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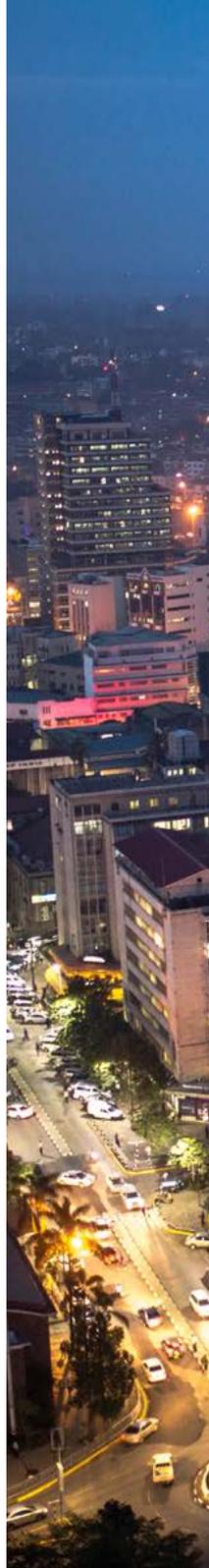
EU-AFRICA RELATIONS

STRATEGIES FOR A RENEWED PARTNERSHIP

REPORT



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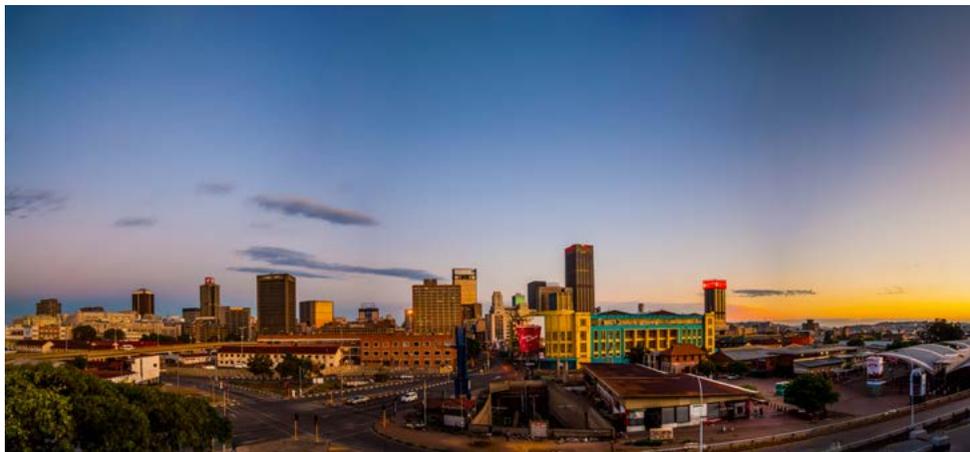
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INTRODUCTION



In November, European Union and African Union heads of states and governments will meet in Abidjan for the 5th EU-AU summit. The Joint Africa-EU Strategy (JAES) is now ten years old, and while its top-level goal of creating a partnership of equals tackling common concerns and challenges remains broadly valid, the geopolitical, development, social and economic challenges facing both continents have in many ways changed.

The key question now is how to develop a new 21st-century Africa-EU strategy, facing up to

the biggest challenges and opportunities that lie ahead.

There is no absence of plans: from the United Nations 2030 Agenda and its 17 Sustainable Development Goals (SDGs) to the AU's Agenda 2063, the JAES strategy, to the start of a discussion of post-Cotonou from 2020, European Commission proposals for a new development consensus, and many others, there are a range of goals, pillars, plans and funding.¹ Notably too, the EU's 2014-20 funding was, for the first time, set out on a pan-African

¹ 'Transforming Our World: The 2030 Agenda for Sustainable Development' (2015), United Nations; 'Agenda 2063: the Africa we want' (2015), The African Union Commission; 'The Africa-EU Strategic Partnership: a Joint Africa-EU Strategy' (2007), African Union & European Union; 'Proposal for a new European Consensus on Development Our World, our Dignity, our Future' (2016), Communication from the European Commission (COM(2016) 740 final).

basis in the Pan-Africa Programme, funded through the EU's Development Cooperation Instrument, complementing national and regional EU cooperation programmes.

In many ways the geopolitical climate is now much more challenging than even ten years ago. From the impacts of the global financial and economic crisis, security issues, and the worrying rise of populism in Europe and the United States, to climate change, demographic change and pressures on the global multilateral system, both Africa and the EU face many big challenges and crises, as well as opportunities.

High rates of growth in Africa have faltered in a number of countries in the most recent years, and while extreme rates of poverty have fallen, numbers in extreme poverty remain very high. Africa has gone from having six of the ten fastest-growing economies in the world to having only three (Ivory Coast, Senegal, Tanzania),² Africa also faces a huge demographic challenge – with half of global population growth between 2015 and 2050 expected to occur in Africa. The UN predicts that Africa could have a population of 2.4 billion by 2050, 25% of the global total, with already a very large youth population.³ This is both a challenge and an opportunity.



2 'Which are the world's fastest-growing economies?' (2016), Joe Myers - World Economic Forum.

3 'World Population Prospects – 2015 revision' (2015), United Nations.

Business voices often express substantial optimism about Africa's economic prospects as a key global market for growth in the coming decades.

The EU faces multiple pressures. The eurozone crisis absorbed substantial political attention in the last decade, while the recent UK vote to leave the EU has significantly exacerbated fears over growing support for mainly right-wing populism in a number of member states. The election of Donald Trump as US President has added to EU concerns about the robustness of the global multilateral system.

The EU's political leaders have been particularly absorbed in the last two years by the challenges of refugee and migration flows – both via Turkey and via the central Mediterranean. This remains a central political preoccupation for EU leaders and has pushed migration issues up the agenda in EU-Africa relations – from the EU side.

As African and EU leaders prepare to meet again at their November summit, what are the chances of a major new strategic approach to the Africa-EU partnership, one that steps back from short-term political priorities and takes a clear, long-term view?

In this report, we aim to contribute to that vital debate on a future EU-Africa strategy by analysing some of the key views and priorities

emerging on the EU side for Africa-EU relations. While the main focus of this report is primarily on EU member states, we also broaden this out by looking at AU and EU priorities in the survey, the results of which are outlined in the second part of the report.

In the first part of the report, we draw on a set of off-the-record interviews with key, high-level officials and diplomats across ten EU member states, as well as a small number of interviews with officials from the EU institutions, global development and human rights NGOs, a small number of AU officials, and leading international think-tanks.⁴ Many member states are still drawing up their priorities ahead of the Abidjan summit, and there are, on occasion, differences of views within member states, so the positions reflected here draw on these in-depth interviews, and are not finalised positions of each member state, although they are based on interviews with senior and top-level officials..

In the second part of the report, we present the results of a major Friends of Europe survey of 160 leading experts and opinion-formers – mainly from across the EU, but with a number from the AU. Respondents included politicians, diplomats, business, NGOs, academics, think-tanks and others.

4 The ten member states were drawn from across the EU. They are: Austria, France, Germany, Hungary, Italy, Poland, Portugal, Spain, Sweden and the UK. In total, almost 30 interviews were carried out across member states, NGOs, think tanks and EU officials. The majority of the interviews were with top-level officials.



PART ONE

**PRIORITIES FOR EU
MEMBER STATES**

The migration crisis – at least defined as a crisis by most EU member states – has sharply focused EU attention onto EU-Africa relations. At the same time, it has also led to a narrowing of focus and a shift in approach that concerns some member states (together with many NGOs and think-tank experts) but which other member states see as necessary and appropriate. Where there is consensus is on the simple fact that migration is the top political priority dominating discussions on EU-Africa relations for now.

In the context of the upcoming Africa-EU summit, EU member states are looking at a wider set of concerns and challenges, but for most of them migration and security are still dominating how they approach and prioritise

these longer-term challenges. Many are concerned at how to ensure an appropriate balance between shorter-term and longer-term challenges and strategy, so that urgent political reactions to migration challenges do not skew (or at least not significantly) longer-term strategies. There are also concerns as to how EU-Africa relations are being affected by the EU's short-term prioritisation of sharply reducing migration flows.

Here we consider first the migration and security concerns and how they are impacting on policy and on EU-Africa relations. Then we move on to look at longer-term issues and priorities for different member states, including jobs and economic development, governance, climate change, and gender.



MIGRATION AND SECURITY CHALLENGES

The global flow of refugees and migrants is one that poses challenges, opportunities and obligations for countries around the world, which the UN itself has been investigating in some depth.⁵ In the EU, the flow of refugees through Turkey to the EU that resulted in particular (though not only) from the Syrian conflict, has led to substantial political tensions and divisions within the EU, with a highly uneven distribution of refugees across different member states.⁶ At the same time, refugees and migrants have continued to come across the dangerous central Mediterranean route, mainly but not only from Libya to Italy, Spain, Malta and other EU countries.

The November 2015 Valletta summit focused in particular on this central Mediterranean migration route, bringing together EU and African leaders. Some portrayed this meeting as an effective summit, but others admit it exposed divisions within the EU and created tensions in Africa-EU relations. The Valletta summit established five pillars for tackling migration challenges – and included the issues of root causes of ‘irregular’ migration, and legal migration and mobility.⁷ There is little disagreement (in this study) that the EU’s main

focus was on returns and readmissions, as well as on borders and tackling human trafficking and smuggling.

At Valletta, some saw a striking difference between EU and African narratives about migration, which they think is still present. The EU’s returns/readmissions frame is very different to the African on migration as an opportunity and a resource (not least via remittances), leading to an emphasis from the African side on more opportunities for legal migration. How these two narratives can be brought together is seen, by some, as very problematic.

At the most recent informal summit in Malta, in early February 2017, some saw it as particularly striking how much pressure there was for short-run, quick wins with fast delivery to restrict migration flows. This is an approach that has come under sustained criticism from a large and diverse range of NGOs, not least in terms of EU-Libya relations, given the appalling detention conditions of many migrants and refugees held in Libya.⁸

There are also concerns that the EU’s Emergency Trust Fund and migration compacts

5 ‘Report of the Special Representative of the Secretary-General on Migration’ (2017), United Nations General Assembly (advance, unedited version - February).

6 There has also been a failure to relocate more than a small proportion of refugees and asylum-seekers currently in Greece and Italy despite an EU agreement to do this in September 2015.

7 ‘Valletta Summit, 11-12 November 2015 Action Plan’ (2015), European Union.

8 There are also criticisms of individual member states. The UK was criticised by its own aid watchdog (the Independent Commission for Aid Impact, 10 March 2017) for spending £10m on Libya detention camps where migrants were detained indefinitely, without adequately checking on the human rights implications of this expenditure.

are increasingly focused on migration and security concerns, such as borders, more than on development issues, and risk alienating citizens and young people in those transit and source countries that are the ETF's primary focus. NGOs and experts also express considerable worry that mainstream official development assistance (ODA) issues and projects are being subordinated to migration objectives.

From the AU side, some view the EU's stance on migration as one of creating a 'fortress Europe' in a highly defensive way; even the EU's emphasis on root causes is questioned as still promoting EU economic and migration interests. The rather simple political view that underlies many of the EU's migration policies – that stopping migration will help reduce support for populist parties and increase support for

mainstream ones – is highlighted from the African side as putting EU political dilemmas before migrants' and refugees' real needs.

While most member states see the emphasis on reducing migration flows as necessary and vital, some are concerned at how it is skewing EU development policies and funding and at the lack of balance between short-term and long-term priorities – the urgent versus the long-run. There are also concerns about the risk of, or actual, undermining of EU values in some of the specific policies and compacts that are being undertaken.

Swedish views in this study, in particular, expressed concern that more short-term, security-focused interventions should not undermine traditional development aid priorities and that, if and when ODA is used, it must

From our interviews: some priorities on security and migration

Sweden: ensure that short-term, security-focused interventions do not undermine traditional development aid priorities

Hungary and Austria: maintain strong positions on stopping migration, and resist increases in legal migration

France, UK, Portugal: ensure that the EU-Africa strategy is genuinely pan-African and not just focused on migration from north Africa

Spain and Germany: focus on a 'more for more' approach and reject 'negative conditionality' on migration

be aimed at poverty reduction and long-term goals. Sweden finds itself rather isolated in this emphasis. The mainstreaming of priority security goals into development is a worry also expressed by some policy experts and NGOs.

