, 2013). Work by the World Bank has also pointed to the fact that infrastructure supply bottlenecks are often a function of a lack of competitiveness in these markets for various forms of infrastructure provision.

Furthermore, it is unlikely that domestic budgets along with Official Development Assistance are sufficient to close the infrastructure gap at a rapid enough pace. It is then up to African economies to tap into private international capital. As investors look to developing regions for better returns, African economies will become increasingly attractive if they are able to maintain macroeconomic and political stability, and enhance domestic institutions and the rule of law, underpinned by a deepening of their local financial markets in order to improve their ability to absorb these flows.

There are a few African economies that have already issued international sovereign bonds for the purposes of infrastructure investment, including Ghana in 2007, Senegal in 2009 and within the last year, both Zambia and Nigeria (IMF, 2011). For most of these economies, debt-to-GDP levels remain moderate and so the effect of international issuance is to change the composition of debt away from multilateral and commercial creditors. However, for all African countries except South Africa, foreign borrowing remains denominated in foreign currencies, potentially creating currency mismatches on the respective governments' balance sheets. This can be alleviated by accumulating sufficient international reserves, which are costly in and of themselves, but more generally points to the need for effective debt management to reduce external vulnerabilities when borrowing abroad.

Underpinning Africa's ability to take advantage of these growth opportunities and overcome potential growth traps is the need for strong governance and the building of effective, transparent, and accountable institutions. A stable macroeconomic environment and good management of public funds are key elements of a successful economy. It is not only issues related to democratic transition that impact on economic performance but also include those surrounding the cost of doing business, which directly impacts the potential for a thriving private sector. The World Bank's 2012 Doing Business Report data suggests that less than 40 percent of countries in SSA have put the application procedures for obtaining a construction permit online, and so access to this administrative information is subject to the physical presence of the applicant and meeting with an official (ICTSD, 2012). Reform to key areas of business policy and the rule of law can help to unleash further growth potential, through reducing the transaction cost of doing business with and through governments.

The above example also emphasises the great opportunity that Africa has to leap forward in its development path through embracing available technology, as was experienced with the mobile revolution but less so with the computer

[6] Brazil, the Russian Federation, India and China.

and internet one. According to the World Bank (2013b), only 15 percent of Africans have access to the internet, compared to a Latin American and Caribbean average of 44 percent, East Asia and Pacific at 37 percent, and a World average of 36 percent. Identifying key areas and sectors of the economy where ICT development can catalyse growth represents a critical opportunity for Africa to achieve sustainable inclusive growth.

V Conclusion

It is evident that Africa has much potential to achieve the long-term growth that is necessary for reducing inequality and alleviating poverty across the region. In order to do this, there are key pitfalls that need to be addressed, most importantly, infrastructure development and improved governance and rule of law. Through addressing these fundamental elements, African economies can be guided towards higher-value adding sectors that create sustainable employment for the millions of young people that will be entering the work force in the next two decades.

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