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Africa Growth Report

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Africa Growth Report 2011

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Contents

1. Introduction: The International News Agenda and Africa[1]

Living in Africa and consuming local news on a regular basis, it is often difficult to remain optimistic. As a South African, I am exposed to stories of crime, including senseless hijacking and killings, sexual abuse of children, murders and fraud committed against the poorest of the poor, daily. Corruption, nepotism, and 'tenderpreneurs' – a newly created term for well-connected individuals making millions in backhand deals pervade local political reporting.

Then there is the Africa-focused coverage in international media. For the past decade, wars, famine, undemocratic regimes and violence have led this news agenda. Granted, not all coverage is negative. Many papers and news channels feature positive and uplifting stories of the continent. Though to citizens trying to see beyond doom and gloom reporting, 'feel good' news feels like a drop in the ocean.

Of course we must be realistic. Most of the coverage is accurate. Much of Africa experiences violence in a multitude of forms. From unjustifiably high crime rates to ploughing through red tape to do business, as well as fighting poverty and disease, rose-tinted glasses are not the answer to the challenges being faced by the continent. However, travelling through Africa, experiencing the people, witnessing the massive infrastructural changes and growth of entrepreneurs are more than just light at the end of this tunnel.

In South Africa for instance, the ALSI 40 index at the Johannesburg Stock Exchange, which had plummeted to a low of 18 040 in January 2009 (as low as last in January 2006) is now back at 32 500, an almost 90% increase. HIV/Aids figures are drastically decreasing. NGO's such as Education Africa are increasing their

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[1] The editors would like to thank Theresa Lotter and Gail Pearman for their assistance with proof reading and editing, and John Battersby for facilitation of contributions.

commitments, and the pass rate at schools is increasing steadily. Organizations such as the International Marketing Council of South Africa have a refocused mandate that impressed the world at the World Economic Forum in Davos in 2010.

And of course football has been a further proof point that the country can meet incredibly high standards and expectations. The 2010 FIFA World Cup™ has significantly improved international economic perceptions of the country, with global analysts taking an even more positive economic outlook than local financial analysts. But the success has also shown just how fragile this achievement is, when exactly five days after the closing ceremony, reminders of previous Xenophobic attacks, combined with a drawn-out, violent public service strike turned global media celebration to disbelief that 'everything had remained the same.'

In a profile of the country, German economic consultant Bert Rürup said that 'the country cannot afford to have strikes of such a nature.' Not just as a potentially negative signal to foreign investors, but mostly due to the impact the results of the negotiations could have on a country that was just starting to see the effects of the global economic downturn.[2] Rürup also stated, "South Africa is in a position where the economic future is decided not on the basis of economic or financial policies but rather on how it deals with social policies and domestic security".

For investors and corporates on other continents, media coverage provides a critical channel that influences perceptions. Even more critical are the assessments by economists and analysts in the international financial press. Media Tenor's research of this commentary in leading global financial media demonstrates that although the overall outlook seems to be positive, it is largely being driven by a commodities-based outlook. Assessments of Africa, as represented in the international press focus more on the current state of affairs over corporate results, trade initiative and economic policies. The absence of context leads to an intense focus on the num-

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[2] *Handelsblatt,* 11/8/2010

bers alone – a dangerous position to be in for any country or region.

It is exactly for this reason that we have published this book, which features the maiden Africa Growth Index. Rather than measuring actual growth, the Index, which will be published annually, compares how media coverage on individual African countries reflects reality. It draws from the reputable Ibrahim Index, which contains a wealth of information on the democratic progress of African countries. With solid and tangible variables, this index itself allows for the detailed assessment of the African context and of particular importance, provides historical data.

Our methodology also leverages data from the World Bank Doing Business Index, which indicates the state of affairs in Africa in terms of conducting business. Again, the variables utilized by this index are tangible enough to be reflected in media coverage. The comprehensive Global Competitiveness Report of the World Economic Forum, a combination of survey and real time data, provides additional insight into the stability and development of Africa's economies. Lastly, the Global Peace Index was leveraged. Developed by the Institute for Economics and Peace in Sydney, it is the first of its kind, analyzing the issue of global peace and stability.

Marrianne Nebbe, Senior Researcher at Media Tenor in South Africa has compiled a comprehensive overview of the current international media perception of Africa as a continent, and individual African countries. Moving away from the notion that only bad news sells, she unpacks the general patterns of global television media reporting. Her conclusion? That *Africa is not the only global problem child*. She also highlights that the solution for improved perceptions lies with individual countries' and their adherence to political and economic standards.

In the second part of her chapter, she details the findings of the Africa Growth Index. Although the general lack of coverage on African countries in non-African media have made some of the findings, there are encouraging results for countries that previously featured extremely negatively.

Our index will allow for the systematic assessment of Africa's economic and social performance on media coverage, and vice versa. Any changes in the real data should – if media are doing their job properly – be reflected in future changes within the index. It is important to note that although the analysis has been based on 2008 and 2009 media data, Marianne incorporates 2010 results from the Mo Ibrahim Foundation survey.. Looking at South Africa, the results show a drop of 4.22 points from the cumulative 2008/2009 assessment, despite what many will claim a positive impact of the 2010 FIFA World Cup™. However, since the index takes into account variables of economic and political stability, it is clear that despite the high awareness for South Africa during the World Cup, actual reporting on stability and development issues have deteriorated. Similarly for countries such as Angola and Algeria, who together with the Comores and Ghana topped the 2008/2009 assessment have dropped slightly in terms of media coverage. Some of the largest improvements can be seen for countries such as Rwanda and Kenya.

Additional contributions will provide you with forward thinking in the areas of African politics, economy and society. In Section 3, Africa's economic prospects are scrutinized through a contribution by the Monitor Group's Africa Growth Report. Focusing particularly on the role of cities, the importance of infrastructural investments and human asset cultivations, this analysis shapes the many opportunities that exist within Africa's economic hubs.

John Battersby, the UK country manager of the International Marketing Council of South Africa and his Chinese colleague Yingni Lu unpack the latest developments between South Africa and China. In December 2010, South Africa was invited to join BRIC (Brazil, Russia, India and China), an 'international nod' that could have far reaching effects on other African countries. With both India and China being significant investors in Africa, the article focuses on the benefits and opportunities of working with these economic powers.

Nicholas Norbrook, the Managing Editor of the Paris-based Africa Dialogue magazine takes a look at the changing role of manufacturing in Africa. It seems that not all of Africa is embracing the new business partner, but Norbrook shows that it can have an enormous influence as far as export capacity is concerned.

Jeroen van Wijk, Frank M. Go and Robert Govers assess the impact of Africa's reputation on the local tourism industry, focusing extensively on the contribution that African countries themselves have on marketing their products. They ask an important question. 'How can African suppliers leverage global virtual networks to expand their presence in the high value-added activities of branding and marketing?' By analyzing the content of African tourism websites (Rwanda, Mozambique and Uganda), the researchers conclude that Africa's tourism marketers face two challenges, i.e. relying too heavily on international IT networks combined with a weak local internet availability and too much marketing around nature and fauna, to the detriment of culture and heritage.

In Section 5, Herman Wasserman, Professor at Rhodes University in Grahamstown, South Africa interrogates the impact of mobile technology on socio-economic development. 'Hot of the press' he is looking at the role of social media in the latest social uprising in Tunisia. He then refers to the early assumptions that the internet and mobile phones in particular have historically been seen as the ultimate solutions for growth and development in Africa, but firmly challenges this. While the technology certainly has considerable benefits, Wasserman sees mobile phones not merely as technologies *transmitting* democratic and civic information, but also as the location where people are *transgressing* the hitherto fixed boundaries of what counts as political participation or civic identification.

Since Kofi Annan has left the United Nations, he has tirelessly promoted Africa and its opportunities. Even more importantly, in his work as the Chair of the Africa Progress Panel, real solutions have been suggested. Mr. Annan reminds us in his article (chapter 6) that in order for Africa to succeed, it needs a co-operation internally, but also with its international partners. Leadership is here the key, and Mr. Annan appeals to those in power to ensure that the revenues of the increasing economic opportunities are channeled back to those in social need, rather in the pockets of a few. He is particularly mindful of the role of women in Africa and sees in the empowerment of women the key for particularly agricultural productivity.

There is no doubt that Africa, just like other continents, faces huge challenges. The burdens of poverty, a lack of education and in many cases lack of political stability are hindering transformative economic and social growth for all. But for the first time the silver lining is becoming clear, and not just due to outside intervention. Africa has recognized that in order to shed the burden of past mistakes, it must take initiative. New business relations, increased South-South economic corporation, improvements in the battle against HIV/Aids and malaria are all signs that Africa is indeed moving forward, and is ready to embrace the opportunities presented by a changing global business environment.

Pretoria, 1/17/2011 Wadim Schreiner, Marrianne Nebbe

2. The African Growth Index by Marrianne Nebbe

This chapter is divided into two sections. The first focuses on foreign perceptions of Africa within the context of broader media trends. The Africa Growth Index, presented in the second section will assess to what extent African countries are reported on by the media, in accordance with criteria of the Mo Ibrahim Index and World Bank Doing Business Index.

2.1. Media Perceptions of Africa

2.1.1. Introduction

Representations of Africa have been challenged in the past by movements such as pan-Africanism; Thabo Mbeki's proclamation of the African Renaissance can be regarded as another attempt to challenge existing perceptions of Africa (Okumu, 2002). An African Renaissance has the potential to transform the lives of Africans who have been ravaged by the legacy of colonialism (Okumu, 2002). The slow, yet incremental growth of a small number of African countries (such as South Africa, Ghana, Uganda, Mozambique as well as Tanzania) in recent years, however, does not seem to warrant excitement or represent a solid indication of the beginning of an African Renaissance (Cheru, 2002).

Over the past decade, coverage focusing on Africa has predominantly been negative. The international focus has primarily been on countries marred by socio-political problems, e.g. Zimbabwe and Sudan. It could be argued that Africa is seen as the world's "*problem child*", as extensive reportage on negative issues such as personal safety and political unrest hampers its reputational progress. Notably, it is negative perceptions of this magnitude that lead to strained foreign relations for Africa's 54 countries.

Methodology

To ensure that comprehensive and in-depth insights are achieved, Africa's reputation cannot be reviewed in isolation. Therefore, the coverage of the continent has been assessed within the context of the broader media environment. An analysis of general media trends has been incorporated so as to enhance understanding of the degree to which the bigger picture impacts on international perceptions pertaining to Africa.

The study of general media trends has been conducted using computer-assisted content analysis. The content analysis methodology applied is that of the International Media Tenor Institute for Media Analysis (2010), which is based on Berelson's (1952:18) definition: "Content analysis is a research technique for the objective, systematic and quantitative description of the manifest content of communication" (see also Stempel, 1989:124-136).

A total of 1,634,508 reports were analyzed between 1 January 2000 and 31 December 2010. Data utilized for this analysis included ABC World News, Al Arabiya, Al Jazeera, Al Manar, ARD Tagesschau, ARD Tagesthemen, BBC World Service, BBC1 10 o'clock, BBC2 Newsnight, CBS Evening News, CCTV, CNN International Desk, Dubai TV, FOX Special Report, ITV News at Ten, LBC, NBC Nightly News, RAI TG1, RTL Aktuell, SAT.1 18:30, SF Tagesschau, TF1 Le Journal, TRT Ana Haber Bülteni , TVE1 Telediario 2, ZDF Heute, ZDF Heute Journal, eNews Prime Time, SABC 3 English News, SABC 2 Afrikaans News, SABC Zulu News, SABC Xhosa News, SABC Sotho News as well as SABC Venda News .

2.1.2 Africa and beyond: coverage in the context of global media trends

This section examines Africa's foreign media profile, by comparing coverage of the continent to coverage of other regions. Four questions guide our discussion**:**

- Is Africa's image vulnerable to the bad news syndrome?

- Is Africa alone in facing reputational challenges?
- Which issues result in intensified negative perceptions for the continent?
- Which topics contribute to a more positive portrayal of Africa?

Is negative news bigger news?

Media Tenor's research finds that general media trends have contributed towards extensive negative reportage on Africa. In general, coverage since 2001 has been more negative, indicating that internationally, news broadcasters tend to be more critical in their analysis of stories and that newsrooms focus extensively on negative events.

Perhaps the numerous natural disasters during the decade have contributed to this mind-set. Consider the 2004 Indian Ocean Tsunami in Southeast Asia, Hurricane Katrina, the earthquake in Haiti, the 9/11 terrorist attacks and the subsequent war in Afghanistan, the global economic crisis in 2008, as well as the socio-economic and political crisis in Zimbabwe.

An increased tendency to evaluate news events more critically, combined with an intensified focus on negative stories may have set the stage for greater scrutiny of news events pertaining to Africa. To this effect, Professor Frank Go (Killelea & Schatz, 2010) argues:
Only by virtually boycotting media is it possible to ignore the notion that we live in an age of crisis. The news is about contagious diseases, natural disasters, famine, rising unemployment, armed conflicts, food insecurity, terrorist attacks, environmental hazards, urban and rural problems threatening our safety and security.

Historically, various researchers including Gerbner & Marvanyi (1977), Atwood (1984) and Sreberny-Mohammadi (1996) have analyzed international news flow. The common thread lies in the conclusion that the Third World, and especially Africa, has largely been portrayed in a bad-news-syndrome fashion (see Glasgow University Media Group, 1976; Cohen, Adoni & Banz, 1990; De Beer & Steyn, 1996). Stevenson (1997) and his colleagues conducted perhaps the largest ever news flow study, that involved researchers from more than 40 countries. Most studies show a remarkably similar pattern of global news coverage (Hamelink, 1994; Sreberny- Mohammadi, 1995; Mowlana, 1997):

a) News about the West dominates international news flow.

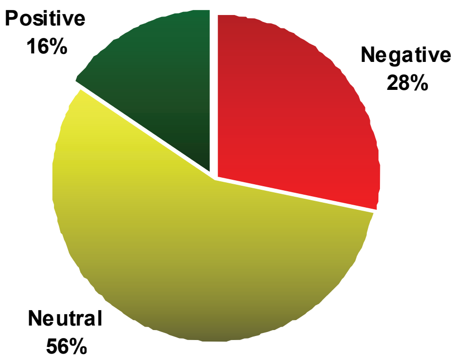
b) Western news agencies dominate international news flow.

c) News topics are defined in terms of Western news values.

d) International news flow is dominated by 'negative' news.

According to Galtung and Vincent (1992:7) a certain criteria must be met for news to become part of the international flow process, i.e. if it concerns elite countries and people; if it can be seen in personal terms, and if it can be perceived as having negative consequences. The more frequently this is met, the more likely that the event will become international news.

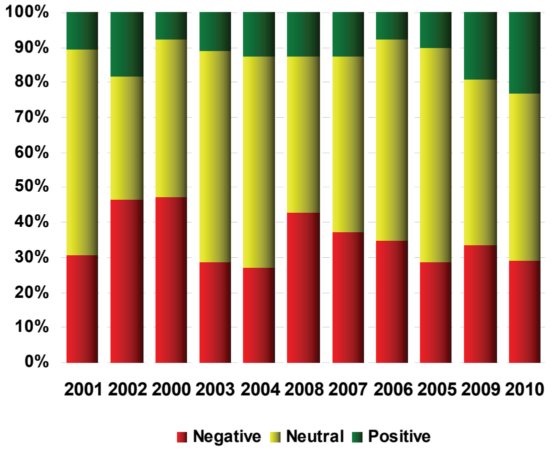
Chart 1: **Rating of all news in international television news, 2001-2010**



Basis: 1 634 508 reports on all issues in 35 analyzed TV news media 2001 - 2010

In their overview of news flow studies, Cho and Lacy (1999) conclude that cultural similarities, shared history and geographic proximity are related to international news coverage, as are ideological affinity, economic relationships, societal values, the nature of the gatekeepers and organizational factors. The authors also find that coverage emphasizes conflict and disasters, that the bulk of international coverage focuses on political news, that the news tends to be hard news and that the international news agencies are the main source of international news.