Some senior officials in member states – as well as think-tank experts and NGOs – consider EU leaders to be panicked, even paralysed, by the issue of migration flows. Experts talk of political fear amongst mainstream EU politicians due to the challenge from populists. This, among other problems, makes a more serious and sensible political and public conversation about longer-term demographic changes in Europe, and the need for more legal migration, almost impossible to have publicly in the current political environment.

Hungary and Austria are seen by many in this study as taking some of the strongest positions on how to stop migration, and are, in particular, not open to increases in legal migration. While a few member states recognise the need for, eventually, a more open approach to legal migration, they are reluctant to discuss that publicly while the short-term crisis is seen as so salient to political leaders and EU public opinion (and is seen as driving support for more populist parties). This current refusal to countenance more legal migration – rather than simply ensuring existing migration channels work effectively – does not help in linking short-term to longer-term means of managing migration. It also runs counter to the recent report of the

UN's special representative on global migration, which includes more legal migration as one of its recommendations.⁹

Some member states worry that the prioritisation of migration control means that political and programmatic emphasis is going to source and transit countries, including those in North Africa, the Horn of Africa and the Sahel, with less attention to countries in central and southern regions of Africa that are not seen as major parts of the migration challenge. The Joint Africa-EU Strategy (JAES) is a pan-Africa strategy but there are concerns about the balance of geographical attention as a result of the migration focus.

High-level officials in EU member states, including France, the UK, Portugal and Sweden, are particularly concerned that the pan-Africa dimension of the EU-Africa strategy must be a genuine one. While all member states recognise that it makes little strategic sense to separate off North Africa from sub-Saharan Africa in developing overarching strategy, there are different emphases – both because of migration, and for other reasons. In some member states, including Germany, the idea of creating a 'buffer zone' from the Horn to West Africa is heard, something some experts and NGOs warn against both morally and practically.

Some central and eastern European member states' officials particularly emphasise the European Neighbourhood Policy and their wish

9 'Report of the Special Representative of the Secretary-General on Migration' (2017) United Nations General Assembly (advance, unedited version - February)

to retain the importance of the ENP for North Africa. This is likely to spill over into discussions of the post-Cotonou strategy too, where current discussions suggest having a separate pan-African pillar as part of a new three-pillar framework (Africa, Caribbean, Pacific). This three-pillar approach appears to be positively received by many but not all EU member states.

There are also differences of view about conditionality, especially in the migration context. Some member states are concerned about negative conditionality - Austria, for example, supports a tougher 'less for less' approach, while in Spain and Germany negative conditionality is seen by some as potentially less desirable or even damaging - or at least that it requires a 'more for more' approach.

Some are concerned that the EU, in trying to work with a number of African countries on tackling migration and security issues, may have some short-term results but risks ultimately exacerbating the challenges. If the EU is seen to be working with authoritarian regimes, and with repressive security forces, this not only undermines the EU's reputation, values and interests, it also could be counter-productive too in alienating such countries' populations, not least their young people, and so risks creating more drivers of migration. The more the EU attempts to tackle the migration challenge through bilateral deals with different countries - after agreeing a general approach at a summit - the more the AU side is likely to periodically suggest the EU is pursuing a 'divide and rule' approach.



SOME COMMON SECURITY CONCERNS

At the same time, there are common concerns and cooperation between the EU and AU over some of the most pressing security challenges. The threat of growing radicalisation in areas that stretch in particular from the Horn to the Sahel, and conflicts with jihadi insurgent groups, have moved up the political agenda. France, with its strong links to West Africa and its intervention in Mali, started to develop its strategic thinking substantially in the last five years.

While some comment that France's prioritisation of the security threats in the Sahel was not initially strongly supported by Germany, they now consider Berlin to be fully on-board, as terrorist attacks and threats have grown in Europe in the last two years. Mechanisms such as the Sahel G5 and Dakar International Peace and Security Forum provide models of how ad hoc structures can help drive political dialogue and coordination forward.

Promoting peace and security is one of the main pillars of the JAES. The African Peace Facility (rooted in the Cotonou agreement) has provided EU funds through the AU and Regional Economic Communities (RECs) towards peace and security efforts since 2004. However, some member states suggest there are divisions within the EU on the value and impact of some of these funds, particularly in the most intractable areas and regions of conflict. There is a suggestion of donor fatigue – something that think-tank experts suggest the AU is well aware of. A number of member states also

refer to the need for greater AU ownership of peace and security strategies, not least through greater financial contributions from the AU side.

Others consider that strategies for bringing fragile states towards sustained stability are still very hard to make effective. When conflicts are resolved or narrowed, the vital importance of rapidly bringing back effective governance, public services and economic prospects are a concern expressed by many. Climate change as a significant risk multiplier for conflict is a major concern for experts but rarely mentioned by member states. At the same time, there is substantial consensus on the need for growth and stability to be inclusive, to avoid and to

From our interviews: member state priorities for the Africa-EU summit

Migration

Job creation

Demography

Private sector growth

Governance

Security

tackle marginalisation both of social groups and of remote or conflict-affected territories.

Overall, the current EU political prioritisation, and sense of urgency, over tackling migration flows is the most important factor setting both the tone and content of current AU-EU relations. Some external experts consider that there has been an increased emphasis on EU interests in policy dialogue over the past years, with a sense that on migration Europe seems to prioritise its own needs over those of Africa. Others suggest that EU policy priorities are being dominated by interior and home affairs ministers, with foreign and development ministers being forced to play catch-up.

At the same time, in looking forward to the Abidjan summit, EU member states are mostly well aware of the need to take a strategic look forward, to consider longer-term issues, and to continue to develop a stronger, strategic AU-EU relationship. A number of member states – Portugal, France, the UK and others – are concerned that if migration, counter-terrorism and security become the sole or dominant topic at the summit, the tone will be problematic and the outcomes potentially less than constructive.

The varied priorities of the member states ahead of the summit are discussed next.



PRIORITIES AHEAD OF THE AU-EU SUMMIT

The suggestion that the summit should focus on young people, which has circulated for some time, is widely and positively received across member states. Youth as the overarching focus is seen as helpful and should enable a constructive, coherent framework of priorities and strategy to be developed under that heading.

Member states have not yet, in most cases, finalised their priorities and approach for the summit – and some find the processes so far within the EU institutions less than clear. There is also lack of clarity as to how the future AU-EU strategy discussions in the months running up to the summit will interact with discussions on post-Cotonou.

Most EU member states and experts interviewed for this study are looking for a fairly comprehensive strategic approach rather than a focus onto a small number of key areas as a way to catalyse a higher-impact strategy for the coming years. This is not a new debate, between a focused and a comprehensive strategy, but given the interconnections between key priority areas, there seems to be little appetite for a radical narrowing-down.

Germany, in particular, is putting a lot of work into its various strategies and proposals for future relations with Africa, both from its position as chair of the G20 (with the G20 summit in July

and a German-initiated conference on Africa in early June) and through the EU. It is calling for a new partnership or compact with Africa, and has also drawn up, via its development ministry, proposals for a ‘Marshall Plan for Africa’.¹⁰

France and Germany, from our interviews, share a notably similar top-level language that the two continents inevitably have a shared fate and must work together on the future strategic challenges. But Germany has in many ways a much stronger emphasis – in the short and long term – on controlling migration as its top priority. At the same time, Germany places substantial emphasis on ‘root causes’ of migration, which underpins its longer-term approach in particular.

12-14 million

Potential number of new jobs needed in Africa each year, based on UN estimates for Africa’s future population growth

¹⁰ ‘Africa and Europe – A new partnership for development, peace and a better future: cornerstones of a Marshall Plan with Africa’ (2017), Federal Ministry for Economic Cooperation and Development, (BMZ) Germany.

If the summit focus is on youth, some suggest that a serious effort should be made to include youth representatives at the summit – if possible in a more than simply tokenistic way. There is some concern that the AU is not a big supporter of including civil society in summits, and also concern at how to identify appropriate youth networks in both continents. The latter is not a challenge that should be hard to surmount – both business and other civil society interlocutors have good networks of highly talented young entrepreneurs, activists, professionals and more.

DEMOGRAPHICS, JOBS AND GROWTH

The demographic challenge in the coming years, as Africa's population continues to grow, is seen as a key priority for strategic policy-making by many member states, according to our interviewees, including Germany, France, Italy, Portugal, Spain and the UK. The emphasis on population growth in Africa is not matched, though, by any similar focus on the ageing demographics of the EU.

In Germany in particular, the demographic challenge is seen as one that must be tackled as a priority so that the current migration flows to Europe do not continue and become substantially larger into the longer term of the next ten to twenty years. The UK's top Africa challenges, as identified by this study, include demographics, migration, security and governance but the UK would rather see a focus onto the economy and jobs than too much

focus directly on the migration challenge at the summit, it appears. Jobs and economic development also come to the fore in France's policy thinking with much more emphasis on the role of the private sector than on traditional ODA (seen as complementary and secondary) – an approach similar in many ways to that of the UK.

Given UN estimates for Africa's future population growth, 12-14 million new jobs a year may be needed in Africa for the large and growing potential workforce in the coming decades. A number of member states emphasised jobs and job creation as one key priority for the summit in interviews – these include Germany, France, Poland, Portugal, Spain and the UK. Inevitably that means an emphasis on the most effective routes to economic development, especially in ways that create jobs across society, that are sustainable and inclusive, and that create competitive markets and businesses.

Germany emphasises the need for a major new strategic approach to boosting industrialisation in Africa in the coming two decades and beyond. But development policies focused on industrialisation are not new, so the key questions will be on the nature of the strategy and how to create much greater and strategic impact and success. A strategic approach based on promoting industrialisation is one that could be welcomed by the AU.

Germany's approach, in interviews for this study, emphasises the need for a shift to higher value-added economic activity, away from economies still dominated by agriculture and raw materials. Consideration of how best to encourage both

European and other external businesses to invest in Africa and how to develop African businesses are also seen as important.

Other ideas include new or wider mechanisms for providing risk guarantees and insurance for companies investing into, and trading with, African countries. More comprehensive ideas are being developed too, in the G20 context, for specific country partnerships, where all the multilateral development banks (MDBs) could be brought in – with the idea that such specific partnerships could, if successful, act as role models as well as drivers of growth. One risk here is of a focus on the more successful countries and economies rather than on those in more difficult circumstances.

Furthermore, some EU business perspectives suggest that the flow of finance into African countries from MDBs and development agencies too often goes through governments and big corporations rather than finding its way to the entrepreneurial ‘ecosystem’ of talented entrepreneurs, new investors, SMEs and others. This is seen as a major issue for business. Greater inclusion of business views in EU-AU summit preparations would also be welcomed.

According to this German emphasis on industrialisation, stronger job-creating development across Africa will ensure that a burgeoning youth population will stay in Africa, rather than move to Europe. This, for some in Germany, is the top priority rather than business prospects for German and

As more African countries become middle-income economies, health issues are likely to change too, with obesity problems alongside continuing poverty and malnutrition.

EU firms. Many other member states see it somewhat differently. Creating good economic and business opportunities are seen as being mutually beneficial for EU and African companies. However, with German exports to Africa accounting for about two per cent of its global exports, this may explain the relatively low emphasis on economic opportunities, according to some German views.¹¹

11 ‘Country trade view: Germany’ (2015), ING.

While Hungary puts migration control as its top priority, it also puts some priority on international trade prospects including management of natural resources, as well as on wider economic and development cooperation to tackle root causes of migration. For the UK, developing Africa's private sector is vital, and ways to facilitate private sector investment need more attention. Job creation is also seen as a route to prevent and inhibit radicalisation.

In Portugal, economic and human development and trade are seen as key drivers according to our interviews. Portugal tends to emphasise the more positive outlook in terms of positive and complementary trade, economic, skills development and other future EU-Africa relations. France also emphasises developing African economies through prioritising the private sector – from encouraging investment, to improving legal frameworks, to education and training in the right skills. France sees ODA as more of a back-up, complementary tool, especially for the most vulnerable groups and countries.

There appears to be a broad similarity in approach across member states, from our interviews, including Germany, France and the UK, in the need to look for a renewed and more imaginative strategic dynamic focused on how to promote private sector and economic development – in industry, agriculture, and in higher value-added areas like research.

What is much less often mentioned in the course of this study is the role for public-private partnerships, the role of the public sector,

the importance of sustainable agriculture, and the role of more traditional development interventions. These issues are not entirely absent but much less often referred to. One area where there is a lot of emphasis is on creating inclusive growth, and growth that entails higher productivity and therefore higher wages. Growth that does not provide job opportunities for many or that does not reduce poverty is not going to solve Africa's key challenges.

Sweden's views, with an emphasis on keeping ODA's focus on tackling poverty, on gender, and on governance are perhaps the biggest contrast to this private-sector emphasis and jobs prioritisation approach. But the German Marshall Plan also has a strong traditional development component, with its three pillars covering economic development and trade, peace and security, and governance and the rule of law.

The balance across German proposals is welcomed by many, though some suggest the approach is a bit too traditional. Yet others are concerned that Germany is most geographically concerned with migration source and transit countries rather than Africa as a whole, emphasising the need for a security belt from Mauritania to Somalia. Nonetheless, German job creation proposals appear to take a clear pan-African approach.

Most member states still recognise and mention the vital importance of education and training (the right skills for industrial modernisation, including digital skills) and

the crucial need for a range of traditional and modern infrastructure development at national, regional and continental level; some mention health issues, and many refer to governance. There is occasional reference to the need to align EU strategies with both the UN 2030 Sustainable Development Agenda and SDGs, and with the AU's Agenda 2063 strategic plan (the latter especially by Germany) but the main concerns repeatedly come back to migration, demographics, jobs, the role of the private sector and security.

The emphasis on job creation per se is one that may be widely welcomed – while there will be a range of views, as always, on how best to promote job-creating economic development. However, external experts and NGOs consider that if the EU's aim is to block or strongly control migration over the coming decades from Africa to Europe, it will not succeed. It is well known that as incomes rise, mobility and migration increase rather than decrease. Most migration within Africa is already within regions and then within Africa but youth aspirations to travel and to work in more developed countries and in Europe are unlikely to disappear.

A few member states, such as Portugal, appear to recognise this likelihood, and also the potential benefit to the EU of these aspirations, given the EU's own demographics. But most, in the current political climate, do not.

It is notable from the business point of view that there is much more optimism about Africa's growth prospects and growth potential

than is heard from EU member states. The business perspective emphasises Africa's growing population and the likelihood of Africa becoming both a major – even *the* major – new global export market and the source of much higher exports from Africa to the rest of the world. Some business voices, as well as emphasising big market opportunities, also refer to the importance of the co-development of technology, skills, partnership with African firms and the need to interact in a collaborative and developmental way.

More successful and entrepreneurial African companies also need encouragement to access EU markets from a foreign direct investment point of view and not just for exports – something where again business optimism contrasts with little such perspective from more official viewpoints. Such a two-way perspective also points the way to a genuine EU-AU strategic policy on creating enabling environments for EU and AU businesses in both Africa and Europe.

URBAN-RURAL ISSUES

One notable absence in this study's in-depth interviews is any particular attention paid to the major issue of urbanisation, urban slums, and urban-countryside/agricultural links. How to create urban infrastructure and economies that are sustainable and attractive, how to create rural-urban links that ensure rural areas can develop strong, high productivity sustainable agricultural sectors, and how to

create both urban and rural jobs, are central questions to any future Africa strategy.¹² But these issues appear to be second- or third-level for member states at the moment rather than an area of focus for innovative prioritisation. Africa's growing population is expected to be increasingly urban – currently at 40% living in urban areas, the UN estimates this will reach 50% by mid-century.¹³

Yet if the upcoming summit and new strategy is going to focus on youth, then urban development and urban-rural links are surely a major issue. Experts suggest African food systems will need to change dramatically in the next ten years to supply growing urban centres and the growing population. Young people do not see agricultural jobs as attractive – and imaginative rural strategies surely need to be part of a major jobs plan (according to one study, Africa has 60% of the world's uncultivated, arable land).¹⁴

As more African countries become middle-income economies, health issues are likely to change too. Some countries such as Indonesia and Mexico have seen a rapid development of obesity problems, alongside continuing poverty and malnutrition, meaning stunted growth in children is still a problem – and even obesity and stunted growth together. Public-

private partnerships on nutrition, urban food supply, rural development and more could be part of a more innovative strategic approach, complementing the emphasis on private sector-driven growth and industrialisation.¹⁵ A recent report by the UN's Food and Agriculture Organization has emphasised that a 'business-as-usual' approach will not work in the face of 21st-century trends and challenges.¹⁶

There is also a risk that a policy and funding emphasis on the private sector, migration and security will reduce aid to traditional ODA poverty, health and education goals in ways that could undermine rather than support the broader sustainable economic development goals. Policy coherence should, in theory, ensure this does not happen, but political agendas can, as ever, cut across coherence.

GENDER AS A PRIORITY

There are a range of views across member states on how much and in what ways to prioritise gender equality and rights within the AU-EU strategy. The issue of reproductive and sexual health rights is seen as potentially sensitive in some EU as well as in some African countries, even if not in the majority.

12 Brooking's recent report emphasises urbanisation as one of its top six priorities for Africa: 'Foresight Africa : Top Priorities for the Continent in 2017' (2017), Amadou Sy (ed), Africa Growth Initiative at Brookings.

13 'World Urbanization Prospects - highlights' (2014), United Nations.

14 'Lions on the move: The progress and potential of African economies' (2010), McKinsey Global Institute report.

15 See, for example, the recent report of the international intergovernmental body 'Scaling Up Nutrition': "SUN Movement: Strategy and Roadmap 2016-2020"

16 'The Future of Food and Agriculture: Trends and Challenges' (2017) UN Food and Agriculture Organisation



An emphasis on women and girls, with a summit focused on youth, is seen as particularly important in our study by France, Italy, Portugal, Sweden, Spain and the UK. There appear to be a range of views in Germany, with the German Chancellor herself emphasising gender as part of the G20 priorities but with the specific German focus on jobs as the top priority sometimes appearing to place gender issues much further down the list. Yet if prioritising jobs is seen as creating work for young men who might otherwise migrate this seems a somewhat reductionist approach to the complex goal of creating cohesive, inclusive economies and societies.

From a business perspective, the existence of highly talented female entrepreneurs and professionals is seen as one key positive feature in the business environment in a number of countries, and one central dimension in developing Africa's private sector and competitiveness. This sort of positive, dynamic outlook is more often absent from the current EU political and diplomatic perspective.

In some of Africa's poorest countries, including the Sahel, high fertility rates and poverty go hand in hand. EU member states see fertility rights, girls' education and women's rights as key to tackling poverty and limiting population

growth. But there is a sense that these issues can be very sensitive culturally and politically in some African countries. There are also concerns expressed by some EU member states that within the EU some are reluctant to prioritise these issues, with Malta and Poland often being mentioned – though others see this as a problem that has lessened or is not present. There are also concerns as to how spending cuts in this area (reproductive rights) by the new US administration may have an impact.

More widely, demographic issues are seen as too little touched on by both African and EU politicians, and the view is commonly heard that political sensitivities should not be allowed to undermine a constructive, genuinely two-way dialogue on demographic challenges and opportunities on both sides.

GOVERNANCE, DEMOCRACY AND HUMAN RIGHTS

The importance of stable and democratic governance is widely recognised. It is not mentioned as a top priority by all though. The need for fully democratic political elections and transitions, rule of law, anti-corruption measures and free media are all seen as vital both in value terms and in ensuring a stable and inclusive political, social and economic environment. There is quite a lot of emphasis from different member states on political and social inclusion – both as a good in itself but also as something necessary from the migration point of view, so that citizens of a country feel a part of the society with a positive future outlook.

Member states that particularly emphasise governance in our study include Sweden – where democracy and human rights issues are particularly underlined. For the UK, the challenge of creating and maintaining good governance is seen as a chronic rather than acute problem. Where some African countries have seen smooth transitions of power after elections, others have seen contested transitions, incumbents attempting to change constitutions or coup attempts. Many refer to the successful Economic Community of West African States (ECOWAS) intervention in the recent Gambian transition as a very positive example. For Italy, this was a positive outcome but it also highlights the importance of reacting earlier and more proactive, preventive diplomacy.

Spanish views emphasise the need to keep focusing on governance issues since these interventions often take time, but ultimately lead to change. For Spain, there is already a range of appropriate instruments, but the key is to ensure they are implemented strongly. This is a point that some civil society commentators agree with – the need for the EU to help strengthen AU states on governance, especially domestic accountability, rather than develop new policies. The need for consistency is also emphasised – with a concern that the EU does not always respond in the same way to similar governance and rights issues in different countries.

Governance is seen as a very important challenge in Germany's 'Marshall Plan' proposal and is one of its three main pillars. However, there appears to be a range of views in Germany as to how much prioritisation to give to

governance. For some, it is the most important challenge, while for others ensuring there is an effective stable business environment, including rule of law, gets mentioned and prioritised more than wider governance questions.

France too emphasises the business environment, but also the importance of democracy, gender rights, and the people and countries of Africa developing their own institutional and democratic structures. Some experts point to a split within France in recent years, with the Elysée and foreign ministry emphasising governance while the defence ministry has emphasised security, especially in the Sahel. However, with many of those security

issues strongly linked to eroded governance systems, the two need not be incompatible. How France's strategy may change after its May elections is, as yet, unclear.

For Poland, it appears that sustainability of governance is an important issue together with some concerns that in the most recent years there has been a tendency for the AU and EU to drift apart somewhat in terms of attitudes to human rights. Others, among both member states and human rights NGOs, refer to a recurring debate about rights as universal or western, suggesting the issue needs addressing more directly – with the view expressed that both EU and AU need some 'house-cleaning'.



For some, like Austria, the International Criminal Court remains important. Yet the ICC is seen by some as still a sensitive topic, and made more difficult by the EU's own short-term prioritisation of migration, and the inconsistencies in terms of values that are seen as going with that (such as its recent increased interaction with Sudan).

From a business point of view, corruption is emphasised as a major – or even the main – issue that is problematic. Some member states recognise this while others suggest that, though corruption needs tackling, an EU tone of lecturing on corruption and human rights can be unhelpful.

Some human rights NGOs consider the civil society dialogue positive but too disconnected from other parts of the JAES and from decision-making. Overall, the impression on human rights that comes over from the various points of view expressed for this study is the need for a fresh, honest discussion about how and on what the EU and AU can best work together, in partnership, on human rights.

CLIMATE CHANGE

Climate change issues are highlighted by some but come up rather less than might be anticipated given the existing and inevitably growing impact of climate change on many African countries. Since climate trends, like demographic ones, are long-term in nature and, even at the most optimistic estimates, are going to get substantially worse, and since climate is

a risk multiplier for conflict among other issues, this relative lack of emphasis is surprising.

EU member states that particularly prioritise climate change in the AU-EU context in this study include Sweden, where it is a major priority across the board. Climate change impacts, and sustainable energy, are also seen as a priority in Germany's G20 strategy and its plans for an African partnership, and in Germany's Marshall Plan for Africa (though not as a top priority), but climate change is much less emphasised in Germany's jobs and industrialisation approach (outlined above). For the G20, Germany is emphasising resilience and sustainability as two of its three top themes (the third being 'assuming responsibility'). Investing in intelligent, climate-resilient energy is seen as a key topic to develop and focus on.

Other states that emphasise climate change to some extent (in the context of this study) include Austria, France, Poland and Portugal. Business voices do refer more readily to climate change and creating sustainable energy, climate-related businesses and infrastructure and in a more optimistic, focused way – something that needs to be factored in more to governmental thinking.