Chart 2: **Africa – the Long-Term Trend, 2000-2010**



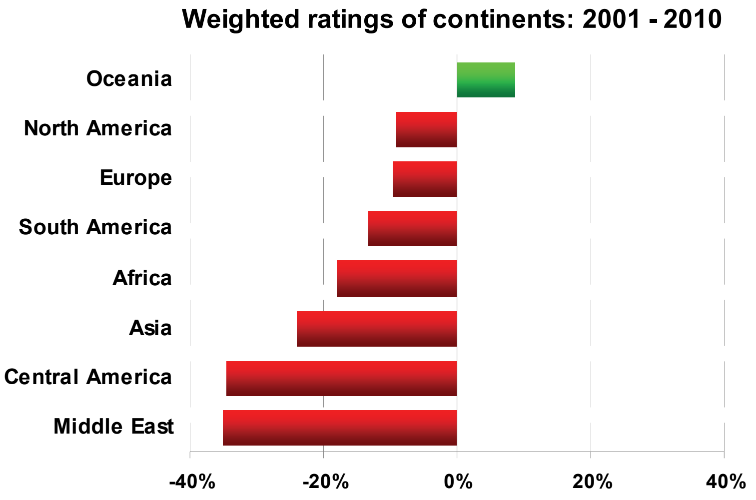
Basis: 65,007 reports on Africa in 35 international TV media

Is it just Africa?

An increased global trend of intensified negative reportage shows that Africa is not the only continent facing reputational challenges. Media analysis undertaken over time indicates that coverage of all continents, with the exception of Oceania, is mostly negative. Regions that have received the most intense negative focus are the Middle East, Central America and Asia. Even continents such as Europe and North America have been negatively portrayed by other regions.

International interest pertaining to regions receiving the most scrutiny is connected to "*troubled countries*", which contributes towards inherent beliefs of a specific region. These countries are also associated with issues that serve to sustain existing beliefs and stereotypes. Countries or regions with the most international coverage are the Middle East, Iraq and Afghanistan. It is hardly surprising that the top issues under the spotlight relate to conflict and terrorism.

Chart 3: **Foreign perceptions of continents**



Basis: 648 168 reports on all non-domestic issues in 35 analyzed TV news media 2001 – 2010

As stated earlier, Africa's reputation is marred by intensified interest pertaining to countries such as Zimbabwe and Sudan. Zimbabwe came under media investigation due to land grabs of white-owned farms since the year 2000, as well as political friction between the ruling Zanu PF and the opposition MDC. Sudan garnered increased interest because of ongoing conflict in Darfur, with the secession vote being the most recent point of deliberation in international media.

Which topics result in intensified scrutiny?

An analysis of each continent's top issues over the past ten years (detailed in Table 1) indicates that regions perceived more negatively are regarded as being politically volatile and prone to conflict.

Table 1: **Top 10 issues associated with individual continents**

Continent	Top issues	Ranking of top issues	No. of reports	Weighted ratings
Middle East	International politics	1	29680	-24%
	Warfare	2	21804	-50%
	Politically motivated crime	3	12764	-78%
	Defence policy	4	6119	-19%
	Domestic politics	5	3197	-28%
	Elections	6	3176	-11%
	Domestic security	7	2464	-34%
	Justice system	8	1912	-57%
	Accidents/disasters	9	1508	-68%
	Social policies	10	1254	-9%
Central America	Accidents	1	3055	-67%
	Domestic politics	2	1224	-41%
	International politics	3	1078	-10%
	Non political crime	4	836	-77%
	Cricket	5	661	17%
	Domestic security	6	613	-40%
	Developmental aid	7	605	-4%
	Warfare	8	516	-47%
	Health system	9	485	-66%
	Environment	10	414	-56%
Asia	Accidents	1	10871	-75%
	International politics	2	7184	-20%
	Politically motivated crime	3	4929	-74%
	Domestic politics	4	3625	-39%
	Economy	5	2761	-1%
	Soccer	6	2643	29%
	Domestic security	7	2259	-41%
	Cricket	8	2105	17%
	Olympic Games	9	1871	23%
	Warfare	10	1764	-49%
Africa	International politics	1	8351	-8%
	Economy	2	6135	1%
	Soccer	3	4789	15%
	Elections	4	3986	-18%
	Non political crime	5	2965	-45%
	Accidents	6	2560	-75%
	Politically motivated crime	7	2556	-70%
	Warfare	8	2150	-66%
	Domestic politics	9	1768	-36%
	Justice system	10	1618	-39%

Continent	Top issues	Ranking of top issues	No. of reports	Weighted ratings
South America	Accidents	1	2246	-58%
	Domestic politics	2	977	-20%
	Soccer	3	858	22%
	International politics	4	644	-13%
	Non political crime	5	507	-60%
	Politically motivated crime	6	475	-28%
	Production process, productivity	7	399	9%
	Elections	8	370	17%
	Formula One	9	370	35%
	Environment	10	249	-18%
Europe	Soccer	1	17811	19%
	Accidents	2	15167	-60%
	International politics	3	12689	-11%
	European Union	4	9809	-4%
	Non political crime	5	9779	-65%
	Economy	6	6474	0%
	Politically motivated crime	7	5795	-66%
	Domestic politics	8	5737	-27%
	Domestic security	9	5063	-38%
	Culture	10	4783	37%
North America	Accidents	1	6548	-53%
	International politics	2	5763	-8%
	Economy other	3	3940	-3%
	Non political crime	4	2926	-76%
	Golf	5	2738	41%
	Culture	6	2486	42%
	Elections	7	2009	17%
	Justice system	8	1968	-45%
	Domestic security	9	1605	-31%
	Technology, research, science	10	1584	18%
Oceania	Rugby	1	2444	14%
	Cricket	2	1680	26%
	Accidents	3	1620	-54%
	Tennis	4	1313	43%
	Formula One	5	499	32%
	Water sports	6	303	52%
	Environment	7	253	-24%
	Non political crime	8	180	-64%
	International politics	9	161	8%
	Minorities	10	148	-25%

Basis: 140,370 reports in 35 analyzed TV news media 2001 – 2010

The Middle East is a case in point. Of the top ten issues most frequently reported on for the region, the first six pertain to politics. All of these issues have been reported on very negatively. Central and South America, Asia and Africa have also been closely associated with political issues, with scepticism driving the news agenda around these continents' political climates. War has been a prominent issue for the Middle East, Central America, Asia as well as Africa.

What is concerning is the fact that of the top ten issues associated with Africa, six pertain to political conflict and violence. Following the Middle East, Africa received the most expansive media attention relating to political turmoil. An extensive focus on crime and violence that was not politically motivated enhanced perceptions of an unsafe continent.

What issues contribute to positive perceptions of Africa?

There is a considerable upside to Africa's prominence on the global news agenda. Positive aspects in the popular media that pertain to the continent not only strengthen perceptions, but subsequent international ties.

Considering that Africa is the only continent to achieve positive international media appraisal, albeit moderate positive attention, with regard to economic development and growth. Not only was the issue rated positively, but as the second highest reported topic it received much prominence.

Africa is widely considered to be a wealth of business opportunity. It has even been said that Africa has buffered the world economic crisis to a certain extent. Kuseni Dlamini, former CEO of mining company, Anglo American said, "Now there is a great era of opportunity for Africa to rise and shine in the global scheme of things and be met as an economic giant"

Recently, international banks such as Barclays, ICBC and HSBC have been looking to Africa to expand their businesses. Major retailers such as Wal-Mart have also entered into business ventures on African soil. Executive vice-president of Wal-Mart, Andy Bond stated, “South Africa possesses attractive market dynamics, favorable demographic trends and a growing economy” (Toronto Star, 28/09/2010). UBS analyst, Neil Currie reportedly agreed and was quoted as saying: “We believe that South Africa represents an attractive growth market” adding that South Africa has relatively strong infrastructure and a well-developed legal system” (The Globe and Mail, 28/09/2010).

What do the financial analysts say about the African economy?

Financial Analyst opinions often inform broader media debate. It is therefore important to examine the way in which this influential community perceives the African economy.

Based on analyst opinion in print media, Europe and North America are regarded as the global financial powerhouses. Volume of coverage pertaining to Africa is not comparable to these continents. Although Africa does not gain the same consideration as Europe and North America, it could be argued that it is a leader amongst developing economies, as it is the second most prominent emerging market receiving interest. A rapidly growing Asia dominates coverage on emerging markets.

Chart 4: **Size of focus in financial analyst quotations on various continents**

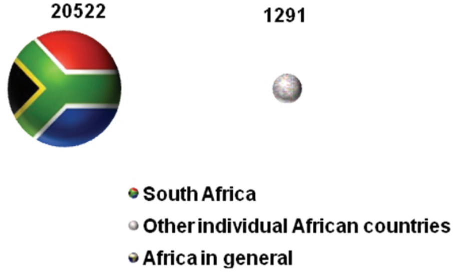
Basis: 361,038 statements made by financial analysts on foreign countries in 35 analyzed TV news and selected print media 2009 - 2010

The dominance of European, North-American as well as Asian economies resulted in a shortage of in-depth analysis of the African economy. Not only was there a lack of critical debate pertaining to African economies, but Africa and North America were the only continents receiving mostly negative reviews. The negative analyst discussion pertaining to African economies contrasts a more favorable outlook by the popular media.

Of the various African economies, South Africa was the country that secured the most international debate. Frankly, there was a lack of interest pertaining to other African economies. Media Tenor data suggests that this lack of media discussion serves to further undermine awareness of the development of the continent. It could also result in sustained interest in socio-political problems facing the continent.

Perhaps the reason as to why Africa receives such little interest is because discussion of Africa is commodity driven. Less focus is applied to the actual growth of economies and the positive stories driving this. There is no coherent, clear messaging relating to the African economy. A dearth of coverage pertains to goals made or goals achieved.

Chart 5: **Volume of analyst debate pertaining to the economies of individual African countries**



Basis: 22,845 statements made by financial analysts on Africa in 35 analyzed TV news and selected print media 2009 - 2010

To say that economic growth alone will be the solution for Africa may be somewhat of an exaggeration. The World Cup was the third highest issue covered by media, with coverage being largely positive. However, other than economic growth and soccer, there was minimal interest pertaining to positive issues on African soil. The inherent risk in this context is high given that:

a) South Africa was most closely associated with the 2010 FIFA World Cup™. Although the mega event was hosted on the continent, it delivered few benefits for countries other than South Africa.

b) The 2010 FIFA World Cup™ is over. Africa needs to focus the international community's attention on other positive aspects.

c) Media Tenor data indicates that the impact of hosting the 2010 FIFA World Cup™ on African soil was compounded by negative news events such as the strike by civil servants in South Africa, immediately after the tournament.

The absence of positive stories leads to unbalanced perceptions of any given continent. The Middle East is a prime example of how a tendency to report only on negative aspects, such as conflict and war results in crystallized international perceptions of, and attitudes towards the region – and most noticeably, Muslims.

Agenda-setting theorists suggest that media reportage sets the public agenda and subsequently informs the dominant discourses at a given time (McCombs, 2004). The effects of the tendency of the international media's continual scrutiny of the Middle East extends to popular culture, depicted through film and literature. Films depicting the Middle East such as "*The Hurt Locker*" (Bigelow, 2008) as well as "*Brothers*" (Sheridan, 2009) portray the region in an intensely negative way. Novels such as "*The Stoning of Soraya M*" (Sahebjam, 1990), "*The Kite Runner*" (Hosseini, The Kite Runner, 2003) and "*A Thousand Pleasant Suns*" (Hosseini, A Thousand Splendid Suns, 2008) further perpetuate negativity.

Are there positive stories that are being neglected by the international community, or is the Middle East so overwhelmed by constant political turmoil and conflict that there are no positive stories to tell? Could Africa suffer similar consequences to that of the Middle East, due to a lack of international interest in positive stories?

If popular culture is indicative of the news media's role in shaping perceptions of the continent, then this may well be the case. Africa has been featuring in a number of commercial films such as "*Hotel Rwanda*" (George, 2004), "*Blood Diamond*" (Zwick, 2006) and "*The Last King of Scotland*" (Macdonald, 2006), that depicted the continent as being politically volatile and prone to violence.

Signs of negative international sentiment towards Africa are not only visible in mainstream news media and popular culture. The fact that debate by hard-hitting financial media such as The Financial Times and The Wall Street Journal is in line with broader trends of reporting on Africa is telling of dominant conversations. On 7 January 2011, the Wall Street Journal reported:

The history of Sudan is of the fight for independence. We have wanted our independence since before day one in 1955 [when civil war broke out]," says Peter Kor, 48, a southerner who assisted military training camps in Ethiopia for 16 years as part of a war effort in exile.

A vote for separation in the referendum will lead to a new country being established six months later. The nascent state has 18 near-embassies scattered about the globe and even a committee given the task of creating a national anthem. Posters in Juba declare a vote for "separation" is a vote for "freedom". A street jamboree urges people to vote in the poll, which requires a 60 per cent turnout for it to be valid.

A vote for separation will by no means spell the end of instability. The new country's borders remain unclear. Sudan's middle belt harbors both oil and a mix of northern and southern groups. So controversial is one border territory, Abyei, that a separate referendum to decide whether it should join the north or the south has been shelved.

The nascent state is also grappling with extreme poverty, illiteracy, debt and often violent competition among its ethnic groups, problems which may undermine its existence.

Some predict tension with the north could erupt into violence, partly spurred by competition for oil largely located in the south that makes up half the North's income. The UN confirmed a bombing raid last month on the southern border province of Western Bahr al-Ghazal but the north denies responsibility.

Some fear disaster. The UK has allotted emergency aid in anticipation of southerners leaving the north. Oxfam, the UK aid agency, has also launched emergency programs in the border area pending a humanitarian crisis. The UN says 143,000 have left the north in the past few months and 2,000 are returning daily

To a large degree, negative perceptions such as these tarnish each of Africa's countries' standing in the international community. For every negative sentiment, published or broadcasted, countries must at least double their brand building investment and efforts.

2.1.3. Perception versus reality

In the previous sections we briefly touched on words such as "*agenda setting*", "*public agenda*", "*dominant discourses*" as well as *"perceptions"*. In this section, we add the word "*reality*". It is difficult to reconcile the word "*reality*" with concepts such as *"dominant discourses"* and *"perceptions"*, because perceptions may be different to reality. This section interrogates whether media perceptions are in line with the reality, by focusing on the major deal maker's i.e. economic growth and deal breakers, i.e. conflict and violence, for different regions. Conclusions are based on a comparison of Media Tenor research with the following reports:

a) The World Economic Forum (WEF) Global Competitiveness Report 2010 – 2011: This report is considered to be the most comprehensive assessment of its kind; it contains a thorough profile for each of the 139 economies analyzed, as well as an extensive section of data tables with global rankings covering over 100 indicators.

b) The Global Peace Index for 2010: "This index is a groundbreaking milestone in the study of peace. It is the first Index ever to rank 149 nations of the world by their peacefulness (or absence of violence) and to identify potential drivers of peace" (Killelea & Schatz, 2010).

a) WEF Global Competitiveness Report

In line with economic theory of stages of development, this Global Competitiveness Report assumes that in the first stage, the economy is factor-driven and countries compete based on their factor endowments, which are primarily unskilled labor and natural resources. Countries then move into the efficiency-driven stage as they become more competitive, productivity increases and wages rise. At this time, a country must begin to develop more efficient production processes and increase product quality, because wages have risen and they cannot increase prices.
As countries move into the final stage, i.e. the innovation-driven stage, wages will have risen to such levels that they are able to sustain those higher wages and the associated standard of living only if their enterprises are able to compete with innovative and unique products. On reaching this stage, countries must compete by producing new and different goods using the most sophisticated production processes and by applying innovation.

Are media perceptions of economic development in line with the reality?