Given that a number of fragile states from the Middle East to the Horn of Africa, the Sahel and West Africa are highly climate-vulnerable, and given the EU's security and migration concerns in those states, this apparent lack of emphasis on climate change as a priority both in its own right and as something that interacts in a powerful way with other challenges and priority issues is worrying.



Experts stress that climate change is seen to be exacerbating the reasons why people move – from conflict to famine to personal security. More broadly, some experts consider there is a need for a much more strategic approach to building climate resilience and governance in a long-term way, bringing together trade, aid, climate finance and more understanding of how climate risks are and will impact in the coming years and decades.

There is also substantial concern that many aid programmes are being repackaged as climate adaptation and mitigation programmes without any real increase in, or innovative approach to, climate investments for development. Strategic and large scale investments in resilience,

mitigation and adaptation have long lead times, so neglect of these issues and investments now is also of concern.

If the AU-EU strategy, looking to the future, is going to focus on jobs, industrialisation and youth as some of its key priorities, then climate change needs to be factored in more, and in more innovative ways from the start, rather than relegated to being a second- or third-tier issue.

PARTNERSHIP, INFLUENCE AND TONE

There is little disagreement across EU member states that the EU and AU and their two continents have strong common interests and must work together and continue to build their strategic partnership as equals. Having said that, there is a notable absence of references to common global challenges beyond Africa in our study (apart from an occasional reference to defending the multilateral global institutions) nor any idea that EU challenges, such as unemployment, ageing or its own climate resilience are relevant to the EU-AU partnership.

There is considerable, repeated emphasis from the EU side on the need for greater African ownership of programmes and goals. There is also an emphasis by some, including in Germany, that EU-AU strategies have to sit within and work with the AU's own 2063 programme.

From the AU side, there is still some scepticism that the AU-EU partnership is equal, and some comment strongly on the neo-colonial and/or patronising approach the EU can take. At the same time, there is recognition that the AU does need to increase its own financial resources, and to take greater ownership of implementing programmes and priorities.

The EU political prioritisation of the migration issue means that the context of EU-AU relations has changed in many ways since the

last summit in 2014. This can lead – some EU member states suggest – to an impatient tone on the part of some EU states, and equally some irritation and criticism from the AU side. While some member states suggest critical voices are mainly in the NGO community and just a few African countries, others express wider concerns that the migration focus and compromises do raise real challenges to the EU's own image and reputation (in terms of its own values, human rights and its approach to partnership). UN institutions have also expressed concern and criticisms of some of the EU's policy approaches.¹⁷

It is also suggested that the EU's approach has created tensions in the EU-AU relationship, which are well known by all. Some expert voices warn of a much more Eurocentric and self-interested tone and approach by the EU in the most recent years, in ways that certainly do not reflect the spirit or goals of the EU's own new global strategy.

A number of EU member states emphasise the importance of a positive, constructive approach and tone – in EU-AU relations and at summits and meetings. But others suggest that this is a moment where some 'honest talking' is needed on both sides – not only on migration issues but on the inter-related complex of economic development and governance issues. Honest debate can go with positive,

17 See, for example, the Office of the United Nations High Commissioner for Human Rights, sub-committee on the prevention of torture, statement calling a new EU recommendation on migrant return procedures "a slippery slope" (9 March 2017, Geneva).

constructive approaches – but the risk here appears to be of some EU interlocutors seen as hectoring or complaining, mainly driven by migration anxieties but also by other concerns and frustrations.

The longer-term focus on youth, jobs and development may help the EU-AU summit avoid these potential pitfalls, but while EU longer-term priorities are driven, as in the short term, by stopping migration, then the challenges are likely to remain. From the AU side, there are concerns that the AU-EU partnership remains far from being a partnership of equals, and that summit agreements – and rhetoric – are often rapidly supplanted by the EU making bilateral deals with individual countries that do not reflect summit priorities. Both sides appear to wish for a more honest dialogue although set-piece summits are not necessarily the best forum to achieve that.

It is notable in this study that EU member states refer rather infrequently to African views and priorities in setting out their own desired priorities for the EU-AU strategy. Some do refer to the AU's 2063 Agenda and see the need to put EU programmes in the context of that agenda, something Germany emphasises with respect to its proposed Marshall plan. On the AU side, this rather one-sided state of EU member state policy development is also noted and regretted – more attention to AU thinking and inputs, and more dialogue, would be seen as more positive.

Some NGO voices suggest that the EU is losing influence and leverage by compromising its own values in some of its migration policies and compacts. Some AU actors refer to hypocrisy in comparing some of the EU's migration policy actions with its rhetoric on human rights and values. Some NGO voices also suggest some African actors, in some states, see the EU's



short-term concerns on migration as something to exploit or take advantage of.

A number of EU member states do fairly frequently, in our study, acknowledge that the AU side finds the EU policy focus, tone and approach problematic to a greater or lesser degree in the last couple of years.

Member states mostly reject the charge of loss of influence, seeing the long-term partnership as one that continues to be of substantial weight. Many other significant actors, including China, Brazil, Turkey, the Gulf states and others, have investments, interests and cooperative deals with African countries, and deals that can be less predicated on conditionality of various types. But the EU side does not see these changes as particularly undermining EU influence. Some member states, such as Portugal, think the EU

needs to recognise more that it is not the 'only game in town'.

A number of experts suggest the EU should be looking more at trilateral cooperation, with suggestions ranging from working more with countries like Canada to working with China, not least on low-carbon and sustainable energy technology and investment. Cooperation with the US is seen as important too, but is also now more under question for many given the apparent priorities of the new administration.

Overall, there remain a number of challenges of tone, rhetoric, and substance in building a genuinely equal and strategic partnership. Given that there are frustrations on both sides over the development of the AU-EU partnership, this looks like an important moment for some genuine joint reflection on these issues.



BREXIT AND AFRICA

The UK has triggered Article 50 of the EU Treaty to start Brexit talks. It will leave the EU in March 2019. There are a number of concerns across EU member states as to how Brexit might impact on EU-AU strategy, policy approaches and geographical focus.

The UK and France are seen by most (in this study) as the two member states with the widest reach and diplomatic networks in Africa, not least given their colonial history. Some express concern that, given the different geographical focus of France (West Africa) and the UK (Eastern Africa), Brexit could lead to more of an emphasis on West Africa. Others dispute this, not least given German and other concerns about migration, stability and security from the Horn to the Sahel – and given France's own security concerns.

France has its own concerns over Brexit in the Africa context. In particular, France sees its current policy approach as fairly similar to the UK's, including in its emphasis on a pan-African, broad economic and development approach that reflects African interests. There could be a risk after Brexit that there will be more of a push from other member states, including

Germany, onto a narrower, migration-related set of countries and a rather different approach. Equally, others comment that depending on the results of the French elections, French policy too could change significantly. But the EU institutions, some think, are likely to anchor a broader approach rather than a narrowing after Brexit.

Development experts have also expressed worries about the impact of Brexit in trade terms, and whether the UK leaving existing EU-third country trade deals could raise trade barriers for some of the poorest countries around the world. They call for the UK to ensure this does not happen.¹⁸

The shape of the future EU-UK relationship is far from clear, not least on the foreign policy and development side. A number of member states express the hope that there will continue to be substantial cooperation, at least on the ground, in different African countries. There is a clear awareness that Brexit will also reduce the funding available to the EU overall, including in its development programmes.

18 'Post-Brexit trade policy and development: current developments; new directions?' (2017) Maximiliano Mendez-Parra, Dirk Willem te Velde and Jane Kennan, Overseas Development Institute, Briefing paper, March

SUMMARY

There is considerable political attention paid across the EU to Africa-EU relations and strategy. This renewed attention is in most cases closely linked to member states political prioritisation of reducing migration especially across the Central Mediterranean route.

According to the results of our in-depth interviews, EU member states' approaches to migration are seen as mostly very short-term, with an emphasis on producing results within months, not years. Some member states, and many external observers, are very concerned at the related skewing of geopolitical and development priorities, projects, aid and other funding towards security and migration concerns. Yet ahead of the Abidjan summit in November, more long-term thinking is also under way.

There is much common concern across the member states over Africa's demographic challenges in the coming decades. Where some businesses see this a positive opportunity and economic driver, member states see it more as a threat and are, as a result, looking at ways to boost job-creation on a major scale, and at ways to develop both the private sector in Africa and to encourage European and other businesses to invest in Africa.

Overall, there is the broadest consensus across EU member states on prioritising jobs and economic development and harnessing the role of the private sector. Economic and job creation strategies also tend to include an emphasis on

creating widespread benefits across societies – and the need to find ways to benefit the population as a whole, avoiding marginalisation by social groups or geographical area.

Governance and building fairer, more stable and secure societies are also prioritised in this context. Corruption is occasionally mentioned, especially by businesses who see it as a top concern or barrier, while member states are more focused on stability in governance, democratic transitions, and to some extent human rights (though human rights are mentioned much less than the importance of the rule of law).

It is striking the extent to which the welcome emphasis on inclusive and wide-reaching political and economic policies benefitting all of society are mentioned as part of ensuring Africans stay in their own countries or move within Africa (which is the major trend today anyway) rather than as a value-driven or poverty-reduction goal in its own right.

Some member states, as well as observers, are concerned at the balance between the short and long term in the EU's thinking, and hope to see a shift back towards a more coherent, longer-term approach. Some recognise that there have been growing AU-EU tensions in recent years, linked in particular, though not only, to the EU's prioritisation of migration, and its characterisation of it as a threat. Others are more dismissive of these tensions and problems of tone and attitude.

There is an impression, from this study, of EU member states developing priorities and analyses without the extent of interaction and consultation with the AU side that might be expected (which is not to say that formal, official interactions do not occur). Ahead of the November summit, there does appear to be a focus on longer-term strategies and thinking, but these longer-term strategies are still being developed with the aim of discouraging migration to the EU now and in the coming decades.

Climate change is not prioritised as much as might have been expected by many member states. Given its importance as a risk multiplier for conflict, drought, famine, and migration – and its growing impacts – this is surprising.

There is broad agreement that focusing the November summit on youth is a positive approach. A number of member states are concerned that the summit should not focus too much on migration and security issues – important though they consider these to be. Others see it as inevitable that security and stability, together with migration, will be a key part of the summit.

A number of member states (including Germany, Sweden, Spain and the UK) do emphasise the importance of gender equality and rights, though this too is less high on the agenda in some states than could be expected, not least with the anticipated summit theme of youth.

There is also a range of views on conditionality across the member states – some, like Hungary and Austria, emphasise this while others, such as Spain, are concerned that strong negative conditionality can be very counter-productive. Whether to focus on a small number of priorities or have a broader, interdependent strategy is seen as a recurring debate. There is not widespread support for a highly focused strategy but there is support for the top priority focusing onto jobs, industrialisation and putting the private sector centre-stage.

Major areas that were, on the whole, not raised spontaneously in this study include urbanisation in particular, with agriculture and food security also mentioned rather infrequently. The UN Sustainable Development Agenda was mentioned to some extent but overall poverty-reduction strategies per se were not at the forefront of thinking for many concerned with strategy and policy development. So while there is long-term EU thinking on AU-EU strategy ahead of the November summit, that long-term thinking remains driven in most cases by shorter-term EU political priorities concerning migration, security and stability.