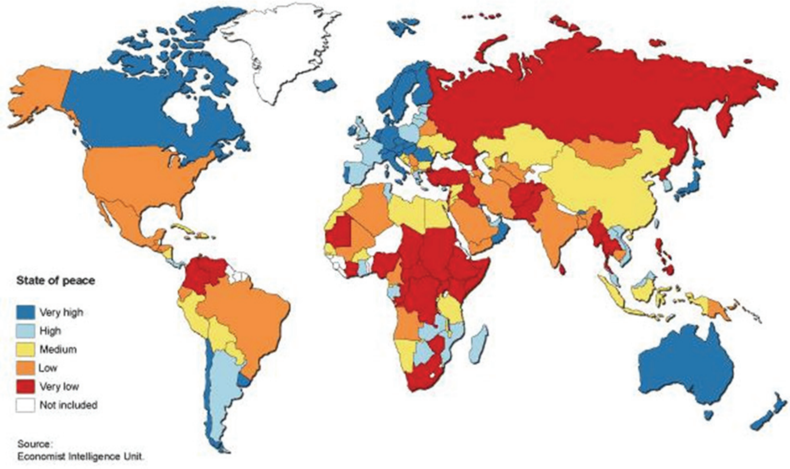
When considering the list of economies at each stage of development in the WEF Global Competitiveness Report 2010-2011, European countries, North America, Israel, the United Arab Emirates, Singapore, Hong Kong, Korea, Japan as well as Oceanic countries all fall into the third stage of development (GDP per capita in US$ is more than 17,000 and the economies are innovation driven).

Currently, no African countries fall within this developmental stage, with the majority of countries either being in stage one (less than 2, 000 GDP per capita, factor driven) or in transition from stage 1 to stage 2 (2,000 to 3,000 GDP per capita, efficiency driven). Discussion of economic trends by analysts in the media is indicative of the reality. More interest is given to continents that are considered to be highly advanced. In continents that receive much scrutiny and criticism, such as the Middle East, countries such as Saudi-Arabia as well as Israel are evaluated positively based on progressive economic development. Although Africa has a lot of business potential and room for economic development, it has a long way to go before it will be considered to be advanced.

South Africa, which has received the most international media focus relating to business and economic development, was also considered by the Global Competitive Index to be one of the most economically advanced of African countries Namibia and Mauritius, also considered to be in the second stage of development as per South Africa, received little foreign media interest. As argued earlier, reportage of Africa is influenced by the "bad news syndrome" to an extent, making it Africa's responsibility to showcase development and thereby, to enhance international perceptions of the continent. The ultimate result would be both the securing of foreign partnerships and investment and strengthening of international ties.

b) Global Peace Index for 2010

Chart 6: **State of peace according to GPI**



Source: Global Peace Report

Sometimes a picture speaks louder than words. Above figure indicates the degree to which countries are peaceful. Interestingly, with the exception of six African countries, the state of peace in Africa seems to be medium, low and mostly very low.

In light of this, the extensive focus that Africa receives relating to political conflict, violence and crime mirrors the reality. This is the case for most of the other regions, leading us to conclude that the media are not exaggerating the problems being faced.

The Global Peace Index for 2010 indicates that Sub-Saharan Africa is the region least at peace, with an average GPI score of 2.23. Media Tenor data indicates that the foreign media closely associate Sub-Sahara with political conflict and violence.

According to the GPI "four war-torn countries: Somalia, Sudan, Chad and the Democratic Republic of the Congo (DRC) continue to occupy the lowest ten positions in the index and each experienced deteriorations in their scores". Notably, these countries, especially Somalia and Sudan attract significant international media focus.

Ranked 33rd, Botswana fares best in the Global Peace Index for 2010. A reduction in the proportion of its population in jail contributed to a slight improvement in its score. Although this country's homicide rate is high, its military capability is limited and it is free of internal conflict. Low scores for most measures of safety and security point to a relatively harmonious society. Botswana also receives little foreign media interest.

2.1.4. Conclusion: Africa in Context

Africa has a lot of groundwork to do. International media portrayal of Africa is largely matched by existing global perceptions of the continent. The two issues that are central to foreign perceptions and those that mould international relations, namely the African economy and political conflict, are the issues that attract the most international media focus.

The international community is undoubtedly more focused on the many problems facing African countries. On review of the 2010 Global Peace Index, perception sadly matches reality to a greater degree. Although, the reality seems to be amplified by:

1) The fact that with the exception of South Africa, international scrutiny pertained primarily to problem areas such as Zimbabwe and Sudan.
2) The fact that there is not sufficient in-depth analysis of growing African economies.
3) The absence of positive issues to profile resulted in an intensified focus on problems.

The reputational challenges facing the continent are similar to the problems that other regions experience. For Africa to successfully enhance its international reputation, the reality needs to change.

In this section, we drew on various researches to prove that international media perceptions are mostly factually based. For Africa to enhance international perceptions and thereby, improve its reputation in the international community, the following should be addressed:

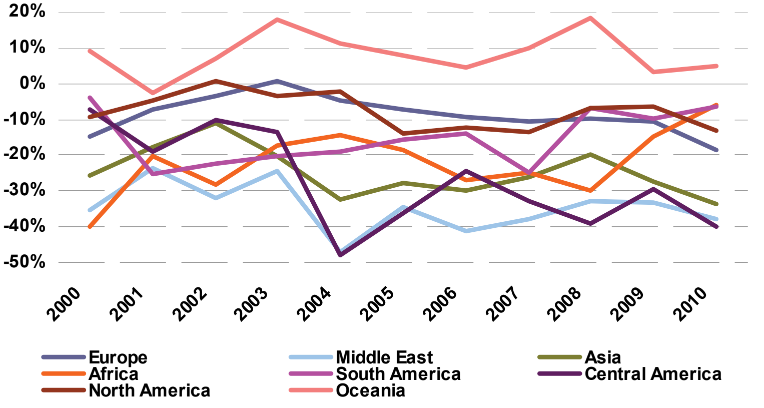
a) Africa must win back international trust. For global perceptions of the continent to improve, the international community's experience thereof must improve.
b) Nation brand expert, Simon Anholt (2010) talks about two types of trust. The first being trust gained through direct experience. The second is formed in others, which is then used as a proxy for earned trust. The media plays a pivotal role in the latter, or what Anholt calls "*trust taken on trust*". It is, to a large extent the gatekeeper of "*trust taken on trust*" and may influence perceptions ranging from the man-on-the-street to the informed elite responsible for decisions pertaining to investment.
c) For Africa to regain international trust, it must generate a new identity. To do this, its behavior has to change (Anholt, 2010). However, a new identity without change is a

> false identity. A new identity can only be achieved by changing the way that things are. The answer is simple, but there is no fast fix.

The research finds that Africa is not the only global "*problem child*". Over the past decade, other continents have withstood far more scrutiny.

Since 2008, Africa has been portrayed in an increasingly positive light, to the extent to which it received similar ratings to that of Europe, North America and South America. Increased positive interest, mostly pertaining to the successful hosting of the 2010 FIFA World Cup™ presents Africa with a window of opportunity to enhance international perceptions and strengthen foreign ties.

Chart 7: **Weighted rating trend of coverage on continents**



Basis: 648,168 reports on foreign countries in 35 analyzed TV news media 2001 - 2010

In addition, Africa has many countries that could contribute towards enhanced continental perceptions. Rapidly growing, peaceful countries such as Namibia and Mauritius have positive stories to profile, yet require the context and investment to tell these. Media Tenor's analysis indicates that the international media's negligence of such countries strengthens the negative perceptions of the continent.

If foreign interest in emerging African markets increased, perceptions of growth could change, provided that international attention is given to countries undergoing rapid growth and showing potential.

Statements such as: *As Africa gets richer and does more trade with Asia, foreign banks are becoming more interested. That was the logic cited in 2007 when China Development Bank bought a stake in Barclays, which owns a big African business, and a few months later when ICBC, China's biggest bank, bought a 20% stake in Standard Bank, South Africa's largest, which has operations in some neighbouring countries*" (The Economist, 28/08/2010) signal that dialogue pertaining to Africa is subject to change.

However, the responsibility lies with these emerging economies to evoke foreign media interest, which can be achieved by increased branding efforts. Should individual branding efforts be too costly, alternatives such as regional branding, e.g. SADC could be pursued.

The unabbreviated African story – one that mirrors both the good and bad realities - must be told.

In Part I, analysis was aimed at endeavoring to understand international perceptions of Africa, by placing the continent in a broader context. It evaluated Africa's media reputation compared to other continents, as placed against the backdrop of global media trends. Part II focuses on how individual African countries' media coverage contributes towards perceptions of Africa through the proposed African Growth Index, which will allow for the ongoing and continuous tracking of the 'performance' of African countries on the basis of the 'real' variables of the Mo Ibrahim and Doing Business Indices.

2.2. The Index: Reality vs. Perceptions

2.2.1. Introduction to the African Growth Index

In the previous section, Africa's reputation was considered within the context of general media trends. The similarities and differences existing between Africa and other continents were explored and debated. The primary aim of the African Growth Index is to identify and discuss specific African countries that impact on the continent's reputation, in terms of governance and economic development. A secondary aim is to assess whether media reportage is compatible with the reality, by comparing the Index to other research and to debate possible corrective action that could lead to enhanced foreign perceptions and subsequently, strengthened international ties.

2.2.2. Methodology

2.2.2.1. Index score calculation

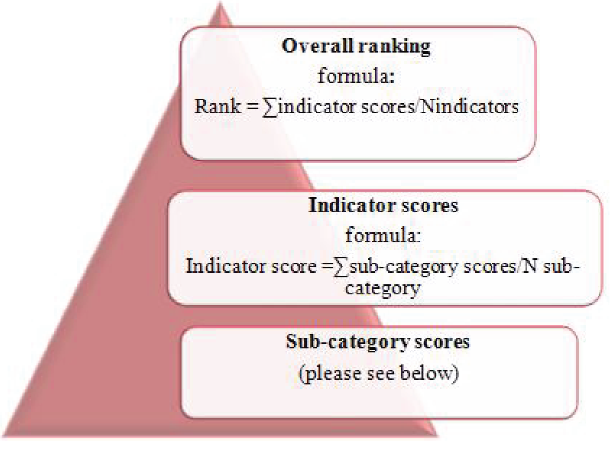
The aim of the African Growth Index is to focus on specific African countries that impact on the continent's reputation. This is done by comparing media coverage on the indicators for the 2010 Ibrahim Index of African Governance (Mo Ibrahim Foundation) pertaining to various African countries. The time period for analysis of the Index coincides with the Ibrahim Index; thus research is based on 2008 and 2009 data.

The African Growth Index measures the delivery to citizens of public goods and services, by government and non-state actors (Mo Ibrahim Foundation). It draws on four indicators: Safety and Rule of Law; Participation and Human Rights; Sustainable Economic Opportunity; and Human Development as proxies for the quality of the processes and outcomes of governance. These indicators have been leveraged in the African Growth Index. The Ibrahim Index, funded and led by an African institution (Mo Ibrahim Foundation) is the most comprehensive collection of qualitative and quantitative data that assesses governance in Africa.

To deliver a comprehensive analysis, variables measured in the World Bank Doing Business Index (Doing Business) are included as an additional assessment category. The Doing Business Project provides objective measures of business regulation and the enforcement thereof across 183 economies and selected cities at a sub-national and regional level. It assesses domestic small and medium-size companies, measuring relevant regulations. Furthermore, we have drawn on information contained in the Global Peace Index and the World Economic Forum Global Competitiveness Report (as detailed in Section 1).

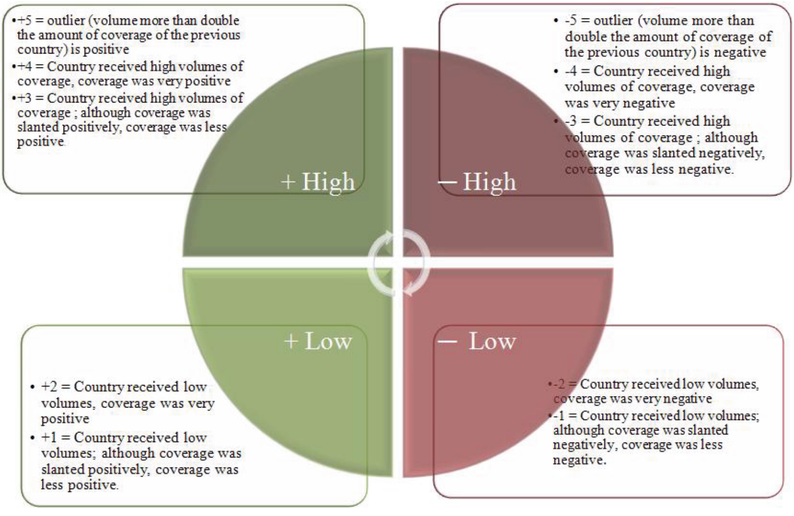
The Africa Growth Index that forms the core of this chapter relies on a ranking system comprising scores and is calculated as follows:

Diagram 1: **Methodology formula**



Each main category has a range of sub-categories, with these scores based on visibility and tone. Countries were sorted into four categories: +High (tone is positive, visibility is high); +Low (tone is positive, visibility is low); -High (tone is negative, visibility is high); and –Low (tone is negative, visibility is low). Each country was assigned a value based on criteria detailed in Diagram 2. Countries receiving five or less reports were assigned a value of 0.

Diagram 2: **Media article categorization matrix**



Countries were then allocated a score between 0 and 10, with 0 being very negative and 10 being very good.

2.2.2.2. Media included in the analysis

This Index is based on 10 774 reports sourced from the above mentioned media, for the period 1 January 2008 – 31 December 2009 (in alignment with the Mo Ibrahim Index).

Only data from foreign television media was analyzed for the Index, as the aim was to understand how African countries have been portrayed in this community of influencers. Therefore, no African media was included in the analysis. Table 2 provides the media source list.

Table 2: **Media analysis source list**

	Medium	No of reports	Weighted rating
A breakdown by media	Al Jazeera	249	-25%
	Al Arabiya	324	-12%
	TVE1 Telediario 2	385	-26%
	TF1 Le Journal	1216	-31%
	BBC World Service	1460	-21%
	Dubai TV	350	-14%
	BBC1 10o'clock	706	-40%
	SF Tagesschau	543	-24%
	ZDF Heute	249	-46%
	ITV News at Ten	127	-41%
	RAI TG1	74	-30%
	ARD Tagesthemen	267	-41%
	ZDF Heute Journal	624	-44%
	Al Manar	176	-8%
	ARD Tagesschau	401	-45%
	RTL Aktuell	252	-27%
	CNN International Desk	188	-20%
	LBC	394	-13%
	ABC World News	278	-25%
	BBC2 Newsnight	63	-51%
	NBC Nightly News	537	-22%
	FOX Special Report	713	-48%
	CBS Evening News	29	-33%
	CCTV	765	0%
	SAT.1 18:30	404	-49%

Basis: 10 774 reports, 2008/2009

2.2.2.3. Countries considered for the analysis

The selection criterion for the African Growth Index was the amount of coverage that each African country received during 2008 and 2009, an analysis period that coincides with the period of analysis for the 2010 Ibrahim Index. For a country to be considered for analysis, it had to be above the awareness threshold, i.e. the lowest number of reports that countries can receive on a regular basis to be considered as being visible in media. The countries in

Table 3 were above the awareness threshold, therefore qualifying for inclusion in the Index.

Table 3: **African Growth Index qualifying countries**

	Country	No. of reports	Weighted ratings
Countries that will form part of the index as they are above the awareness threshold	Somalia	2195	-28%
	Sudan	1673	-23%
	Zimbabwe	1054	-54%
	South Africa	896	1%
	Kenya	652	-45%
	Egypt	466	-31%
	Libya	418	-24%
	Morocco	409	-22%
	Algeria	375	-8%
	Mauritania	324	-18%
	DRC	313	-60%
	Nigeria	255	-40%
	Chad	206	-27%
	Tunisia	134	4%
	Ghana	128	31%
	Congo-Brazzaville	111	-45%
	Madagascar	96	-36%
	Guinea	79	-41%
	Comores	79	-44%
	Rwanda	62	-35%
	Ethiopia	57	-23%
	Uganda	57	-32%
	Tanzania	55	5%
	Angola	50	2%

Basis: 10 774 reports, 2008/2009

"For something to be considered news by the mass media, it has to be close to their audience, it has to involve conflict and it usually revolves around someone famous" (Renato Kizito Sesana from Africa News, Nairobi Kenia, in: Allen Jr, John L, 2000: 15). This approach has withstood the test of time and is applicable to the tensions in the Middle East, especially post-9/11. International focus on Africa proves this viewpoint to be substantive. Similarly to the Middle East, African countries most closely associated with political turmoil and violence attract the most attention. Somalia has gained increased visibility due to piracy and the political climate in both Sudan and Zimbabwe has been featured regularly in the media. Interestingly, these countries are not closely linked to economic growth, leading to the consideration that African countries are receiving substantial international attention for all the wrong reasons.