PART TWO

SURVEY RESULTS

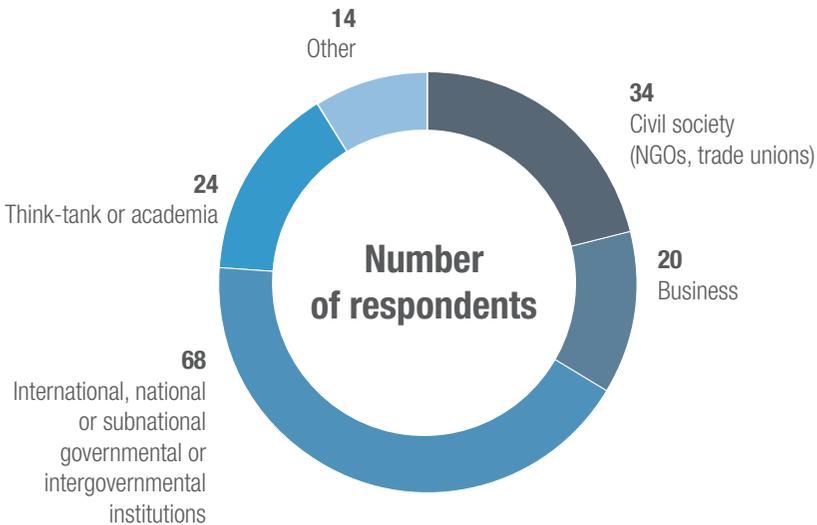
Friends of Europe surveyed its top-level networks of European and African policymakers and policy experts for this report. In this part, we analyse their responses, looking at where and to what extent they reinforce the results of the in-depth interviews and where they come to different conclusions and approaches.

There were 160 responses to the survey¹⁹, which was carried out in February 2017. The results provided here exclude ‘don’t knows’. Where there were substantial numbers of ‘don’t knows’, this is highlighted in the text.

The backgrounds of the respondents are set out in Figure 1. This is a group of participants that is well balanced between those working in government in some form, and those working across civil society, from NGOs to think-tanks to business.

The survey also has excellent geographical coverage. 69% of participants were from Europe, with respondents from 24 out of the 28 EU member states.²⁰ Just over one-quarter of the respondents were from Africa (27%), and almost four per cent were from elsewhere in the world.

FIGURE 1: WHICH SECTOR DO YOU WORK IN?



¹⁹ Totals are rounded up, so may not add precisely to 100%.

²⁰ The only member states where there were no responses were: Croatia, Cyprus, Malta and Poland. The highest number of respondents were in the following member states: Belgium, France, Germany, Italy, the Netherlands, Spain and the UK.

OVERARCHING VIEWS ON EU-AFRICA RELATIONS

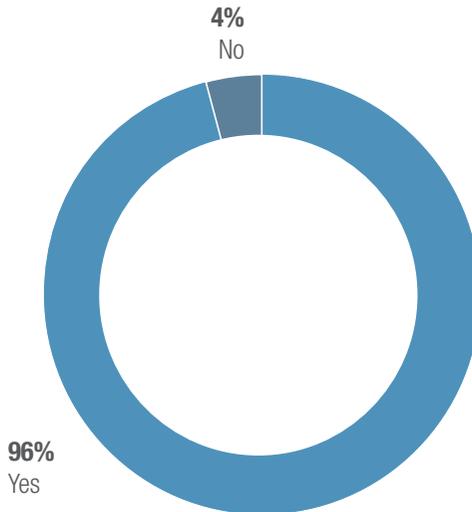
Just over half of respondents considered EU-Africa relations to be 'adequate'. Almost none of the respondents considered relations to be either very good or very poor. Twenty-four per cent considered relations to be 'good', while 20% labelled them 'poor' – a figure that rose to 30% among business respondents.

If good or very good EU-AU relations are to remain the goal of the joint AU-EU strategy then there is clearly scope for substantial improvement. The general assessment of

relations as 'adequate' suggests a functioning and perhaps functional relationship rather than anything more.

But there was very strong support for the need for the AU, African regional organisations and states to take more ownership of AU-EU common goals. Ninety-six per cent of respondents agreed with this as a goal (see Figure 2). This reinforces the analysis in Part One, which emphasised issues of African ownership of and responsibility for JAES goals and programmes.

FIGURE 2: DO AFRICAN REGIONAL ORGANISATIONS, THE AFRICAN UNION AND AFRICAN STATES NEED TO TAKE MORE RESPONSIBILITY FOR EU-AFRICA COMMON GOALS?



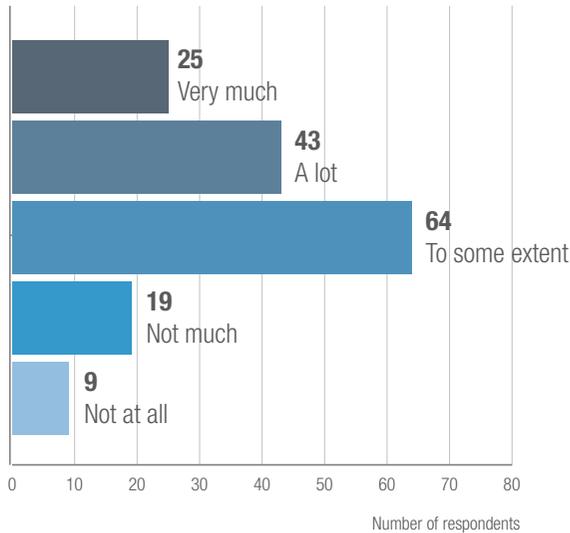
There was also considerable concern about the extent to which building compromise within the EU weakened the EU's strategic approach to Africa (see Figure 3).

Some thought this was an issue 'to some extent' (40% of our 160 respondents) while another 42% believed that this led to a weakening of the EU's strategy to a strong or high degree. This latter figure rose to 55% among business respondents.

There was little expectation that the EU would increase its financial contributions to Africa's development. 86% of respondents thought EU member states were not prepared to do this.

From these overarching assessments, it appears both sides of the AU-EU relationship have work to do if there is to be a truly powerful strategic approach, owned by both sides, with a strong and equal partnership between the two continents.

FIGURE 3: IS THE EU'S STRATEGIC APPROACH TO AFRICA WEAKENED DUE TO COMPROMISE ACROSS THE EU-28?



CHALLENGES AND OPPORTUNITIES FACING AFRICA

Identifying broad opportunities, strengths and challenges at a continental level is one element of developing a strong, effective AU-EU strategy. But this is inevitably a broad-brush exercise given the diversity across regions and even within states.

TOP FIVE CHALLENGES

Respondents were asked to identify what they considered to be the top five challenges facing Africa in the coming decade.²¹

Weak governance, including corruption, was identified as by far the most important challenge in our survey, with 78% emphasising this challenge. This links to the importance of governance raised in Part One of this report, gives it an even higher priority than the in-depth interviews suggested.

Two challenges came equal second: **conflict and insecurity** (including displacement and refugees) and **agriculture** (including food insecurity, investment, lack of land reform, and water management). These were both prioritised by 53% of respondents.

The emphasis on conflict and insecurity reinforces the results in Part One where security issues – current conflicts (including

Top five challenges

Weak governance
Conflict and insecurity
Agriculture
Demography
Infrastructure

those involving jihadi groups), fragile and failing states, refugee flows – were seen as major concerns. But agricultural challenges were raised surprisingly infrequently in the in-depth interviews.

The fourth-biggest challenge, as identified by our survey, is the **demographic challenge** (including rapid population growth, lack of jobs, migration and loss of human resources). This was prioritised by 52% and reflects the concerns (albeit to a lesser extent) of EU member states in the Part One analysis.

The fifth-biggest challenge is **infrastructure** (including transport, energy and housing). This was prioritised by 46%. In Part One, infrastructure came up periodically in the context of wider concerns about economic development, jobs and industrialisation. So there is a common concern on this issue.

²¹ Respondents were given a list of 12 issues, with the opportunity to add additional points.

Other priorities that fell outside of the top five were: climate change (45%), poverty reduction (41%), urbanisation (37%), inadequate education and healthcare (33%), investment (including inadequate private sector growth; 29%), trade barriers (to intra-African and Africa-global; 17%), and gender inequality (11%).

Climate change is seen as important but it comes after infrastructure in our survey's list of priorities. This reflects to some extent the lack of emphasis on climate change in the in-depth interviews. Although not seen as particularly important in the context of 'top five' challenges, responses to other questions suggests concern about trade barriers, gender inequality, and education and health.

TOP FIVE CHALLENGES							
OVERALL		BY SUB-SAMPLE					
		BUSINESS RESPONDENTS		AFRICAN RESPONDENTS		EUROPEAN RESPONDENTS	
1	Weak governance (78%)	1	Infrastructure (80%)	1	Infrastructure (74%)	1	Governance (82%)
2	Conflict and insecurity (53%)	2	Weak governance (75%)	2	Agriculture (68%)	2	Conflict (60%)
3	Agriculture (53%)	3	Inadequate investment and private sector growth (50%)	3	Poverty reduction (60%)	3	Demography (58%)
4	Demography (52%)	4	Urbanisation and tackling urban slums (45%)	4	Governance (54%)	4	Climate change (52%)
5	Infrastructure (46%)	5	Agriculture (45%)	=5	Demography (40%)	5	Agriculture (49%)
		6	Inadequate education and healthcare (45%)	=5	Inadequate investment (40%)		

When looking at different sub-samples, the differences in perceptions of challenges are striking – particularly between respondents from Africa and those from Europe.

Infrastructure is seen as the biggest challenge from a business perspective (80% of respondents) and among African respondents (74%). But for Europeans, it ranks only seventh – at 35%.

Business respondents rank education and healthcare, and urbanisation, as bigger challenges than is the case for survey respondents in general.

Meanwhile, African respondents rank poverty reduction as the third-biggest challenge, while it does not feature in the top five for business, Europeans or for survey respondents in general.

For respondents from Europe (the largest group in our sample), they are similar to the top priorities for survey respondents as a whole. But the presence of issues like conflict (second), climate change (fourth) and urbanisation (sixth) distinguish Europeans' perceptions from those of Africans.

Where all groups agree is in putting weak governance, agriculture and demography in the top five challenges (although not in the same order).

TOP FIVE STRENGTHS IN THE COMING DECADE

Our 160 respondents were asked to identify Africa's top five strengths in the coming decade.

The **private sector** (78%) with increased technology and innovation was considered to be the top strength, closely followed by **demography** (72%) - a growing youth population being seen as a strength than a challenge. This reverses the tendency in the Part One interviews to see it as a threat.

The third-, fourth- and fifth-biggest strengths were all bunched closely together. **Infrastructure** (just over 54%) is identified as the third top strength, with major infrastructure projects seen as an important opportunity. So while current infrastructure is seen as the fifth most important challenge by the respondents, it is at the same time the third most important strength and opportunity.

The fourth top strength is **agriculture** (almost 54%) – coming out of reform, investment and sustainable agriculture. So while agriculture is seen as a priority challenge, its positive future development is seen as a key strength for Africa.

Freer trade, both intra-Africa and international, was the fifth most-cited strength, by more than half of respondents. So while trade barriers were not identified as a top challenge above, the prospect of greater free trade in the coming decade is seen as a substantial opportunity. Taken together with the prioritisation of the private sector, this suggests economic



development and trade, with a core role for the private sector, are seen as major strengths for Africa in the future. This reinforces the emphasis in Part One that the in-depth interviews gave to economic development and the role of the private sector.

These top strengths partly reinforce the results from the in-depth interviews, particularly on the role of the private sector, infrastructure and trade. They give much more emphasis to agriculture than in Part One, and see demography as a much more positive opportunity.

Other strengths that were also identified by our survey include: increasing education and better health provision (49%), better governance at all levels (41%), lower poverty levels (32%), greater gender equality (28%), climate change mitigation and adaptation (14%), and well-targeted aid flows (14%).

TOP STRENGTHS IN THE COMING DECADES

OVERALL		BY SUB-SAMPLE					
		BUSINESS RESPONDENTS		AFRICAN RESPONDENTS		EUROPEAN RESPONDENTS	
1	Private sector (78%)	1	Private sector	1	Private sector	1	Private sector
2	Demography (72%)	2	Freer trade	2	Demography	2	Demography
3	Infrastructure (53%)	=3	Infrastructure	3	Infrastructure	3	Freer trade
4	Agricultural reform (53%)	=3	Demography	=4	Agriculture	4	Agriculture
5	Freer trade (53%)	5	Agriculture	=4	Education, training and health provision	5	Education, training and health provision
				6	Freer trade	6	Infrastructure

The importance of education and health, and of better governance, are both recognised in our earlier in-depth results, although our survey respondents emphasise both more strongly. It is notable that the potential for investment in climate change adaptation and mitigation is not seen as very strong at the moment. Equally, aid flows are not seen as a top strength – possibly agreeing with the views of some member states as reported in Part One (that aid flows are complementary to other development efforts).