It is also worth noting that African countries portrayed negatively by the media are in stage one of development, as defined in Section 1. The fact is that conflicted countries that are not as economically advanced accrue more foreign media interest. Conversely, most countries that are considered to be more peaceful are at higher stages of economic development and those that are considered to be more business-friendly receive minimal media interest. As noted previously, this is the case for countries such as Namibia, Mauritius and Botswana.

The fact that African countries that could contribute to enhanced continental perceptions do not receive much interest is problematic as this presents the continent with less opportunity to buffer intensified negative focus and increase international awareness of positive developments. Table 4 covers those countries that could not be included in the Index due to a lack of international coverage.

Table 4: **African Growth Index, non-qualifying countries**

Countries not included in the index as they are below the awareness threshold	Cameroon	43	-5%
	Eritrea	43	-2%
	Gabon	42	-45%
	Malawi	42	-21%
	Mali	37	-35%
	Niger	36	-19%
	Senegal	29	-24%
	Sierra Leone	27	-33%
	Ivory Coast	26	-85%
	Djibouti	24	21%
	Equatorial Guinea	20	10%
	Seychelles	19	-26%
	Cape Verde	18	-44%
	Zambia	16	-19%
	West Sahara	16	-25%
	Burkina Faso	15	-60%
	Guinea Bissau	11	-100%
	Liberia	10	-20%

Basis: 474 reports, 2008/2009

<table>
<tr><td rowspan="12">Countries not included in the index as coverage on these countries is too low; these countries have less than 10 reports so the ratings are not nescasarily an accurate reflection of media opinion</td><td>Botswana</td><td>9</td><td>LNR</td></tr>
<tr><td>Lesotho</td><td>9</td><td>LNR</td></tr>
<tr><td>Mozambique</td><td>6</td><td>LNR</td></tr>
<tr><td>Gambia</td><td>6</td><td>LNR</td></tr>
<tr><td>Burundi</td><td>5</td><td>LNR</td></tr>
<tr><td>Namibia</td><td>5</td><td>LNR</td></tr>
<tr><td>Togo</td><td>4</td><td>LNR</td></tr>
<tr><td>Central African Rep.</td><td>4</td><td>LNR</td></tr>
<tr><td>Benin</td><td>4</td><td>LNR</td></tr>
<tr><td>Swaziland</td><td>4</td><td>LNR</td></tr>
<tr><td>Sao Tome & Principe</td><td>3</td><td>LNR</td></tr>
<tr><td>Mauritius</td><td>2</td><td>LNR</td></tr>
</table>

Basis: 61 Reports, 2008/2009

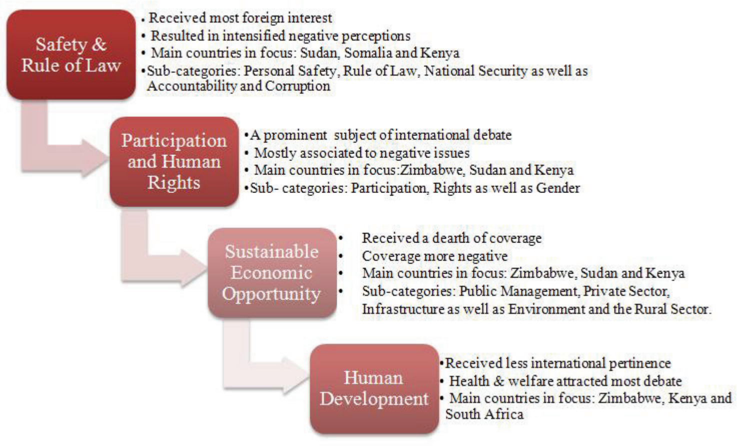
2.2.3. African Growth Index key findings

Based on the preceding section it is clear that:

1) Coverage of Africa follows a similar trend of negative reportage to that of most continents.
2) The international media are mostly interested in "*problem countries*", which are predominantly areas of conflict.
3) Of the developing world, with the exception of Asia, Africa is the continent receiving most interest relating to economic growth and opportunities. To date, South Africa has consistently received the highest level of attention. Extensive debate relating to political turmoil and conflict has a compounding impact on positive interest given to countries' business, as well as economic climate.

With these points in mind, we can discuss the main opportunities and challenges faced by Africa's countries, focusing on performance per indicator. The discussion first centers around indicators that attracted the most international focus, followed by those that received less foreign interest. We have utilized an Indicator Discussion Navigator (as per Diagram 4) to guide observations.

Diagram 4: **Summary based on the Indicator Discussion Navigator Framework**



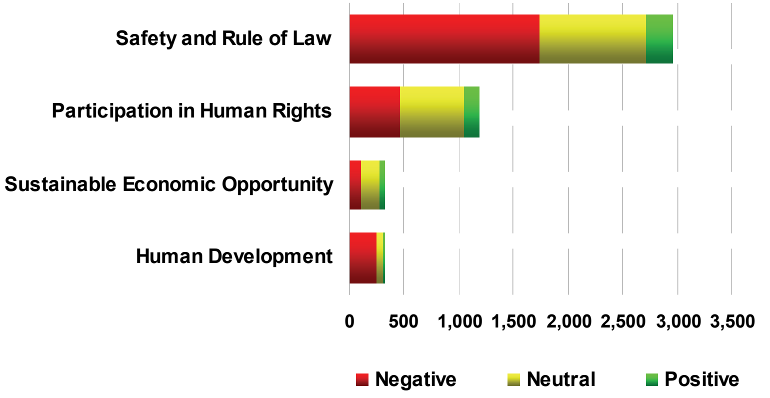
This navigator takes the amount of coverage that the indicators received, as well as international media tone into consideration.

2.2.3.1. Safety & Rule of Law

Safety and Rule of Law received the highest level of international scrutiny. This indicator measures reportage on levels of crime, social unrest, independence of a judiciary and conflict. Safety and Rule of Law also pertains to civil war in a country, as well as international tensions and war. Coverage of internally displaced people and refugees originating from specific countries also forms part of this analysis.

The fact that Safety and Rule of Law accrued the most foreign interest hardly comes as a surprise, given the fact that broader analysis of international media trends indicates that foreign media take substantial interest in conflict and violence in any given country.

Chart 8: **Tone of coverage per indicator**



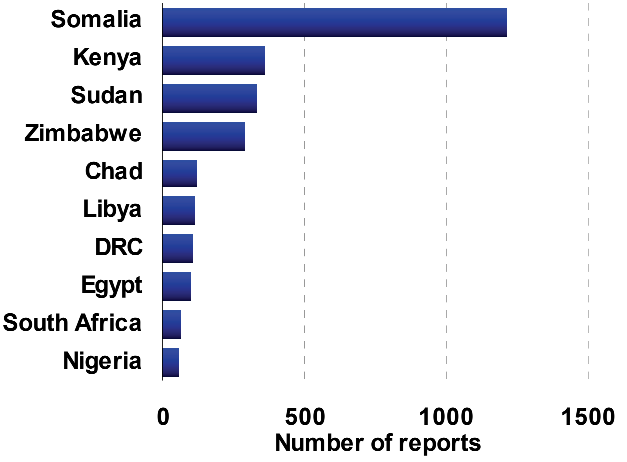
Basis: 3 357 reports in 24 television news broadcasts, 2008/2009

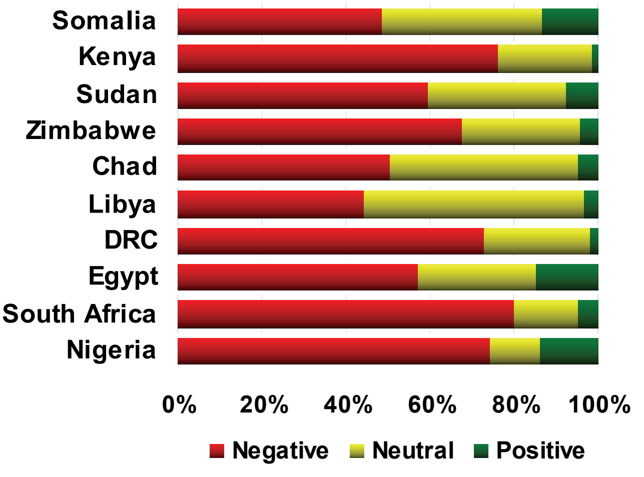
Personal Safety seems to be the greatest foreign perception driver. Not only did this issue receive the majority of international interest, but countries that performed poorly on the indicator, such as Somalia and Kenya attracted the highest levels of foreign attention. Predictably, issues that threatened to affect people from other regions such as piracy and kidnapping by Somalis, received the most focus.

Countries achieving the highest score for the indicator, such as Angola, the Comores and Ethiopia did not necessarily receive positive interest pertaining to Safety and Security. Rather, a lack of coverage on the indicator suggests that countries performing well were simply not strongly associated with the issue.

African countries considered safer and less prone to conflict and violence, such as Botswana, Namibia and Mozambique, were not only neglected by foreign media with regards to Safety and Rule of Law. These countries simply did not yield much coverage in general, reiterating that African countries more prone to political conflict and violence receive higher levels of interest.

Chart 9: **Visibility and Tone of Coverage of Top Ten Countries on Safety & Rule of Law**





Basis: 2 748 reports in 24 television news broadcasts, 2008/2009

Table 5: **Individual Country Scores* on Safety & Rule of Law**

Country	Sub-category scores				Score
	Personal Safety	Rule of Law	National Security	Accountability & Corruption	
Angola	5	5	5	5	5
Comores	5	5	5	5	5
Ethiopia	5	5	5	5	5
Ghana	5	5	5	5	5
Tanzania	5	5	5	5	5
Egypt	2	5	6	5	4.5
Guinea	3	5	5	5	4.5
Madagascar	3	5	5	5	4.5
Rwanda	5	3	5	5	4.5
Tunisia	3	5	5	5	4.5
Uganda	3	5	5	5	4.5
Mauritania	1	6	5	5	4.25
South Africa	1	5	6	5	4.25
Algeria	1	5	5	5	4
Chad	4	5	2	5	4
DRC	3	5	1	5	3.5
Morocco	3	1	5	5	3.5
Nigeria	1	5	3	5	3.5
Zimbabwe	3	2	3	5	3.25
Libya	2	1	2	5	2.5
Kenya	0	1	3	5	2.25
Somalia	0	3	0	5	2
Sudan	2	0	1	5	2

*Score is 0 -10; 0 is very negative, 5 is mediocre and 10 is very good

Thus far, Media Tenor's analysis indicates that:

1) Conflicted countries receive far higher levels of interest from the foreign media.
2) Countries scoring higher on the index are not necessarily considered to be peaceful or safe in the international media, but they received less interest relating to the issue.
3) Countries considered as being the most peaceful do not receive much interest and also do not achieve positive media appraisal pertaining to their efforts to sustain peace.

There is a strong correlation between the findings of the African Growth Index, the Global Peace Index and the Ibrahim Index in that all three indices indicate that Sudan, Somalia, Zimbabwe and

Nigeria are among the African countries considered to be least peaceful and safe. In addition, Kenya was considered to be less peaceful in the media sphere, as the foreign media placed greater emphasis on political turmoil during 2008 (post-elections held on the 27th of December 2007).

This common ground between the indices indicates that perceptions and reality reflect each other to some extent. However, the fact that countries such as Kenya and Libya (countries considered to be more safe and peaceful by the Ibrahim Index and the Global Peace Index) performed poorly in the African Growth Index signals that the media may exaggerate the extent of violence to a degree. Political discord and violence in Africa are further amplified by limited reportage pertaining to African countries considered to be more peaceful and safe.

Such reporting creates a challenging environment for Africa to communicate more positive messages. Could the foreign media deliberately be ignoring stories pertaining to more peaceful countries and focusing on countries facing problems? Could Africa engage in international debate to a larger extent so as to defuse negative perceptions, by highlighting progress made by countries such as Namibia, Botswana, Mozambique, Ghana and Egypt?

Changing the conversation is possible, but only if a change in dialogue reflects a changing reality. Although an increased focus on more peaceful countries may result in reduced negative perceptions, decreased negativity can only be sustained if other African countries follow the example of such peaceful countries. Conflict resolution is non-negotiable.

2.2.3.2. Participation and Human Rights

Participation and Human Rights was the second highest indicator under debate in foreign media. This indicator measures the degree to which African countries are associated with citizens' freedom to vote, governments' effective power to govern, as well as free and fair elections. Issues such as political rights, human rights, labor rights and freedom of expression are factored into the analysis. Gender issues are also taken into consideration.

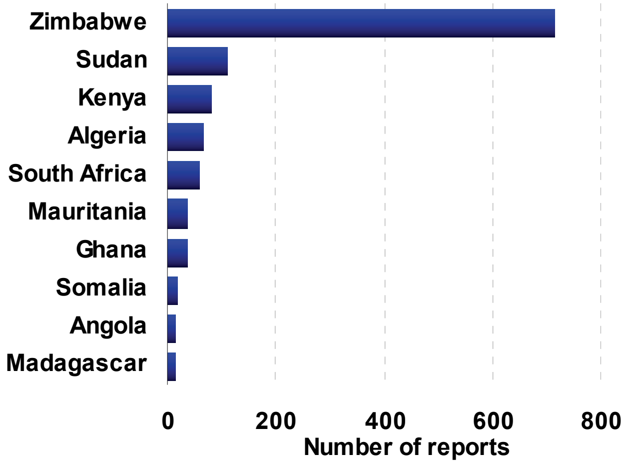
With the exception of Somalia, the countries receiving the lowest scores for Safety and Rule of Law were also the countries that attracted the most scrutiny with regards to Participation and Human Rights. This signals the emphasis placed on political conflict and subsequently, violence.

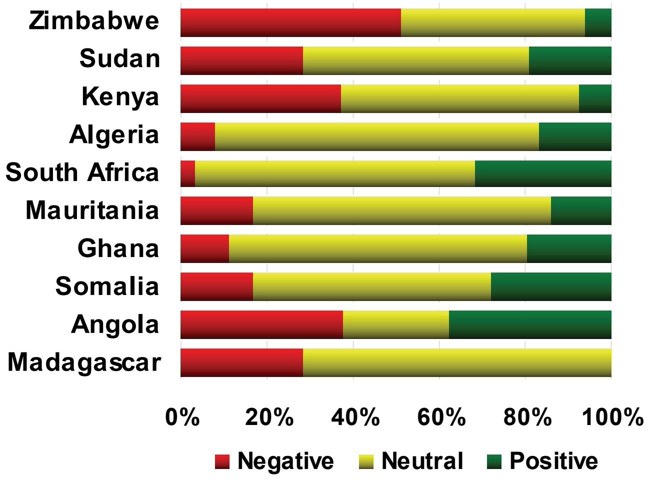
Zimbabwe, Sudan and Kenya, African countries worst affected by political tensions, received the bulk of media attention. African countries renowned for their political stability and the inroads that they have made on rights and gender issues, such as South Africa and Ghana evoked less foreign interest. Yet, both South Africa and Ghana had good stories to tell. South Africa successfully held its third democratic National Election during 2009. Ghana, having recently celebrated 50 years of independence, successfully held its Presidential Election during 2008 without any incidents.

This indicator was inherently associated with conflict. High volumes of coverage were found in the sub-category, Participation, which comprises factors such as free and fair elections (the extent to which rulers are determined by free and fair elections), political self-determination (citizens' rights to choose who they vote for) as well as governments' effective power to govern. Interestingly, minimal international coverage pertained to the issues of Gender and Rights.

Women's contributions to war and peace have long been underestimated. In fact, women often contribute to the outbreak of violence and hostilities – in many cases, they are instrumental in inciting men to defend group interests, honor, and collective livelihoods. Women also play a key role in preserving order and normalcy in the midst of chaos and destruction. In times of conflict, when men engage in war and are killed, disappear or take refuge outside their country's borders, it is women who are left with the burden of ensuring family livelihood. Women struggle to protect their families' health and safety –a task which rests on their ability to cope pragmatically with change and adversity. It is therefore not surprising that women are also a driving force for peace (Sorensen, 1998: iii).

Chart 10: **Visibility and Tone of Coverage of Top Ten Countries on Participation & Human Rights**





Basis: 1 149 reports in 24 international television news broadcasts, 2008/2009

Various scholars have connected gender to conflict. Nzomo (2002) illustrated the important role that women play in the establishment of peace:

Women's under-representation or lack of involvement in official efforts at resolving internal state conflicts is taken as a given in most situations. While they often bear the brunt of the war brutalities, and are increasingly involved in combatant activities, they are seldom part of the inner circles of peace negotiations, peace accords, or policies at the formal level to resolve conflict (Boyd, 1994: 3).

If it is apparent that women are the driving force for peace, and if women’s lack of involvement in efforts to resolve state conflicts is a given, why isn’t the issue being given the media attention that it deserves? Are African stakeholders doing enough to emphasize the active role that women play and the contribution that women make in the establishment of peace?

Furthermore, if women are a part of the solution for the problem of conflict, and if gender issues are under reported, this may indicate that the media are problem-orientated instead of solution-driven. It could even be argued that the international media strive to sustain dominant discourses of Africa as being a deeply conflicted continent.

From the above arguments, we can deduct that:

1) The media link issues of Personal Safety to Participation and Rights.
2) The primary focus pertained to elections that were not considered free and fair.
3) The media may be more problem-focused than solution orientated.

On review of the data, one gets the impression that foreign portrayal of Participation and Rights could be skewed. As argued previously, the media closely link Safety and Rule of Law with Participation and Rights. Subsequently, political strain and conflict underlies the tenor of reportage on Participation and Rights.

Table 6: **Individual Country Scores* on Participation & Human Rights**

Country	Sub-category scores			Score
	Participation	Rights	Gender	
South Africa	9	5	5	6.33
Algeria	8	5	5	6.00
Mauritania	8	5	5	6.00
Ghana	7	5	5	5.67
Morocco	7	5	5	5.67
Somalia	7	5	5	5.67
Tunisia	6	5	5	5.33
Angola	5	5	5	5.00
Chad	5	5	5	5.00
Comores	5	5	5	5.00
DRC	5	5	5	5.00
Egypt	5	5	5	5.00
Ethiopia	5	5	5	5.00
Guinea	5	5	5	5.00
Libya	5	5	5	5.00
Nigeria	5	5	5	5.00
Rwanda	5	5	5	5.00
Tanzania	5	5	5	5.00
Uganda	5	5	5	5.00
Madagascar	4	5	5	4.67
Sudan	8	0	5	4.33
Kenya	2	5	5	4.00
Zimbabwe	0	5	5	3.33

*Score is 0 -10; 0 is very negative, 5 is mediocre and 10 is very good

The Ibrahim Index however reflects a different situation altogether. Not only were the countries that obtained high scores for this indicator neglected in the media, but the countries performing the poorest on the Participation and Rights indicator differed to the countries identified in the African Growth Index. Whereas the Ibrahim Index was most concerned about immigrants' situation in Libya (Mo Ibrahim Foundation), the media neglected the issue to a large extent. According to the Ibrahim Index, human rights in Equatorial Guinea left much to be desired as abductions, torture and executions under the pretence of justice was seen as being common place in the country (Mo Ibrahim Foundation).

The fact that foreign media representation and reality do not match as closely in the case of Participation and Human Rights presents Africa with a window of opportunity to enhance international perceptions. A discord between international coverage and studies such as the Ibrahim Index signals that there is no clear-cut messaging on the issues pertaining to the indicator. Therefore, conversations are more fluid and stereotypes are perhaps not as entrenched. Increasing international awareness of successes such as South Africa's constitution and increased participation in global discussion pertaining to the significance of women in any given region may enhance international perceptions.

2.2.3.3. Sustainable Economic Opportunity

If Africa successfully demonstrates that it is a competitive player in the global economy, perceptions of the continent would be transformed. Belief in the continent's ability is growing. Maria Ramos, CEO of ABSA, one of South Africa's biggest banks was recently quoted as saying that "*Africa could be the next Asia*" (Moneyweb, 17/11/2010).

She went on to say, "…but labour, goods and finance needs to move more freely within the continent than is the case". And that is a big "but", especially considering media coverage of the African economy.

As previously indicated, South African coverage comprised over 85% of total coverage and coverage pertaining to the country, as is the case for the other African countries, was primarily commodity-driven. This means that there is no coherent African Economic Growth story. Ramos argues that "(African countries) need to expand beyond being just an exporter of resources", citing infrastructure and cooperation with the outside world as two potential contributors to growth throughout the continent.

When analyzing coverage on Africa, it is evident that it is not perceived by the rest of the world as the ‘next Asia’. Only a sliver of coverage spoke to issues of Sustainable Economic Opportunity.

This indicator is divided into four categories, namely Public Management, Private Sector, Infrastructure, Environment and the Rural Sector. Public Management measures how foreign media debate the extent to which governments are structured to design and implement policies, as well as the level of service delivery. The quality of budget management and the management of public debt are also considered. Other key variables include the debt-service ratio, import cover, statistical capacity, inflation, and fiscal policy and consumer prices. The Private Sector indicator covers variables such as competitive environment, competition, unfair competitive practices, investor relations as well as bureaucracy and red tape. Environment and the rural sector pertain to environmental sustainability, environmental policies, agriculture, rural development and rural financial services, as well as the dialogue between governments and rural organizations.

Not only did the continent receive low levels of coverage pertaining to Sustainable Economic Opportunity, but coverage was also more negatively slanted (it received a weighted rating of -19%).This is a red flag, a signal that foreign debate mostly pertained to problems associated with economic opportunity. This is reflected in the countries receiving high levels of interest, with the top three countries also being closely associated with political tension and conflict.

Table 7: **Individual Country Scores* on Sustainable Economic Opportunity**

Country	Sub-category scores				Score
	Public Management	Private Sector	Infrastructure	Environment and the Rural Sector	
Libya	6	7	5	5	5.75
Algeria	6	5	5	5	5.25
DRC	5	5	5	7	5.50
Angola	5	5	5	5	5.00
Chad	5	5	5	5	5.00
Comores	5	5	5	5	5.00
Egypt	5	5	5	5	5.00
Ethiopia	5	5	5	5	5.00
Ghana	5	5	5	5	5.00
Guinea	5	5	5	5	5.00
Madagascar	5	5	5	5	5.00
Mauritania	5	5	5	5	5.00
Nigeria	5	5	5	5	5.00
Rwanda	5	5	5	5	5.00
Somalia	5	5	5	5	5.00
Tanzania	5	5	5	5	5.00
Tunisia	5	5	5	5	5.00
Uganda	5	5	5	5	5.00
South Africa	5	5	5	4	4.75
Morocco	5	5	5	3	4.50
Kenya	5	5	5	1	4.00
Sudan	2	5	5	4	4.00
Zimbabwe	0	0	5	5	2.50

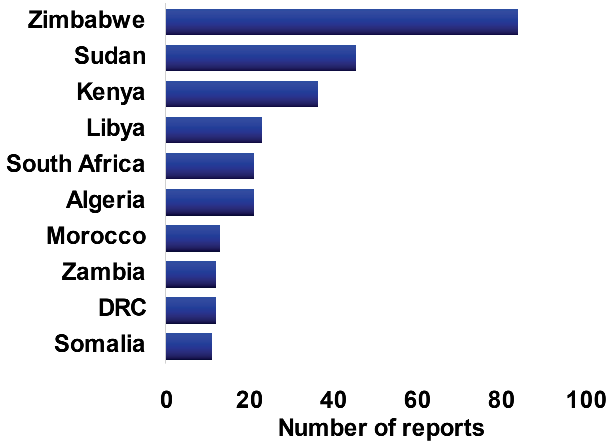
*Score is 0 -10; 0 is very negative, 5 is mediocre and 10 is very good

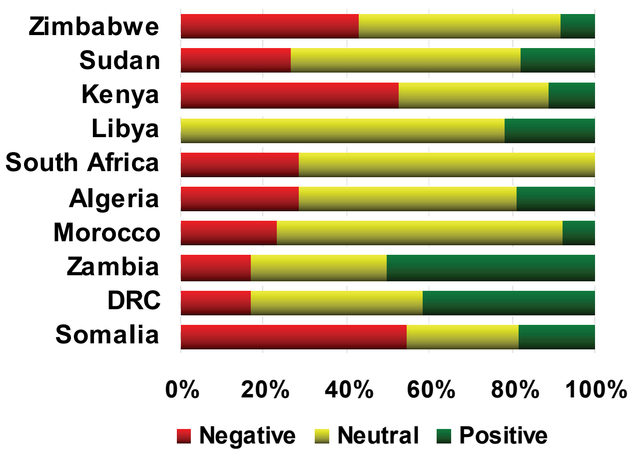
It is clear from the analysis that:

1) Africa does not have a coherent African Growth story; coverage is fragmented and commodity-driven.
2) There is a problematic lack of coverage on topics related to Sustainable Economic Opportunity.
3) What little coverage that exists on issues that could contribute to enhanced positive perceptions, is mostly negative.

African countries are not at advanced stages of economic development, which could lead to the argument that they do not warrant as much media consideration. However, as a continent comprising 54 emerging economies, Africa needs to attract foreign investment. Enhanced international perceptions are a must for the continent's financial growth, as Maria Ramos says, *"(Ramos) warned against* *protectionism, saying the most successful countries in history had not closed themselves off to the outside world*" (Moneyweb, 17/11/2010).

Chart 11: **Visibility and Tone of Coverage of Top Ten Countries on Sustainable Economic Opportunity**





Basis: 278 reports in 24 international news broadcasts, 2008/2009

The BRIC factor

Could South Africa's joining of BRIC create an opportunity for Africa to get a more solidified story of 'African Growth' across? Analysts seem to think so. Xinhua (09/01/2011) reported that "South Africa's recent admission to BRIC, which grouped Brazil, Russia, India and China, would not only benefit both sides, but boost the African continent's voice across the world". However, for South Africa and Africa to fully benefit from representation, the objectives for joining BRIC and a clear message of economic growth must be communicated.

South Africa has already come under criticism in this regard. The Mail & Guardian argues:

Amid South Africa's apparent diplomatic triumph a number of questions remain unanswered about the purpose and benefit of positioning the country within the BRIC grouping. It is not clear what South Africa's motivation for joining the group is and what it seeks to gain from its membership. It is not evident what South Africa's strategy to the BRIC is and how this fits into the country's wider global strategy (07/01/2011).

Although South Africa's entry into BRIC has the potential to magnify Africa's voice in the world, the continent must demonstrate that it is ready to go beyond the export of goods. It has to communicate its growth and developmental goals.

2.2.3.4. Human Development

To turn foreign dialogue pertaining to 'African Growth' around, human development is imperative. This indicator pertains to health and welfare issues such as the TB and HIV/AIDS infection rates, HIV/AIDS prevention and treatment, child mortality, welfare policies, poverty alleviation, access to clean water as well as sanitation. Education issues such as the quality of education, primary school completion rate, progression to secondary school and access to tertiary education also forms part thereof.

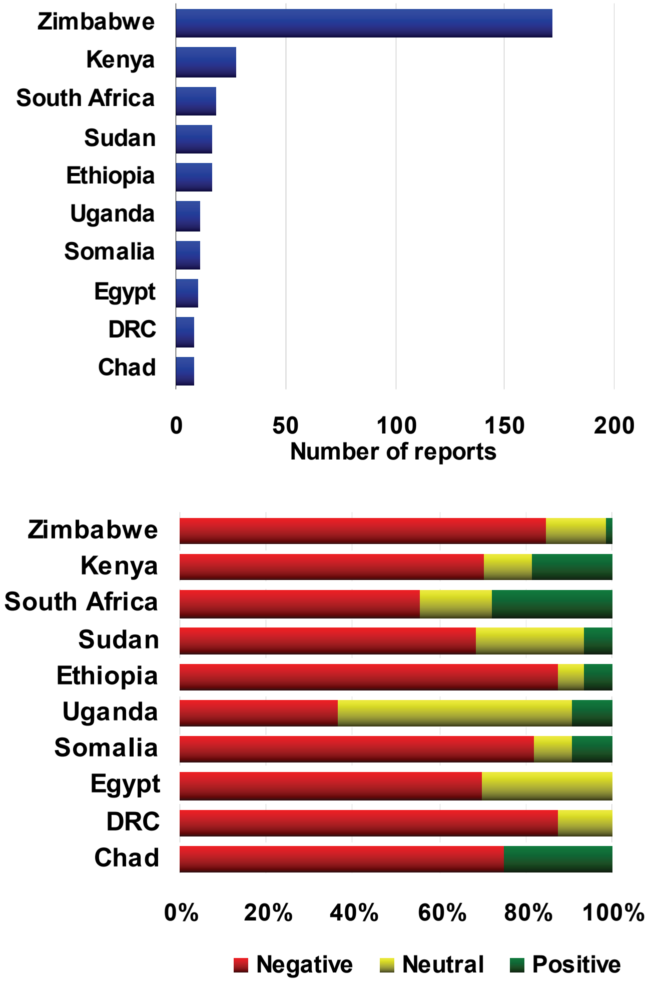
Poverty alleviation and education are particular issues of concern that could hamper enhanced foreign perceptions of the continent's growth. Ramos notes that education is central to the African economy's progress, stating, "While some might view Africa's young population with concern… provided with the right education and skills, it could in future become a competitive advantage as other continents battled with ageing populations" (Moneyweb, 17/11/2010). Implicit in this statement is that education is needed to better the African economy. What is perhaps not stated here, but which carries equal importance is the fact that even if Africa successfully communicates 'African Growth' goals, achievements and progress, development cannot be seen to be taking place in only one area. The progress must be well rounded, spanning from Sustainable Economic Opportunity to Safety and Rule of Law, as well as Human Development.

Negative coverage within this indicator is rather telling of the existing dominant media discourses, which are, according to Media Tenor analysis, that the TB and HIV/Aids situation in Africa are dire. In addition, people do not have access to clean water and proper sanitation and the prominent story is one of poverty. These issues seem to be linked back to political turmoil and conflict. One often comes across news pieces describing the plight of citizens in a given area that is riddled with conflict. One such an example is a news piece by The Australian Broadcasting Corporation (28/12/2007) in which it was reported that:

The crisis in Zimbabwe has turned into an economic and humanitarian catastrophe. Millions of people have left the country, fleeing persecution, while most of those who remain are struggling to feed themselves… The whole system is collapsing. Every aspect of the economy, of the infrastructure. The lack of … the living standards for ordinary people have dropped dramatically. It's very hard to get electricity, water, food, fuel… Unemployment is climbing towards 90 per cent, while average life expectancy has fallen to the mid-30s.

Minimal coverage pertaining to education indicates how foreign perceptions are built on news of political conflict, and that discussion of Human Development ties in with perceptions of African nations faced with political strife. Education is a solution-centered issue that could enhance perceptions of Africa. One must therefore ask, is Africa not doing enough in terms of education, or are positive developments not communicated efficiently?