When looking at different sub-samples, there are fewer differences on strengths than there were on challenges.

Business respondents have the same five strengths as survey respondents as a whole – just in a different order.

Looking at our respondents from Europe and from Africa, there is more agreement between the two than there was for challenges – but some differences remain.

Interestingly, once these subsamples are combined, their joint emphasis on education and health falls out of the overall top five – into sixth place.

So for business and those from Africa compared to those from Europe, there are differences of the ranking on strengths but they are rather similar overall in their top issues as a whole.

Looking at strengths and challenges together, demography, infrastructure and agriculture are all seen as important both as strengths and as challenges. The private sector and trade are emphasised as strengths, while governance, and conflict and insecurity, are prioritised as two of the top challenges.

Ahead of the AU-EU summit, it is important to note some of the differences in prioritisation between European and African respondents. In particular, our respondents from Africa prioritise both infrastructure and poverty reduction as top challenges whereas our respondents from Europe emphasise conflict and climate change. But they see strengths in a much more similar way.

The top-priority emphasis that EU member states put on the demographic and migration challenge is recognised by our survey respondents, even though overall it comes fourth as a challenge in our survey. Asked whether EU policymakers see the likely doubling of Africa's population by 2050 as requiring a radical change in approach or a doubling of existing efforts, 72% responded that it was seen as needing radical change. However, as we discuss below, our survey respondents do not see migration challenges in the same way as the in-depth interview analysis suggests EU member states do.

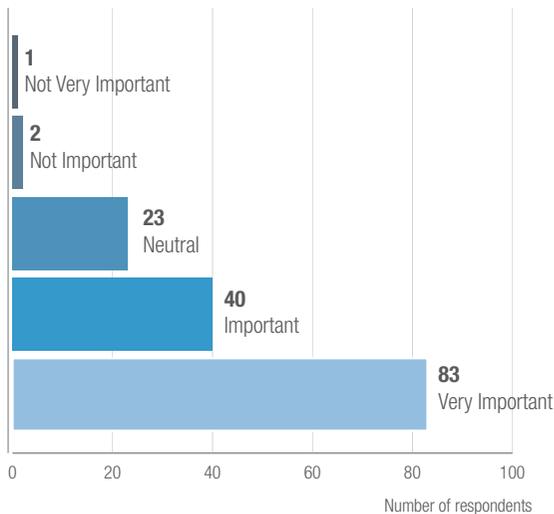
YOUTH AND GENDER EQUALITY

Looking ahead to the Abidjan summit, 92% of survey respondents said that they thought ‘youth’ would make a good top-level focus for the upcoming AU-EU meeting.²²

Within this youth focus, respondents were asked how important it would be to focus on women and girls’ rights to make high-impact change. This was overwhelmingly endorsed, with 98% agreeing that this was either fairly important, important or very important (see Figure 4).

This almost-unanimous agreement on the importance of including gender issues as a priority at the summit rather contrasts with the results above, on top priorities and challenges. It does, however, agree with the emphasis of some EU member states, as shown in Part One.

FIGURE 4: WITHIN A YOUTH FOCUS, HOW IMPORTANT IS IT TO CONCENTRATE ON WOMEN’S AND GIRLS’ RIGHTS TO MAKE HIGH-IMPACT CHANGE?



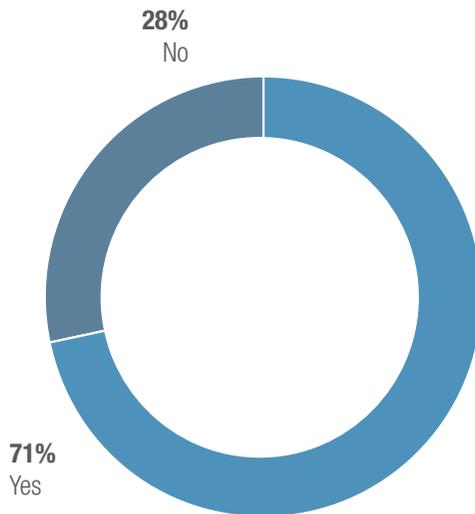
²² 17% of survey respondents answered ‘don’t know’ to this question.

MIGRATION AND SECURITY ISSUES

The respondents to our survey have rather different views on migration and refugee policy to those reported in Part One. Asked whether the EU is placing too much attention on its short-term goal of reducing migration flows, including refugee flows, 71% of respondents agreed it was, while 28% said it was not (see Figure 5). The view that too much attention was placed on short-term migration goals was held by 65% of those from Europe in our survey and 74% of those from Africa.

Those who consider the EU to be over-prioritising restrictions on migration were asked about the impact of this approach. Most respondents – 82% – thought the EU focus on migration challenges meant there is less attention to wider or priority development goals (see Figure 6). This concern was also expressed by some in the in-depth interviews, and was equally shared by respondents from Africa and Europe.

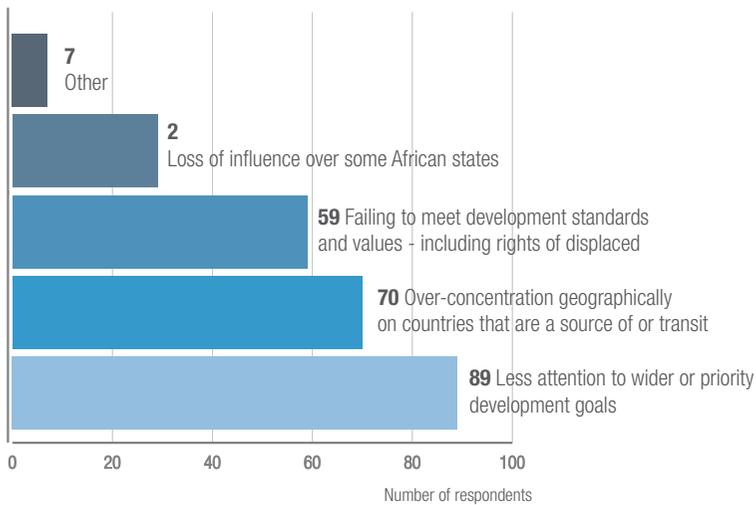
FIGURE 5: DO YOU CONSIDER THAT TOO MUCH EU ATTENTION IS BEING PLACED ON THE SHORT-TERM GOAL OF REDUCING MIGRATION FLOWS, INCLUDING REFUGEE FLOWS?



Another concern also found in some of the in-depth interviews is that the migration challenge is leading to too much geographical concentration on source and transit countries for migrants. This notion was supported by 64% of our 160 respondents. Furthermore, 54% are concerned that as a result of these policies, the EU is failing to meet development standards

and values – including rights of displaced people, and development aid being directed to inappropriate regimes. A rather smaller number – 27% – thought the EU was losing influence with respect to some African countries as a result. There was little difference in European and African views on these issues in our survey.

FIGURE 6: IMPACT OF EU FOCUS ON MIGRATION CHALLENGE



The view – expressed on the AU side and recently by the UN’s special representative on migration – that legal migration should be increased is also supported strongly by survey respondents who expressed a clear opinion, by a margin of three to one (see Figure 7).

Interestingly, those from Europe were slightly more likely to agree with increased legal migration than those from Africa. It is the business sub-sample, however, that is least sure on how to answer this question, with 55% of business respondents saying ‘don’t know’.

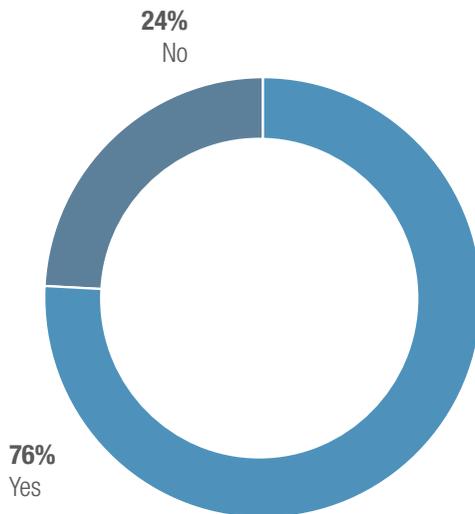
Overall, the way the EU is handling and prioritising the challenge of irregular migration

flows across the Mediterranean, together with refugee flows, is viewed rather critically by our survey group, just as it is by a number of expert and civil society commentators as reported in Part One.

In the run-up to November’s Abidjan summit and the next phase of the JAES it will be important for the EU to develop its long-term strategic thinking taking into account such concerns, especially on the AU side. Our findings suggest that the AU-EU strategy should focus on the overarching needs and interests of Africa, and not be moulded around EU priority political concerns on migration.

FIGURE 7: SHOULD THE EU OFFER SUBSTANTIALLY INCREASED ACCESS TO THE EU THROUGH LEGAL MIGRATION CHANNELS?

(excludes Don't knows)



SECURITY COOPERATION

On broader security issues, survey respondents also take a fairly critical view of the strength of AU-EU security cooperation. Over half of respondents, 56%, rate EU-Africa security cooperation as weak, while 36% see it as fair and only 9% rate it as good (see Figure 8).

While in Part One some experts had expressed concerns at the mainstreaming of security into development, 70% of the survey respondents saw AU-EU security cooperation as mainly considered separately from development. An even larger number – 83% – said security was not integrated in a coherent way with development aims.

There were also concerns as to whether EU-AU security cooperation was integrated with global institutional frameworks, including the UN – 70% thought it was not.²³

A wider geopolitical as well as security approach was supported by two-thirds of the sample. Asked whether the EU should focus on creating a more global geopolitical and geostrategic approach for Africa that embraces China, the US and other important international players, 66% agreed (see Figure 9). This reinforces suggestions in Part One for more trilateral cooperation.

23 There were a high number of 'don't knows' on this particular question, at 22% of the total sample.

FIGURE 8: IS EU-AFRICA SECURITY COOPERATION...

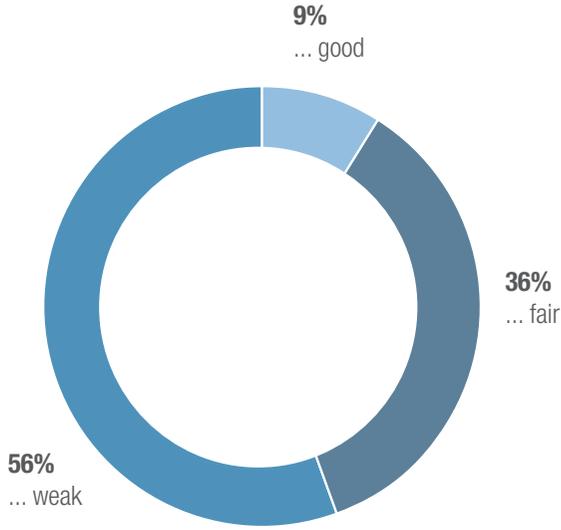
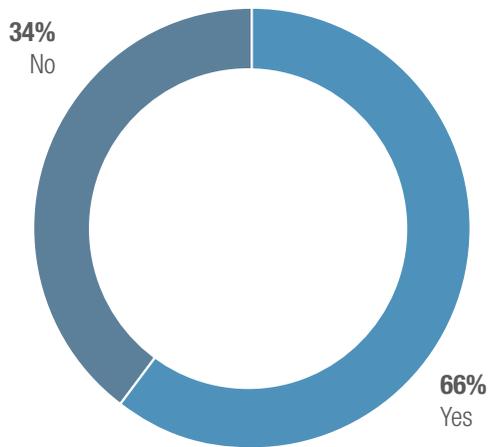


FIGURE 9: SHOULD THE EU FOCUS MORE ON CREATING A 'GLOBAL GEOPOLITICAL AND GEOSTRATEGIC STRATEGY' FOR AFRICA THAT EMBRACES CHINA THE UNITED STATES AND OTHER IMPORTANT INTERNATIONAL PLAYERS?