Chart 12: **Visibility and Tone of Coverage of Top Ten Countries on Human Development**



Basis: 297 reports in 24 international news broadcasts, 2008/2009

Table 8: **Individual Country Scores* on Human Development**

Country	Sub-category scores		Score
	Health and Welfare	Education	
Morocco	6	5	5.50
Algeria	5	5	5.00
Angola	5	5	5.00
Comores	5	5	5.00
Kenya	5	5	5.00
Libya	5	5	5.00
Madagascar	5	5	5.00
Nigeria	5	5	5.00
Rwanda	5	5	5.00
Tanzania	5	5	5.00
Tunisia	5	5	5.00
Uganda	4	5	4.50
Chad	3	5	4.00
DRC	3	5	4.00
Egypt	3	5	4.00
Ghana	3	5	4.00
Mauritania	3	5	4.00
Somalia	3	5	4.00
South Africa	2	5	3.50
Ethiopia	1	5	3.00
Guinea	1	5	3.00
Sudan	1	5	3.00
Zimbabwe	0	5	2.50

*Score is 0 -10; 0 is very negative, 5 is mediocre and 10 is very good

Interestingly, the countries scoring high on the Human Development indicator for the Ibrahim Index received little international focus. Plus, countries scoring relatively high on the Ibrahim Index and which could be considered for analysis, such as South Africa, Egypt and Ghana did not perform as well in the African Growth Index as they had done in the Ibrahim Index. Countries receiving the highest score for this indicator received a paucity of coverage.

This further accentuates the fact that the foreign media tend to hone in on problems and that for a positive message to be communicated on this issue, Africa will have to communicate it.

In the preceding text it was argued that:

1) Human Development is often linked to Personal Safety.
2) Progress made with regard to Sustainable Economic Growth has to be accompanied by enhanced Human Development.
3) The argument that the foreign media are generally problem-centered and not solution-orientated is strengthened by the limited coverage pertaining to Education, which is a solution-focused issue.

For the rest of the world to take African growth and development seriously, Africa will have to apply substantial focus to and investment in Human Development. This is undoubtedly an issue closely associated with the economic well-being of Africa, and if neglected, could further perpetuate existing negative perceptions.

2.2.4. Pertinent Points

With the overwhelming majority of Africa's coverage being negative, analysis of foreign media reportage indicates that the continent is vulnerable to the "*bad news syndrome*". Most of this media community's focus pertains to political discord and conflict. Countries scoring the lowest on the Index were also those that received the highest levels of international interest.

But are media trends changing? The difference in scores pertaining to the period of analysis and data for 2010 indicates that this may be the case. Whereas six countries received an increased negative focus, 13 countries attracted more optimistic reportage.

The countries receiving the most scrutiny, especially relating to political conflict and violence, all saw a heightened positive focus during 2010, especially Zimbabwe and Kenya. Either the negative issues are in the process of being resolved in these countries or the media have become tired of reporting on the problems. In the case of Zimbabwe, negative realities persist. President Mugabe recently warned that all 400 "British companies" in the country could be totally nationalized if European sanctions were not removed (Phiri, 2010). Human Rights Watch issued a report accusing President Mugabe's ZANU-PF party of tapping proceeds from the elicit sale of diamonds from the Marange field to fund its campaign for the 2011 elections (Jonga Kandemiiri, 2010).

It seems as if most negative reportage on Kenya pertained to the post-election crisis at the beginning of 2008, which has shifted to a focus on its economy in 2010. Issues such as the Kenyan Parliament's decision to withdraw from the International Criminal Court treaty during December 2010 (Wambui, 2010) and the country's interference in the Ugandian elections (Reuters, 2010) threatens to evoke increased scrutiny.

Although Sudan and Somalia achieved better scores during 2010, these countries still did not perform well on the African Growth Index. International interest continues to hone in on the conflict in Dafur (Wheeler, 2010) as well as food shortages brought about by conflict and drought (Reuters, 2010). Conflict and piracy are still central to reportage on Somalia (DeCapua, 2010).

In terms of star performers that were portrayed positively by international press, there were no countries performing extremely well on the African Growth Index. Those ranked highest received less scrutiny relating to the different indicators. Notably, countries that achieved higher scores did not necessarily contribute to enhanced perceptions; rather, they received too little coverage on certain indicators and subsequently, media opinion pertaining to these countries could not be determined.

The fact that Algeria and Angola's scores decreased during 2010 indicates that the countries achieving the best scores are just as much at risk of intensified scrutiny. Increased scrutiny pertained to Algeria with regard to Safety and Rule of Law after the national police chief was shot dead during a row with a subordinate (Jamaica Obserever, 2010). The killing of three Togolese football players in Angola during the African Cup of Nations tournament prompted headlines such as ”Angola shooting shatters peaceful façade” (Bridgland, 2010).

South Africa is a good example as to why it is important for governments to focus on the pillars of growth, namely safety and security, participation and rights, sustainable economic opportunity and human development. Despite the successful hosting of the 2010 FIFA World Cup™, South Africa’s score decreased during 2010, indicating that hosting such a mega-event may not have a lasting impact on overall perceptions. Issues such as the civil servant strike during August 2010, the nationalization of mines debate and the proposed media tribunal were just some of the issues that undid the positive effects of the World Cup.

The Globe and Mail (19/08/2010) argued that “*the national strikes (were) jeopardising South Africa’s reputation and eroding the gains made during the World Cup*”.

Table 9: **Overall results of the African Growth Index**

Country	Safety & Rule of Law	Participation & Human Rights	Human Development	Sustainable Economic Opportunity	2008-2009 Score/100	Rank	2010 score /100	Difference
Algeria	4	6.00	5.00	5.25	50.00	1	47.69	-2.31
Angola	5	5.00	5.00	5.00	50.00	1	46.92	-3.08
Comores	5	5.00	5.00	5.00	50.00	1	50.00	0.00
Ghana	5	5.67	4.00	5.00	50.00	1	50.00	0.00
Tanzania	5	5.00	5.00	5.00	50.00	1	50.00	0.00
Tunisia	4.5	5.33	5.00	5.00	49.23	2	50.00	0.77
Mauritania	4.5	4.67	5.00	5.00	48.46	3	46.15	-2.31
Rwanda	4.25	6.00	4.00	5.00	48.46	3	50.77	2.31
Madagascar	3.5	5.67	5.50	4.50	47.69	4	50.00	2.31
South Africa	4.5	5.00	4.50	5.00	47.69	4	43.08	-4.62
Uganda	4.25	6.33	3.50	4.75	47.69	4	46.92	-0.77
Egypt	4.5	5.00	4.00	5.00	46.92	5	48.46	1.54
Ethiopia	3.5	5.00	4.00	5.50	46.92	5	48.46	1.54
Morocco	4.5	5.00	5.00	5.00	46.15	6	46.15	0.00
Chad	2.5	5.00	5.00	5.75	45.38	7	49.23	3.85
DRC	5	5.00	3.00	5.00	45.38	7	46.15	0.77
Guinea	4.5	5.00	3.00	5.00	45.38	7	50.77	5.38
Nigeria	3.5	5.00	5.00	5.00	45.38	7	44.62	-0.77
Libya	4	5.00	4.00	5.00	44.62	8	50.77	6.15
Somalia	2	5.67	4.00	5.00	40.77	9	43.08	2.31
Kenya	2.25	4.00	5.00	4.00	36.15	10	50.77	14.62
Sudan	2	4.33	3.00	4.00	33.08	11	36.15	3.08
Zimbabwe	3.25	3.33	2.50	2.50	29.23	12	44.62	15.38

According to the Australian Broadcast Corporation (25/09/2010) international investors had been unnerved by talk of the government taking control of the mining industry. The international media were most critical of the proposed new media law, likening it to that of censorship of the apartheid era or Robert Mugabe's Zimbabwe. To this effect, foreign media reported: "*Nelson Mandela's appearance at last month's World Cup final was the acme of a tournament hailed as an organisational triumph, a defining moment in national self-esteem and a repudiation of centuries-old "Afro-pessimism". Commentators said that the question was not whether South Africa deserved the World Cup, but whether the World Cup deserved South Africa. Which makes it all the more dismaying, just seven weeks later, to see a country once more at unease with itself*" (The Observer, 29/08/2010). So here is the bottom line. A country cannot be reliant on big events to change its reputation. Such events must be accompanied by a change in behavior and governance to deliver a meaningful and sustained impact on perceptions.

South Africa's inclusion into BRIC could present African markets with an opportunity to enhance their standing in the global economy, however, this can only be achieved if African countries can formulate a clear 'African Growth' message, if its countries are less prone to political conflict and violence and can demonstrate improved human development, especially in terms of education.

2.2.5. Conclusion

Only countries above the awareness threshold could be included in the African Growth Index. It was interesting to discover that countries regarded as being more economically advanced and peaceful, such as Namibia, Botswana and Mauritius received minimal coverage and subsequently, were excluded from the analysis.

Overall, limited coverage on better performing countries, combined with the inherently high levels of media interest on countries plagued with political strife and violence set the stage for challenging international perceptions and established the tone of the index. It became apparent that non-African audiences were especially concerned with political conflict on the continent, which impacted on the analysis of all indicators.

In unpacking the perceptions and realities surrounding the indicator of Sustainable Economic Opportunity, it became clear that a centralized effort in terms of 'African Growth' is needed. The notion of Africa changing dominant discourses pertaining to the continent, by focusing foreign interest on its growth potential, its goals for development as well as inroads being made is viable, considering that the international community has not, to date, focused extensively on such issues, and coverage on the African economy has been commodity-driven. However, sustained interest in this 'African Growth' could only be successful if African leaders and stakeholders collaborate to formulate one clear message.

An 'African Growth' Strategy would need to encompass not only Sustainable Economic Opportunity, but Safety and Rule of Law, Participation and Human Rights as well as Human Development. With the analysis clearly pointing to the degree to which foreign perceptions of Africa rely heavily on international reportage on political turmoil and conflict, these factors are interdependent. Take Zimbabwe, for example. The political conflict that the country has faced during the past decade not only impacted negatively on perceptions of the country's political stability, but also resulted in intensified focus on the subsequent ailing economy, freedom of expression in the country, Zimbabweans' rights to free and fair elections, the scarcity of food and clean water, as well as lowered life expectations.

Maria Ramos asserted that for Africa to grow, "labour, goods and finance would need to move more freely within the continent than was currently the case". This argument hints at an issue deserving some consideration: African countries need to work together to a greater extent. Only when this happens, can more developed African countries aid the economic enhancement of less developed countries. More fluidity amongst African countries could also result in greater political influence; if this is the case, other African countries could successfully mediate peace negotiations in conflicted countries and exert greater control in areas in which conflict has had a debilitating effect.

International dialogue relating to Africa can only change if the reality changes fundamentally. For this to happen, African countries need to abide by a strict code of conduct when it comes to political ethics, rooting out of corruption, sharpening up of defense policies and implementing such policies effectively. An intensified focus on healthcare, the alleviation of poverty, access to food and clean water, as well as education is critical. Only once these issues are addressed, or at least clear goals are agreed to and the appropriate actions put in place, will Africa be able to successfully change conversations and thereby, impact the news agenda on all things African.

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3. Africa's Economic Prospects

3.1 Africa from the Bottom Up. Cities, Economic Growth, and Prosperity in Sub-Saharan Africa by the Monitor Group

During the recent global financial crisis, growth rates in sub-Saharan Africa (SSA) declined to less than two percent following an unusually robust period between 1995 and 2007 during which they averaged five percent. Amid signs of incipient recovery, SSA's long-term development trajectory remains uncertain: will the region resume healthy growth, or will its well known political, economic, and social challenges hold it back yet again?

Most commentary on prospects for SSA has been relentlessly negative, citing political fragmentation, poor governance, rampant corruption, endemic conflict and disease, and other serious problems that thwart progress. The minority of more hopeful commentators have been disappointed repeatedly in the decades since independence, with hope turning to frustration and despair as dictators overturned democratic regimes, civil conflicts devastated societies, and aid money has been squandered. Meanwhile, poverty and disease remain endemic. For each step forward, it seems, there are often two steps back.

In its report, *Africa from the Bottom Up*, Monitor takes a different view, acknowledging SSA's very real problems but also pointing out sustained structural reasons why this time, at last, a better outcome may be in the offing. Drawing on its long experience in SSA, as well as its understanding of the sources of global economic prosperity and the drivers of regional economic competitiveness, Monitor focuses on four cities (Johannesburg, Lagos, Nairobi, and Dakar) and ten countries (Angola, Botswana, Ethiopia, Ghana, Kenya, Mali, Nigeria, Senegal, South Africa, and Uganda) chosen for the contrasting and complementary patterns of economic development and their distinctive geographic and cultural variety. The report argues that SSA's growth before the downturn was a sign of healthy and increasingly diverse development — growth we expect to resume with the recovery of the global economy. The subcontinent is becoming more prosperous despite its obvious challenges, as cities and competitive urban clusters lead the way. SSA's fortunes are building from the bottom up.

The Role of Cities

This pattern of bottom-up development indicates that the economic future of SSA is more connected to the success of its cities, and the competitive clusters based there, than to its nation states. Cities today generate most of the subcontinent's wealth, with many thriving despite obvious challenges. Rapid urbanization turbocharges economic growth and diversification, enhances productivity, increases employment opportunities, and improves standards of living.

Throughout history, cities have been engines of economic growth. This was true in ancient Athens and Rome, in Renaissance Florence and Venice, in industrializing London, Berlin, New York, and Tokyo, and in Shanghai and Bangalore today. Cities bring people together to transact business and share ideas; they provide enabling infrastructure such as offices, power, transportation, and telecommunications; most importantly, perhaps, they concentrate talent, innovation and entrepreneurship in a single location to create competitive economic clusters. All these are vital for economic development and improving competitiveness.

Through the lens of regional competitiveness, Monitor focused on three critical areas for the development and future prosperity of SSA's cities and competitive urban clusters: upgrading infrastructure, cultivating human assets and attracting foreign direct investment.

The Fundamental Imperative to Upgrade Infrastructure

Compared to the regional leader (Mauritius), poor infrastructure in SSA is estimated to reduce economic growth by an average of 4.7 percent. Sufficient transport networks, a reliable power supply, clean, reliable drinking water and sanitation, and fast, extensive telecommunications services all attract commerce to a city and foster the growth and development of local industries and sectors. Without these, SSA will not fulfill its economic potential, as local ventures struggle to grow and foreign businesses locate their operations in other regions with better services and lower costs.

Currently, too few resources are being channeled into building the infrastructure that will provide the foundations for globally competitive city-clusters in SSA: the infrastructure spending deficit in the region's cities has reached $75 billion annually (see Table 1). Moreover, this investment shortfall appears to be widening to the extent that it is undermining sustainable long-term growth.

This shortfall has largely arisen from the impoverished condition of many SSA countries. Poor economic management, increasing reliance on international aid, and mounting national deficits, have all conspired to limit government budgets for development infrastructure, which in some poorer countries needs to reach 20 percent of GDP.

Governments are thus turning to the private sector – either to form public-private partnerships, or by privatizing utilities and services – to develop much-needed infrastructure and spur economic development.

Table 1: **Infrastructure spending needs for sub-Saharan Africa**

US$ billion per year			
	Capital expenditure	Operations and maintenance	Total spending
ICT	0.8	1.1	1.9
Irrigation	0.7	-	0.7
Power	23.2	19.4	42.6
Transport	10.7	9.6	20.3
Water & sanitation	2.7	7.3	10
Total	38.1	37.4	75.5

Source: Vivien Foster, "Africa Infrastructure Country Diagnostic," Executive Summary. Note: Figures refer to investment (except public sector) and include recurrent spending. Public sector covers general government and nonfinancial enterprises.

The Vital Importance of Cultivating Human Assets

Economic prosperity in a global, knowledge-based economy is not solely derived from natural resources and agricultural commodities, which today account for nearly all of SSA's wealth. Rather, the source of sustainable economic prosperity is human assets working in productive and value-adding companies and sectors.

SSA's economic future lies with its peoples, who are enhancing their skills and knowledge as entrepreneurs, managers, and workers in existing and emerging competitive clusters.

While aggregate statistics on human development in SSA make for dismal reading, they obscure many signs of progress: strong and emerging sectors are attracting and training the talent they need to grow; there are a growing number of African-owned companies in banking, ICT, entertainment and consumer goods; and African-owned companies that did not exist 20 years ago now employ many thousands of people.

Attitudinal and cultural variables are often more important than policy in promoting and ensuring the success of entrepreneurship and prosperity. The peoples of SSA, especially in the cities, apparently manifest critically important attitudes and beliefs fundamental to long-term economic growth and competitiveness, regardless of whether they work in the formal or informal economy. These attitudes and beliefs include, for example, willingness to take risks (even if only from necessity); understanding the value of education and training to advancement; and appreciating the benefits of living in a modernizing economy that opens access to new technologies, products and services.

Patterns of income distribution and consumption clearly demonstrate that many SSA cities are home to an emergent and growing middle class, estimated at approximately 350 to 450 million people throughout Africa, or 35 to 45 percent of the population. MNCs such as Coca-Cola, Procter & Gamble, Unilever, Heineken, Sony, and LG view this emerging middle class as a significant opportunity.

The African diaspora also represents a set of potential financial and human assets that has only begun to be tapped. Remittances already account for a larger share of gross national income than foreign aid in many countries. Because they flow directly to users, remittances are a key source of funds for consumption and investment (see Table 2).

Ideas and talent are remitted as well as money. In Nigeria and Kenya, for example, “re-pats” (returning emigrants) are seeing new opportunities in their home countries and returning in significant numbers as entrepreneurs and social entrepreneurs to contribute to financial services, telecommunications, entertainment, and other sectors.

Table 2: **Emigration and remittances from selected SSA countries, 2005**

INDICATOR	ANGOLA	BOTSWANA	ETHIOPIA	GHANA	KENYA	MALI	NIGERIA	SENEGAL	SOUTH AFRICA	UGANDA
Annual Emigration (Thousands)	522.9	37.8	445.9	906.7	427.3	1,213	836.8	463.4	713.1	154.7
Remittances (US$M)	NA	125	174	99	805	177	3,329	633	658	423

Source: World Bank, Migration and Remittances Factbook, 2008, http://econ.worldbank.org/WBSITE/EXTERNAL/EXTDEC/EXTDECPROSPECTS/0,,contentMDK:21352016~menuPK:3145470~pagePK:64165401~piPK:64165026~theSitePK:476883~isCURL:Y,00.html.

The experience of many other nations – India, China, Russia, the Philippines, Mexico, El Salvador, Greece, and Israel, to cite a few examples – shows émigré communities to be valuable assets to the home country. These communities provide significant financial support, advice and assistance, and connections to relevant international networks.

The Critical Role of FDI

Achieving economic prosperity of course requires investment, which comes in many forms. Among these, FDI brings with it multiple benefits in a globalizing economy: money, ideas, talent, and connections to the wider world. It often is the single most effective source of investment in contributing to economic growth, strengthening companies and sectors, and increasing employment and incomes. In the case of Africa, FDI originates not only outside the continent but also, increasingly, within it as more advanced economies themselves invest in Africa's future beyond their own borders (see Table 3).

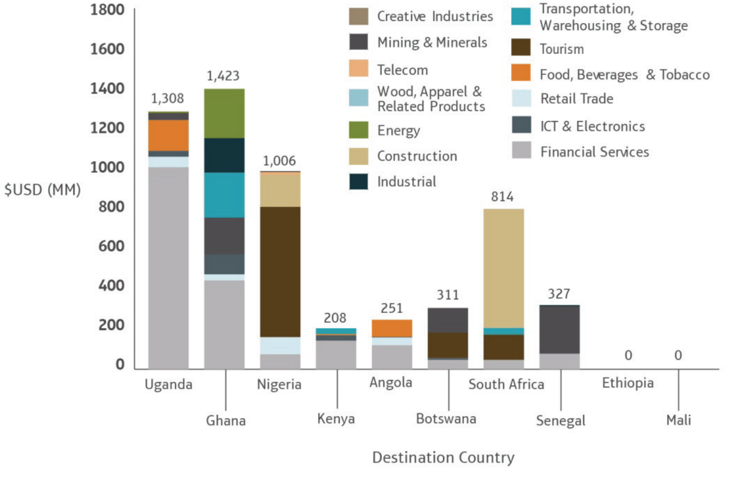
Although the record of foreign aid helping to spur economic growth is at best mixed, FDI is flowing into cities and clusters with encouraging prospects, especially into communications and infrastructure that will enhance productivity growth. Africa delivered the best return on equity of any emerging economy – including China and India – in 2006-2007.

Analysis of a database compiled by Monitor of 612 private-sector investments worth $122.8 billion in our representative SSA countries between 2004 and 2008 reveals the following patterns:

More than half the total FDI is flowing into the largest, most urban economies, South Africa and Nigeria.

By sector, two-thirds of all investment occurs in energy, although mining and minerals, construction, and ICT (especially cellular telephony) are also significant.

Table 3: **Cumulative Value of Intra-Africa Private-Sector Investments by Industry and Destination Country (2004–2008)**



Note: Source countries include Benin, Botswana, Congo, Egypt, Ivory Coast, Kenya, Libya, Malawi, Mauritius, Morocco, Namibia, South Africa, Sudan, Togo, Tunisia, Uganda and Zimbabwe; the top 5 source countries by investment value include South Africa ($1,661MM), Nigeria ($1,477MM), Kenya ($791MM), Zimbabwe ($639MM), and Egypt ($622MM)

Source: Financial Times

The importance of Chinese investment in SSA has often been exaggerated in the media. Although China has significantly increased spending on the subcontinent in the last decade, its total in our database is dwarfed by those of the European Union and United States and, surprisingly, falls below that of India.

Our discussion of Chinese FDI trends pertains only to our select 10 African countries, which includes 9 of sub-Saharan Africa's 13 largest economies. Consequently, this report does not take into account Chinese FDI to several significant African recipients, including Sudan, Africa's 4th-largest economy, and Zimbabwe, the government of which recently announced five Chinese FDI deals worth a reported $8 billion and involve mostly the energy and minerals sectors.

East Africa is attracting significant investment, with Uganda the destination for more money than the larger nearby economies of Kenya and Ethiopia.

Local businesses are increasingly investing elsewhere in SSA. The database includes 111 deals worth $7.2 billion originating within the subcontinent, with South Africa, Nigeria, and Kenya the most active investors and Uganda, Ghana, and Nigeria the major destinations. By sector, much of this investment is flowing into financial services, ICT, and hospitality and tourism.

Implications for Policy and Action

It follows from these findings that an opportunity exists for the constituencies most engaged in SSA's growth and development to work together more productively to encourage the growth of cities and the cultivation of more competitive clusters. The following are Monitor's recommendations to each constituency:

Municipal, Provincial and National Governments:

- Promote urban development by upgrading infrastructure and public services. Given limited financial resources, this may entail working with the private sector and outside sources of funding to find innovative solutions.

- Complement macroeconomic with effective microeconomic policies to cultivate competitive clusters. This, in turn, may require better data gathering, reporting, and analysis.
- Invest in human assets specifically linked to entrepreneurship and the development of competitive clusters.
- Target and recruit relevant foreign investors whose presence will bolster competitive clusters.

Multilateral Institutions:

- Take account of the growth of cities and their competitive clusters in development policy, with an increasing amount of assistance delivered at local levels and to institutions that can reinforce existing economic strengths and build new ones. Multilateral institutions today have a major opportunity to modify their traditional approaches to assistance and make them more effective.

Public Sources of Aid:

- Increase the portion of funding devoted to enabling Africans to help themselves climb the economic ladder. As with multilateral institutions, this constituency has a major opportunity to revisit its traditional approach. In recent years, most aid has been directed at public health and ameliorating the symptoms of poverty, especially in rural areas. These are important causes, but funding sources should increase direct support for generating economic growth, particularly in cities, and creating an environment for growth to prosper — through investments in infrastructure and education, for example.

Private Philanthropists:

- Direct funding toward helping Africans help themselves. As is the case with official foreign assistance, most philanthropy has been directed at public health and ameliorating the symptoms of poverty. Again, these worthy causes must be complemented with investments to increase economic opportunities for the citizens of SSA.

Multinational Corporations and Foreign Investors:

- Recognize the increasing prosperity of SSA, especially in the cities, and invest to serve the burgeoning middle class.
- Note that the infrastructure shortfall in SSA provides attractive opportunities to develop new roads, railways, power grids and water supplies, particularly as part of public-private partnerships and for infrastructure service companies.
- Identify and understand the local determinants of competitiveness and productivity growth in SSA when making decisions to enter or expand in particular locations.
- Invest directly and indirectly in human assets to upgrade specialized skills and capabilities.

African Entrepreneurs and Business Leaders:

- Pursue strategies to achieve and sustain advantage in an increasingly competitive and globalizing economy.
- Invest in employees to enhance their specialized skills and capabilities as a source of competitive advantage.
- Collaborate with relevant constituencies to build and strengthen competitive clusters.

In sum, a significant opportunity exists for sub-Saharan Africa to emerge from the global economic downturn as a vibrant and growing region – the next development frontier. The subcontinent confronts serious economic, social, and human development challenges, but underlying drivers of long-term prosperity are gathering momentum: the emergence of thriving microeconomies, particularly in cities and their competitive clusters; the upgrading of the skills and knowledge of Africa's peoples; and the rising flow of FDI from outside the continent and from within.

This momentum was particularly palpable in summer 2010 when South Africa hosted the FIFA World Cup. As suggested by the South African parliament, the World Cup reflected and refracted "immense goodwill" and a "positive brand reputation" not only for the nation but also for the entire continent. This "re-branding" effort contributes strongly to the larger 10-year initiative driven in part by the African Union (AU) and the African Communications Agency (ACA) to rebuild the image of Africa as a modernizing and hospitable environment for investment and economic development.

A promising economic future of SSA is building from the bottom up.

Conclusion

Most commentary on prospects for sub-Saharan Africa reflects a reading of the political map of the continent. There are too many countries, it is claimed, particularly small ones that cannot operate efficiently at scale. There is too little cooperation among states, and within states, bureaucracies are too often incompetent and corrupt. Too much foreign aid is dissipated in administration; too little of it reaches the people and institutions it was intended to help. Bluntly put, SSA has been mismanaged.

An alternative view of the region, however, forms when observers start with a different map. A microeconomic map of the subcontinent reveals the most productive parts, where most GDP is generated, in competitive clusters in cities. This shows the future of SSA as it is being built from the bottom up.

It is true that SSA is well-endowed with natural resources, oil and gas, diamonds and other minerals, and that there is ample land for producing agricultural commodities. But the wealth represented in these assets, even if well managed – and the record on that point is clearly not encouraging – offers only partial hope for the future of SSA's peoples. Too much of the value that is added to Africa's natural resources and commodities occurs offshore, and too much of the labor at home is essentially untrained and poorly rewarded.

The most encouraging economic stories in SSA are not those of mineral or energy wealth but rather of the healthy and growing clusters in cities that are gaining competitive advantage in the regional and global economy. These are human stories, of entrepreneurship, innovation, and capitalizing on the development of specialized skills and capabilities. This happens millions of times a day in small ways in the informal economy and far less often, but with disproportionately large effects, when new networks of transportation and services infrastructure integrate competitive clusters and draw concentrations of skilled human assets to thriving commercial sectors, when a few banks become centerpieces in an increasingly sophisticated financial services cluster, or when telecom entrepreneurs feed the frenzied demand for mobile telephony.

It would be naïve to forecast that SSA is poised for an economic take-off, following the paths of China and India. That is extremely unlikely. Here is where a view of the political map of the subcontinent clearly reveals obstacles to economic progress. China had centralized decision makers and a relatively efficient bureaucracy. At the time of its take-off, India possessed a much bigger pool of well educated and resourceful citizens who found ways to connect to the global economy – as employees of foreign companies, as suppliers, and as entrepreneurs. Yet the India example also affords hope to SSA. The most vibrant cities and clusters in India succeeded by building from the bottom up. That, ultimately, is the promise of SSA – that Lagos, Johannesburg, and other primate cities will accomplish what Bangalore and Pune achieved.

For that to happen, urbanization must continue but be better managed, through the provision of appropriate infrastructure with the capacity to serve increasing numbers of people in the future. Existing competitive clusters must be strengthened, even as new ones are cultivated. SSA's peoples must also receive more investment to give them the skills that will equip them to compete in the global economy. The key constituencies that will determine SSA's future must focus their efforts, separately and collectively, on helping its cities and clusters to grow and to flourish.

Here are some steps for these constituencies to consider:

Municipal, Provincial, and National Governments. The determinants of economic competitiveness are local. Therefore, government at all levels must work together to create local conditions that promote competitiveness. If SSA is to follow the examples of other major economies further up the development curve, its leaders must invest behind the growth of cities and competitive clusters.

A place to start is with significant improvements to infrastructure. Although many governments are beginning to pledge higher infrastructure spending, they will still not be able to fund expansion while maintaining and upgrading what they already have without outside help. Apart from telecommunications, privatization has not brought the benefits or investment that might have been expected, and the quality and quantity of all forms of hard and soft infrastructure still lag other emerging regions, such as Asia and Latin America. SSA's governments are beginning to expand new infrastructure construction by circumventing their financial constraints through the use of public-private partnerships. However, these only exist in a few countries in the region. Strong PPP frameworks and the public policies and supports that make them effective need to be adopted throughout SSA. This will create the foundations for establishing and nurturing the city-clusters that can make the region economically competitive in the interconnected and increasingly knowledge-based global economy of the twenty-first century.

Another priority for government at all levels is to upgrade the education and skills of its citizens. In the past decade, SSA has witnessed significant increases in primary- and secondary-school enrollment. This trend must continue, and curricula and degree programs should be tied to the needs of growing clusters and sectors to help ensure that young people finishing school find productive and meaningful work. Curricula can highlight business and economic successes, foster entrepreneurial skills and mindset, and provide practical training in disciplines and areas important to individual advancement.

Finally, SSA governments must welcome FDI and support it with policies and actions to help it flourish. This is a valuable source of money, ideas, and talent that can multiply in the right conditions, when the investment is linked to promising avenues of economic growth, and when the rewards of success are appropriately distributed among investors, employees, and communities.

Multilateral Institutions. The World Bank recently has become more active in promoting programs for urban areas, altering its almost exclusive traditional focus on combating rural poverty. Other multilateral institutions need to take account of the evolving microeconomic map of SSA and encourage the development of competitive city-clusters. These institutions may wish to consider joining with public and private actors in supporting infrastructure projects. Another approach could involve linking assistance and advice to reforms and policies to increase the competitiveness of existing clusters while also cultivating promising new ones.

Donors and Philanthropists. Although the efficacy of traditional aid and philanthropy is sometimes questioned, there can be little doubt that it has helped significantly in the fight against HIV/AIDS, malaria, and other diseases, as well as in initiatives to upgrade education and increase literacy. The record of these constituencies in helping lift people out of poverty is much less convincing. The best solution to the problem of persistent poverty is economic growth, which creates and then multiplies opportunities to raise standards of living. Donors and philanthropists, therefore, may wish to consider increasing funding to enable Africans to help themselves climb the economic ladder. This may entail supporting entrepreneurs and social entrepreneurs with ideas and actionable plans to create jobs, upgrade skills, and increase incomes, especially if they can operate at scale. The majority of the most promising business ideas, at least initially, are likely to be found in or linked with cities and competitive clusters.

Multinational Corporations and Foreign Investors. Many Chinese investors and business people believe Africa is the last frontier of mega-investment opportunity. The rising prosperity of SSA, especially in the cities, should be inviting to this constituency.

MNCs are beginning to serve the emerging urban middle class, which shows patterns of consumption similar to counterparts in other emerging markets – a potentially massive business opportunity for companies with goods and services targeted at this segment.

It is not only the emerging middle class that provide lucrative opportunities for foreign investors. The infrastructure shortfall in SSA offers attractive opportunities to develop new roads, railways, power grids and water supplies, particularly as part of PPP frameworks. Although such investments are long-term, they will open up the SSA market for goods and services and to further development opportunities in construction and other sectors, which might also be of interest both to those companies playing a role in infrastructure development, and to other international firms.