(excludes Don't knows)



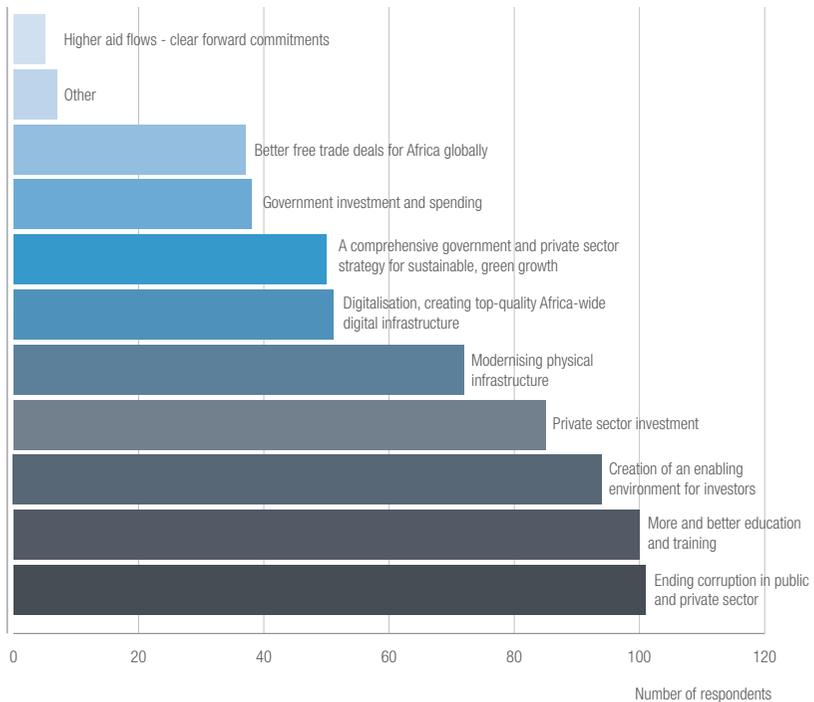
PRIVATE SECTOR JOB CREATION AND INVESTMENT

Given the widespread agreement on the importance and opportunities of a growing young population, of good infrastructure and of the role of the private sector, what do our survey respondents see as the most important ways of creating jobs in African countries?

TOP FOUR ISSUES FOR JOB CREATION

Asked to identify the top four priority approaches to support and encourage job-creation, the respondents gave top priority (63%) to ending corruption in the public and private sectors, followed by an emphasis on more and better training (62%). The third and fourth top priorities were creation of an enabling environment for investors (59%) and private sector investment (53%).

FIGURE 10: WHAT ARE THE FOUR MOST IMPORTANT WAYS TO CREATE THE JOBS NEEDED BY AFRICA'S GROWING POPULATION?



TOP ISSUES FOR JOB CREATION BY SUB-SAMPLE					
BUSINESS		AFRICAN RESPONDENTS		EUROPEAN RESPONDENTS	
1	Education and training (75%)	1	Enabling environment for business (71%)	1	Education and training (66%)
2	Private sector investment (70%)	2	Private sector investment (66%)	2	Tackling corruption (66%)
3	Tackling corruption (60%)	3	Infrastructure (60%)	3	Enabling environment for business (56%)
4	Infrastructure (55%)	4	Ending corruption (51%)	4	Private sector investment (48%)
5	Enabling environment for business (50%)	5	Education and training (40%)	5	Infrastructure (38%)

This emphasis on corruption reinforces the views of business highlighted earlier in this report, together with an emphasis on a need for African countries' growing workforce to have up-to-date, high-quality skills and training. The third and fourth priorities coincide with some member states' views in Part One on how to support and reinforce the role of the private sector.

In developing its approach in this area, the EU needs to be very alert to this wider set of views on the importance of tackling corruption and ensuring the availability of more and better education and training, placed ahead of other private-sector priorities.

The low emphasis given to free trade as a priority is noteworthy, as is the especially low support for higher aid flows in helping job creation. In this survey, job creation is seen as depending on good governance (the rule of law and absence of corruption), high skill levels, a broader enabling environment for the private sector, and investment by the private sector, followed by physical and digital infrastructure.

Among the sub-samples, there is much common ground – notably on private sector investment and tackling corruption. As in the earlier discussion on challenges, the importance of infrastructure job creation is emphasised more by business and respondents from Africa, while these two sub-groups differ on the level of importance of education and training and an enabling business environment.

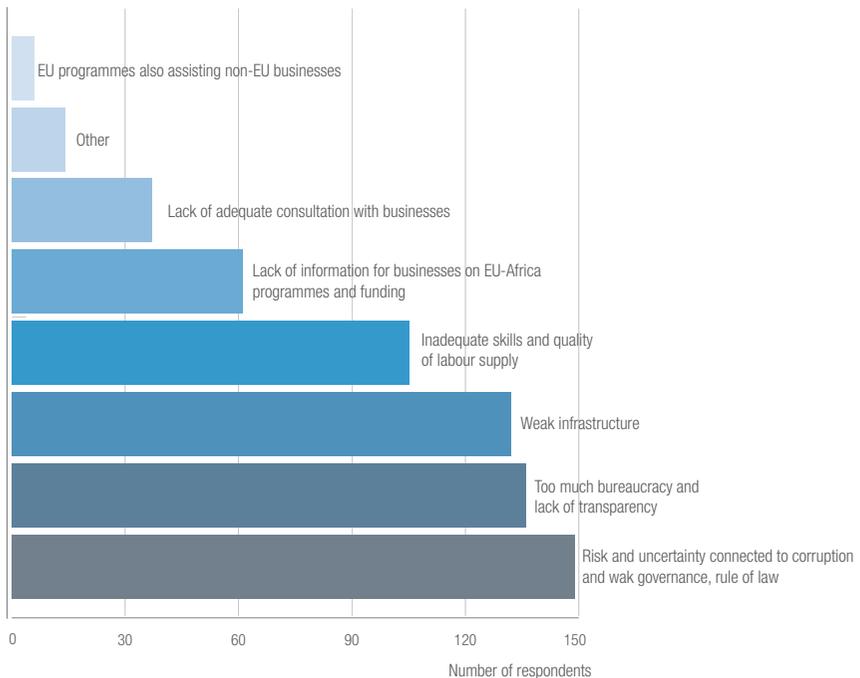
TOP FOUR CONCERNS FOR EUROPEAN BUSINESSES INVESTING IN AFRICA

Participants in the survey were also asked about their four key concerns for European businesses investing in Africa. Once again, risk and uncertainty connected to corruption, weak governance and rule of law comes out top – with 93% listing this as a top concern, followed by bureaucracy and lack of transparency, weak infrastructure and lack of transparency, weak infrastructure and inadequate skills and quality of labour supply (see Figure 11).

Some respondents also identified some information issues – including lack of information on EU-Africa programmes and funding (38%) and lack of adequate consultation with business (23%).

There was much less differentiation across some of our sub-samples for this question on four key challenges for European businesses investing in Africa. The business, Africa and Europe sub-samples identify the same four issues, ranked in the same order.

FIGURE 11: WHAT ARE THE FOUR MAIN CONCERNS FOR EUROPEAN BUSINESSES INVESTING IN AFRICA?



Overall, when asked about what is needed to create jobs and about priority concerns for European businesses investing in Africa, similar responses are given: governance, corruption and the rule of law on the one hand; skills and training on the other, together with an enabling environment for the private sector. Infrastructure is a priority issue for job creation among some of our sub-samples, but it is seen as a common concern across the sample for businesses investing in Africa.

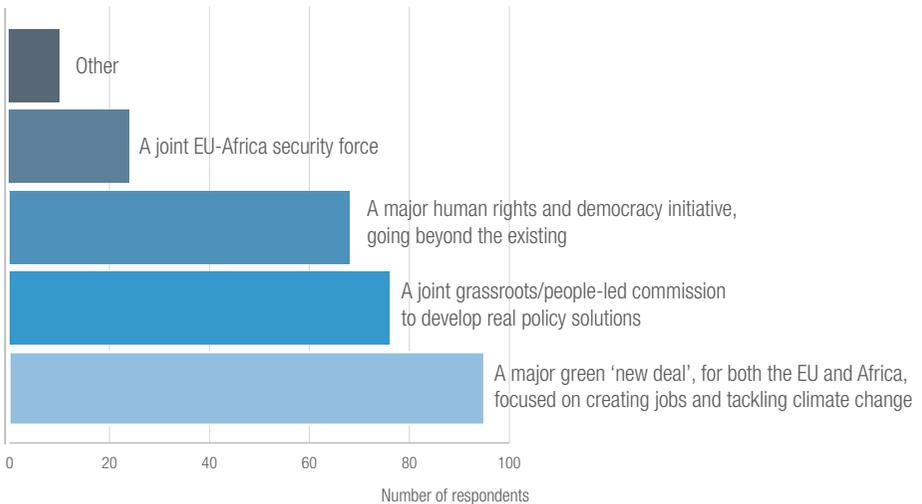
In Part One, job creation and industrialisation in the face of Africa's demographic challenge was a major priority across several EU member states. At the same time some member states emphasised governance issues. The views of our survey respondents reinforce the importance of governance as a priority goal if economic development and a positive role of the private sector in creating investment and jobs are to be encouraged.

OTHER PRIORITY IDEAS AND PROPOSALS

We gave survey respondents the opportunity to put forward their own priority ideas for the AU-EU strategy, as well as the chance to give their opinions on four possible new approaches. There was particular support for the idea of a major green ‘new deal’, for both the EU and Africa, focused on creating jobs and tackling climate change. This was supported by 59% of respondents. A proposal to establish a joint

grassroots/people-led commission on one or more key policy areas, genuinely empowered to come up with policy solutions, was backed by 47%. A major human rights and democracy initiative, going beyond the existing dialogue, was backed by 42%. Only 15% though supported the idea of a joint EU-Africa security force (see Figure 12).

FIGURE 12: WHICH, IF ANY, OF THE FOLLOWING EU-AFRICA INITIATIVES WOULD YOU SUPPORT?



Asked to put forward their own specific proposals, our survey group came up with a range of priorities and ideas that can broadly be grouped under the following headings.

1. Entrepreneurial support: our respondents had a range of ideas on how to support entrepreneurs – including younger and social entrepreneurs – and small and medium-sized enterprises (SMEs). Ideas included:

- making the creation of SMEs easier, including access to funding;
- a joint AU-EU investment fund to support young social entrepreneurs, based on a micro-finance approach, including a mentoring scheme;
- a focus on sustainable and ecological support for agricultural smallholders, and increased investment in better agricultural advisory services for smallholders;
- a shift to more practical entrepreneurial education in school curriculums, and wider support for the development of entrepreneurial skills;
- more knowledge and technology transfer; and
- bringing EU private sector expertise in at grassroots level, in priority sectors and projects, to help build capacity.

2. Economy, investment, and growth: there were a number of proposals regarding key areas to promote inclusive, high productivity growth. Ideas included:

- a more integrated development approach focused on creating an enabling environment for inclusive growth;
- an EU commitment to delivering major infrastructure projects creating a linked set of smaller projects that can strengthen the private sector, support sustainable development and encourage multi-stakeholder interaction;
- risk mitigation instruments for project financing;
- improving trade relations within Africa;
- eradicating illicit/black market trade and strengthening the formal economy, including more transparency, accountability, and supporting better public services; and
- addressing illicit financial flows as a priority, including tackling tax havens and illicit financial flows from Africa to the EU.

3. Governance and anti-corruption

measures: there were a number of proposals that prioritised good governance and tackling corruption. Ideas included:

- supporting the creation of effective national tax systems, and the development of welfare states;
- developing more anti-corruption programmes;
- using universal standards of good governance and anti-corruption, for both the AU and EU;
- prioritising better and higher impact good governance strategies and programmes; and
- supporting a stronger civil society.

4. Education and training:

education and training proposals were also emphasised – in addition to the ones noted above for entrepreneurial training. Ideas included:

- a focus on improving labour quality in Africa;
- creating youth networks around education to help tackle youth unemployment;
- enhanced academic and scientific mobility; and
- EU-Africa exchange programmes for a range of skills and people;

Many of these ideas also come up in EU member state policy strategies, such as the emphasis on infrastructure or good governance. Others are less often mentioned – illicit financial flows, like the role of civil society, were mostly mentioned in this study by experts and NGOs rather than by EU member states. It is notable that many of these additional suggestions from our survey focus on the priority issues identified earlier in this report – the role of the private sector, inclusive growth, good governance, and education and training. The importance of support for smaller firms and entrepreneurs was highlighted more by our survey respondents and some business voices than by EU member states.

SUMMARY

Our survey results reflect the views of very senior political, diplomatic, business, civil society, academic and think-tank figures based mainly in Europe and Africa. With almost half the respondents drawn from governmental bodies, it is not surprising that there is some complementarity between the policy views of EU member states discussed in Part One, and some of the survey findings reported in this part. But there are also many differences of emphasis and approach in the overarching views of our respondents.

Our survey suggests that the AU-EU strategy and relations are seen as adequate rather than good. Respondents think that African continental and regional organisations and states need to take much more responsibility

and ownership for joint AU-EU policies. Yet equally the EU is seen as not always presenting a clear strategic approach due to compromises among its own member states.

Survey respondents share the concerns of EU member states over key challenges facing Africa, including governance, demographic trends and security. However, our respondents put less emphasis on migration than EU member states did in our in-depth interviews, and more emphasis on the challenges facing the agricultural sector. Infrastructure is another key challenge that is emphasised in our survey – with climate change also important, but coming after infrastructure according to our respondents.



Looking at Africa's future strengths, our survey emphasises the role of the private sector, demography, free trade, agricultural reform and infrastructure. Our respondents see population growth, and a growing youth population, in a more positive way – as an opportunity, not just a challenge – than some EU member states do. Agriculture also comes more to the fore in our survey as a strength as well as a challenge. The same goes for infrastructure.

The proposal for the Abidjan summit in November to focus on youth is strongly supported by the survey, with a very strong emphasis on including women's and girl's rights within that youth focus.

Our survey shows repeated concern with issues of governance and corruption. The top priority for job creation was identified as ending corruption in both the public and private sector. Other key priorities included training, an enabling environment for business, and private sector investment.

Similar issues arise in questions on key concerns for European businesses investing into African countries, with concerns including governance, bureaucracy and lack of transparency, weak infrastructure and inadequate skills. Creating inclusive growth is emphasised by survey respondents, as is facilitating and supporting entrepreneurs and SMEs, and other risk-reduction measures. Tackling illicit financial flows and tax havens was also a recurring issue – and one which mostly was not raised in the earlier part of our study.

There are significant differences between our in-depth interviews and our survey results on migration. Our survey respondents see the EU as placing too much emphasis on migration, adversely affecting the geographical focus of the EU's policy aims within Africa and skewing development policies and values in unhelpful ways. Our respondents are rather positively inclined towards a substantial increase in levels of legal migration into the EU – much more so than the 'fortress Europe' approach exhibited in most EU member states.

EU-AU security cooperation is seen as relatively weak and not well integrated into global institutional frameworks. Our survey suggests there should be a more comprehensive, global geostrategic approach including other major global actors.

Overall, our survey results give a good guide to areas of agreement and common prioritisation, and where there is a need for open dialogue and more understanding of the range of views and approaches that exist – from migration, to private sector support, to governance.



CONCLUSIONS

This report has analysed how EU member states are strategically approaching the AU-EU relationship and strategy ahead of the AU-EU Abidjan summit in November 2017. It is asked the broad question of how to develop a new 21st-century AU-EU strategy fully taking account of the challenges and opportunities that lie ahead.

In doing this, the report has drawn on in-depth interviews with high-level officials in ten EU member states, together with interviews

with a small number of leading international think-tanks, NGOs, and business. We have also drawn on a major survey of 160 top-level policy-makers, business, civil society and academic organisations drawn mainly from the EU and Africa.

Our main conclusions are grouped under seven principal headings.



MIGRATION AND DEMOGRAPHIC TRENDS

The EU's political prioritisation of tackling and reducing migration and refugee flows into the EU across the Mediterranean is having a distorting impact on the EU's strategic approach to Africa. Short-term migration priorities are skewing both short-term and longer-term policy development programmes. These priorities are also leading to substantial criticism of the EU by a number of actors, with concerns about the impact on the EU's own values also raised by EU member states themselves. A 'fortress Europe' approach is no basis for a dynamic, strategic EU-AU partnership.

The EU's emphasis on migration as a threat, and a top priority, is not welcomed by African countries and institutions, and so is not contributing to a strong, equal AU-EU partnership. Some EU member states are also concerned that the prioritising of migration is distorting and damaging development policies aimed at poverty alleviation. There are also substantial concerns that the migration focus is leading to a geographical distortion of efforts towards the broad Horn-Sahel-West Africa regions, with a risk of Southern Africa and pan-African approaches being neglected. It is certainly notable that poverty reduction was

not raised as a top or dominant issue directly very often in this study. However, tackling poverty was a priority challenge for our survey respondents from Africa.

The demographic trends in the EU and AU are currently heading in opposite directions – with the EU's population becoming older, while Africa's population is expected to double by 2050. These trends are challenging but also represent opportunities. A more open, and constructive approach to joint AU-EU dialogue and policy-making around these challenges is needed.

The EU member states are currently unwilling, in most cases, to have an open public discussion about increasing legal migration from Africa, and about the EU's own needs for more labour mobility in the coming decades in the face of an ageing population. The AU and its member states also need to take more responsibility and ownership for the EU-AU joint strategy. Furthermore, the different narratives and political views between AU and EU on migration need to be addressed in a more open and equal and honest way.

JOB CREATION AND THE ROLE OF THE PRIVATE SECTOR

Looking at demographic trends, there is broader agreement that with such a steep rise in population African countries will need to find ways to create millions more jobs every year in the coming decades. The role of the private sector in creating such jobs is widely recognised. Key conditions to promote and encourage job-creation, according to the views expressed in this study, include in particular good governance, the rule of law and tackling corruption, an enabling environment for business, increasing the quality of labour via more and better education and training, and major improvements in infrastructure.

Strategies for a higher value-added industrialisation process are potentially positive, but a focus on industrialisation should not be at the expense of de-prioritising agriculture. Moreover, in both industry and agriculture – as well as services – policies to facilitate entrepreneurial networks, SMEs and new businesses are vital. If industrialisation policies simply work through and with governments and large businesses, rather than reaching smaller entrepreneurs and networks, they will not have the impact they could and should have.

The goals of prioritising job creation and industrialisation can form an important part of a revitalised AU-EU strategy, but these goals must be set in their own right, not skewed by migration fears.

Attention must also be given to urbanisation urban-rural links both in creating jobs and in ensuring food security, and an agriculture sector that can be sustainable and competitive. Growth strategies also need to be inclusive – economically and also politically.

Development aid is largely seen as complementary to wider economic policies and the role of the private sector, though there are, of course, a range of views on this complex issue. Within the EU, there are differences of view over conditionality, and whether and in what form – ‘more for more’ or ‘less for less’ – such conditionality should be introduced. This is one more issue where EU and AU views tend to differ.

GOVERNANCE, ANTI-CORRUPTION AND HUMAN RIGHTS

Governance has been emphasised repeatedly in this study. While some give top priority to the promotion of good governance, including in particular tackling corruption – in public and private sectors – others put more emphasis on economic strategies to promote job-creation.

Yet it is clear that without improvements in governance in many countries and regions, politically inclusive societies will not develop.

Nor will those societies provide an effective, enabling business environment for domestic and international businesses and investors.

Policies and strategies to promote good governance, the rule of law, anti-corruption and human rights already exist. These strategies can take time and effort to succeed but the difficulty of achieving the goal should not lead to a deprioritising of governance.

SECURITY, CONFLICT AND TERRORISM

Despite AU-EU differences on migration issues, there is more commonality on security concerns, including the rise of jihadi groups and terrorism threats. Having said that, many conflict situations in certain regions of Africa are proving fairly intractable, and there are some signs of donor fatigue in the EU concerning support for the African Peace Facility. There are issues here around ownership and financial contributions by the AU.

There is also a need for a review of strategic approaches. A narrow focus on ending conflict without a wider strategy for ensuring stability,

good governance, the resumption of public services and so on, is not sufficient. The EU also needs to hold itself to account more and better scrutinise how and where it works with different elements of the security apparatus in some African countries.

The EU's migration priorities are leading some to question the type of cooperation the EU is engaging in – and its impact, long-term effectiveness, and its fit with, or contradiction of, the EU's stated values.



YOUTH AND GENDER

There has been broad support across this study for an increased focus on youth, and for the Abidjan AU-EU summit to take youth as its broad strategic theme. If the summit does this, it can provide a positive and constructive framework for a revitalised AU-EU strategy that addresses many of the concerns and priorities raised in this study.

If the summit focuses on youth then there is a serious need for it to include some genuine youth representation. Within this theme, women's and girls' rights should be a major priority. While many EU member states continue to emphasise gender, some see this as a less important issue compared to migration and job-creation. However, the interdependencies between creating inclusive societies and economies, with good governance, respect of rights and inclusive political systems, suggest that a narrow approach that ignores gender equality, rights and other issues will not be effective.

With its rapidly growing population, Africa needs to harness the talent of women as well as men in its political, social and economic development. The EU must not treat gender equality as a second-order priority.

The AU-EU strategy needs to genuinely engage younger people in both Africa and Europe in discussion and creative policy-making for the future of both continents. The EU should consider promoting the idea of grassroots youth commissions that would be asked to come up with a range of policy proposals – with a commitment from the AU-EU strategy that a number of these policies would be taken on board.

There was also a strong concern expressed by a number of EU member states that the summit should not focus overly on migration and security – recognition of the tensions that the EU's prioritisation of these issues has created.

CLIMATE CHANGE, URBANISATION AND OTHER CHALLENGES

There were a number of issues that did not receive so much prioritisation in this study – both in the survey and in the in-depth interviews. The relative lack of emphasis on climate change is of particular concern since climate change is already a risk-multiplier for conflict, instability, food insecurity and often underpins reasons for displacement and migration. Climate change, even at the most optimistic estimates, is also set to continue to worsen. A failure to factor in climate change and to ensure there is a much more strategic approach to building climate

resilience and governance in the long-term risks being costly.

Despite the emphasis on demographic trends, the issue of urbanisation – which is surely one of the big current and future challenges across most African countries – was relatively little-emphasised. There are many interdependencies here that should not be ignored – from urban job creation, and urban-rural interaction on issues such as food supply, to the urban political, social and economic environment.

AU-EU PARTNERSHIP AND COMMUNICATION

While this study focused mainly on the views of EU member states, it is apparent that there are some challenges and tensions in the AU-EU relationship. The declared aims of a partnership of equals across the two continents is not always seen as consistent with current reality. There are clearly different AU and EU narratives and policy goals around migration.

More generally, there is a sense of the EU putting its own priorities and interests more to the fore – in part but not only because of migration challenges. At the same time, a number of EU actors do underline their intention of working with AU goals, including the Agenda 2063.

There is a need for more equal dialogue, interaction and listening. Some suggest there is a need for more honest dialogue. If that is taken to mean genuine constructive exploration of differences in view and approach, it is welcome. If it means – as in some cases it seems to – that this is a moment to express criticism and frustrations, then there is a need for some critical self-examination, on both sides, as well as diplomatic and political skills to come to the fore here.

Overall, at a time of global change, significant demographic trends in both Europe and Africa, the growing impact of climate change,

and many political and economic challenges and opportunities ahead, a business-as-usual approach will not be sufficient. The EU should be encouraging innovative and creative new approaches that address governance, job creation, urbanisation, growing youth populations, gender equality, industrialisation,

sustainable agriculture, and a strategic mainstreaming of climate adaptation and mitigation into these new approaches.

Across these areas, the EU and AU need to step up their strategic and creative thinking at this crucial moment.



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