Nevertheless, before embarking into the markets of SSA companies and foreign investors must do their homework diligently. They should identify and seek to understand the local determinants of competitiveness and productivity growth before making decisions to enter or expand in particular locations. This means identifying attractive clusters and investigating the quality of existing infrastructure, the dynamics of local labor markets, the availability of qualified suppliers, the presence of related and supporting institutions, and the strengths and weaknesses of incumbent rivals.

Finally, the peoples of SSA hunger for means of advance, and most recognize that advancement will be tied to competitive success in the global economy. By all accounts, they are willing to work hard and are eager to learn. They require investment to build their skills and capabilities, and this investment is likely to yield a significant return. At the same time, companies and investors should look for opportunities to cultivate local suppliers, link the formal and informal economies, and cooperate with other constituencies to strengthen the clusters in which they operate. Some MNCs present in SSA already understand this and appear to be going about it in the right way. Other companies need to follow.

African Entrepreneurs and Business Leaders. This constituency needs to keep doing what it is already doing – pursuing commercial opportunity, investing to cultivate markets, increasing employee skills and expertise, and rewarding owners and investors. Balance sheets and income statements ultimately do not lie. When all is said and done, the winners will be the most competitive companies, those with a strong sense of moral purpose behind what they are doing and that establish a differentiated presence in the marketplace by offering superior products and services. Yet an important ingredient of competitive advantage also is contextual. That means entrepreneurs and business leaders must help to cultivate local suppliers and business partners and work with governments and NGOs and other constituencies in the development of healthy and competitive clusters.

The Monitor Group report excerpted here (*Africa from the Bottom Up*) was prepared under the direction of Christoph Andrykowski and Bernard Chidzero, Jr., partners in the firm's office in Johannesburg. The above article in based on the 2009 Edition of their report: Africa from the Bottom Up. Cities, Economic Growth and Prosperity in Sub-Saharan Africa.

3.2. Africa Moves to the Center Stage China – Africa's New Champion in BRIC by John Battersby & Yingni Lu

There are periods in the dynamics of global power when the shift in trends is of such a scale that it is almost impossible to perceive the full impact in the moment.

It was certainly the case with the phenomenal rise of China as a major global economic power.

And it is happening again with the rise of Africa as a priority investment destination as it moves into a similar position that China was in three decades ago when that country began opening its economy to global forces.

The key elements in China's economic miracle have been an integrated market, special economic zones with incentives for foreign investors and widespread reform of the agricultural system which has freed up more labor for economic development.

Africa is moving in the right direction on these key elements but there are fundamental differences with China and the evolution of Africa's economic miracle will be different.

China's lifting of 400-m people out of poverty in three decades, maintaining 10% GDP growth for three decades, the helter-skelter rate of urbanization at almost 20-m per year and now the unprecedented growth of the middle-class – mainly took the West by surprise.

Probably Africa's greatest disadvantage is in the area of perceptions. The huge deficit between the reality of Africa and the Western media's obsession with negative stereotypes of conflict, famine and failed states undermine the continent's potential.

The mainstream media has dominated the grand narrative for the past four decades and through selective – rather than inaccurate – reporting has buttressed Africa's negative trends at the expense of its potential.

But the reasons why Africa's growing potential as an investment destination is not yet conventional wisdom are multiple:

- In the past few decades, Africa has taken significant strides towards more democratic governance, more transparent economic systems and eliminating some of the more crippling bureaucratic barriers to trade and investment.

- Although Africa still falls far short of constituting an integrated market, the trend toward integration and more transparency is undeniable.
- The invitation of South Africa to become the fifth member of the BRICS – Brazil, Russia, India, China and South Africa – and the South African seat on the UN Security Council will ensure that Africa has a voice in all key global fora and will accelerate reform of the United Nations and global financial, developmental and trade architecture.
- The credit crunch and global economic recession have created a fundamental crisis of confidence in the international financial system which has both removed any moral highground that the Washington-consensus institutions had and opened the way for an ongoing review of the current architecture.
- The potential of Africa as an investment destination has been long recognized and supported both in terms of investment and soft loans by China – now the world's second largest economy – and with strategic investments from South Africa – and rising economies such as India and Turkey.
- There is ample evidence of Africa's potential to leapfrog constraints such as fixed-line telephones with the revolu-

tion of mobile technology in Africa. The next breakthrough will need to come in the field of energy and electricity provision. Africa's hydro-electric potential could play a key role here.

- In a world where there is growing consensus that future wars will be fought over food and water resources – rather than territory or ideology – Africa is well-placed to play a key role with its huge water reserves and vast tracts of arable land.
- With a population approaching 1-bn, Africa represents the world's third-largest market after China (1.3-bn) and India (1.1bn) and is rich in largely unexploited mineral and natural resources.
- South Africa played a key role in rescuing the 2009 climate change summit (COP15) in Copenhagen. There was enough progress at Cancun in Mexico at the end of last year to ensure that the next critical session of the COP17 in Durban in November this year could broker the breakthrough that world so badly needs.

It is fitting that Africa should play a key role in the search for a global trade-off on climate change as Africa has the lightest carbon footprint of any region yet stands to lose most from the impact of climate change.

But there is a twist in the tail here.

As the industrialised world focuses increasingly on management of the corporate carbon footprint, it may well be that the "biodiversity footprint" – which focuses on maintaining the balance in the entire eco-system – is even more relevant for Africa because of the greater diversity of species on the continent.

It may therefore be a priority for African countries to re-consider their growth patterns in order to ensure the preservation of this diversity.

China, South Africa, India and Turkey are now leading the way in the development of Africa while traditional trading partners and investors – such as Britain, the US, France and Germany – battle to maintain their share of market.

The new grouping of promising emerging markets known as the CIVETS – Columbia, Indonesia, Vietnam, Egypt, Turkey and South Africa – already include two countries from the Africa Continent.

The rest will follow in time. Mauritius, Namibia, Botswana, Ghana, Kenya, Nigeria, Zambia, Senegal etc.

Africa is fast approaching the tipping-point but it has not quite registered in the industrialized club of nations.

South Africa's position as voice and advocate of the African cause in the shifting sands of global economic power and institutional reform now becomes even more critical as it takes its place both in the BRICS and the UN Security Council.

As the shift in global economic power gains momentum, South Africa's trade is moving eastwards and southwards in what has become a clear pattern which both reflects the global trend and is helping drive it.

It is no coincidence that since the beginning of the last year, South Africa's President Jacob Zuma has paid his first State visits to India, Russia and China and, in July. Brazil's President Luiz Inacio Lula da Silva paid his first State visit to South Africa following a working visit by President Zuma earlier in the year.

There is no doubt in the minds of either China or African nations that President Zuma is speaking not only on behalf of South Africa but the whole African continent on these trips abroad.

Even the notion that the much smaller South African economy could join four mega-economies in BRIC would have been unthinkable a decade ago.

While attending a UN conference on trade and investment in Beijing in mid-September last year, the South African Trade and Industry Minister Rob Davies said South Africa would prioritize China and India as export destinations of choice as these countries were now its biggest export markets.

Two-way trade between China and SA reached R 119,7bn in 2009 surpassing the US as the country's largest trading partner, according to South Africa's department of trade and industry. SA's exports to India last year reached R5bn while imports totaled R2bn, in favor of SA, the department's trade statistics show.

The fundamental shift in South Africa's trading patterns was also clear from statements made by President Jacob Zuma during and after the State visit to China in August.

South Africa would look to China for investment in meeting its infrastructure projects including transport systems, freight transport, renewable energy projects and mining. The agricultural sector and car manufacturing were also potential recipients of Chinese investment.

In the past three years, while the pace of Chinese investment has been slow, it has been strategic and clearly paving the way for accelerated investment in the future.

In 2007 the Industrial and Commercial Bank of China (ICBC) bought a 20% stake in Standard Bank for R36-bn making it China's largest foreign investment to date. In 2009, China announced that the African headquarters of the China-Africa fund would be in Johannesburg.

China has more recently invested in a South African platinum mine and a cement factory and one of the most concrete agreements emerging from the State visit to China in August was the intention to build a high-speed rail link between Durban and Johannesburg.

But the most consistent message that President Zuma conveyed in the State visits to China and Russia was that South Africa wanted to learn from both countries on how to ensure high levels of beneficiation of South African mineral wealth to ensure that the country was able to speed up development, create more jobs and roll back poverty.

President Zuma also stressed that South Africa needs to balance its trade with China to reduce the heavy deficit in China's favour. He also foresaw co-operation between the two countries in reforming the global architecture and multilateral institutions.

The growing relationship with China is seen both as a means to boosting South Africa's global trade and of accelerating the development of the Africa continent.

With its world-class financial sector, deep experience in African markets and an extensive corporate footprint on the African continent, South Africa is well-placed to lead an African miracle similar to China's achievement over the past 30 years.

3.3. Made in ~~China~~ Africa A Real Opportunity for Manufacturing by Nicholas Norbrook

The Chinese are queuing up to start businesses in Africa. “In France it was so-so”, says Joseph Kosure, the CEO of Kenya’s Export Processing Zones Authority, who is on a worldwide tour to showcase Kenya’s potential. “The hall was half-full of French businessmen. But in Shanghai, two weeks ago, we had to change rooms! People were standing in the aisles.”

African manufacturing has been struggling for some time. The shoemakers of eastern Nigeria no longer export across the continent. Kwame Nkrumah’s gleaming towers have been scrapped under successive waves of structural adjustment. Zimbabwe’s industrial fabric has been mothballed. The textile workshops that bankrolled Togo’s ‘Mama Benz’ have fallen into disuse; the heavyweight women carrying blocks of cash under their colorful wraps are now importing fabric from abroad. Only in a few spots like Egypt and South Africa, the last bastions of industrial-sector jobs, is the candle kept alight.

There is an argument over why: corruption, poor business plans, weak implementation, cheaper imports, the Bretton Woods dogma. But everyone agrees that Africa is the only region in the world where there is rapid urbanization without industrialization. The large numbers of unemployed youth in Africa’s cities are a top priority for African policy makers, keen not to squander the demographic dividend.

Industrialization needs more than labor: it needs power and transport infrastructure. For exporters, it needs a government that can expedite licenses and provide tax holidays, or else Vietnam, Thailand or Mexico will get there first. The debate is over before it has even begun, perhaps, for a continent that needs over $30bn in infrastructure investment per year for the next decade to catch up, according to estimates at the World Bank and African Development Bank.

The elephant in the workshop is China. Wage inflation coincides with Beijing's drive to push infant industries out of the nest. Despite the perceptions of US congressmen, China is shedding manufacturing jobs in its most labor-intensive sectors to low-cost alternatives elsewhere. Bangladesh's garment exports are now worth $12bn, up from $5bn in 2002. Can Africa join the party?

The China Price

In the popular imagination, the decimation of Africa's manufacturing sector is due to cheap Chinese goods strangling nascent African industries. There is a measure of truth to this, and the 'China price' has hit manufacturers worldwide. But the number of Chinese factories in Africa is also rising. In South Africa, China's second-largest car manufacturer, First Automobile Works, announced plans in April to build a $100m auto parts facility. The following month, - Jidong Development Group announced a partnership with Wiphold Capital, a women's empowerment group, to open a new $217m cement factory. South Africa's Standard Bank, which has partnered with China's ICBC, told *The Africa Report* in June that they were in conversation with dozens of Chinese manufacturers who were keen to set up in Africa.

In Douala, A $500m bus-assembly plant should start producing vehicles by the end of 2010 in a joint venture by Chinese and Cameroon investors. The Xinxiang Kuroda Mingliang Leather Company is setting up a $67m leather factory in Ethiopia.

"Ethiopia is the best example to refute some of the criticism of China being in Africa only for resources," the Chinese ambassador to Ethiopia, Gu Xiaojie, said in October.

These examples are only some from 2010. Many examples date from earlier in the decade, such as Brother Shoes in Egypt, which arrived in 2001 and has captured 50% of the footwear market.

Consumer Goods

Deborah Brautigam, author of *The Dragon's Gift*, catalogues many more enterprises that are taking advantage of a ready market and cheap local inputs, from the Hisense electronics company which bought a factory in Johannesburg in 1997 and by 2008 was exporting to 16 African countries, to the Chinese plastics factories in Kano, northern Nigeria.

At the large conglomerate and the micro-enterprise levels, Chinese manufacturers can see business sense in locating operations in Africa – just as telecoms operators at the beginning of the 21st century disproved the notion that 'poor' Africans could not afford to buy airtime. China-Africa trade will top $100bn in 2010, almost half of which is accounted for by imports of Chinese goods. Only 10% is machinery, while much of the rest is inexpensive consumer goods that could be made in Africa.

A more activist Chinese industrial policy to help manufacturers move into international markets has accelerated the trend. In the 1990s, this was done in a haphazard manner, without proper planning; it was more a political venture than a business proposition. The second wave has been more successful because it copies the patterns that brought such success to manufacturers at home.

Special economic zones (SEZs) are attractive to manufacturers: they are relatively free of red tape and onerous taxes, are close to ports and roads and have a ready supply of cheap labour. In 1979, China established the first SEZ just north of Hong Kong in Shenzen, signalling the first steps of a manufacturing juggernaut.

In 2006, the Chinese government announced it would launch 50 SEZs around the world. Africa has seven that are nearing readiness: two in Nigeria, and one each in Algeria, Egypt, Zambia, Ethiopia and Mauritius. The Egyptian zone, launched in 1998, is relatively modest, at around 5km². Zambia's Chambishi zone is well advanced, mostly processing ore from surrounding mines and employing around 6,000 people. A second Zambian zone near Lusaka is planned to host manufacturers of electrical goods and mobile phones. To a greater or lesser extent these zones are funded by the China-Africa Development Fund (CADF), an equity investment fund announced in 2006 at the landmark Forum on China-Africa Cooperation.

This is not charity; the profit motive is important for the operators of these SEZs. It also perhaps points to the long-term viability of manufacturing in -Africa. “If these were just for soft power, where would we expect to see these showing up: Angola, which is where China gets most of its oil? Equatorial Guinea, where it wants to get in? Zimbabwe? Sudan? Tanzania? If it were just for the political motive, these zones would be going to places like this, but that’s not the case,” says Brautigam.

Trade Terms

China has also offered preferential trade terms, with 95% of goods duty-free for Africa’s least- developed countries.

Even though there is a ready market for a great deal of goods in Africa itself, the accumulation of Chinese national and state offers has even created incentives for Chinese factories to sell back into China, according to Brautigam. “It depends what they are producing,” she says. “Some, in Egypt, are already exporting back to China: those processing marble, for example. The Chambishi zone in Zambia sells copper all over the world, some of which goes to China, with some marketed internationally via the commodity exchange in London.”

Of course, Chinese manufacturers do not all require state support. Shao Junhao arrived in Côte d’Ivoire at the age of 23 after graduating from Xi’an International Studies -University. A French major, he wanted to practice his French and seek a posting abroad because it offered a better salary. He has now been there for eight years. “I’m not leaving yet, but I won’t stay forever,” he says. Shao’s firm currently manufactures pharmaceuticals from a factory in Abidjan’s industrial zone. “At the moment, our products are sold on local markets,” he says. “The zone offers favorable policies. Companies get a tax break of three or four years.”

Business Incubators

Athi River is the fastest-growing municipality in Kenya. It is a burgeoning industrial zone, with four cement manufacturers, most of which are expanding and still cannot meet Kenyan, let alone regional, demand. But most of the growth has been down to the export-processing zone (EPZ), which lies a few hundred meters off the road to Mombasa.

Inside the zone, 23 companies are busy making everything from clothes and tarpaulins to pharmaceuticals, dartboards, batteries and various agro-processing products. A new business incubator is being built, with the current one fully occupied by Nestlé. A sewage plant 16km away takes care of effluent and is built to scale up for future growth. An electrical substation runs off a special circuit to the main grid.

A pink doll surrounded by Mandarin characters takes pride of place on top of the awards cabinet in the boardroom of the EPZ main office. “A gift,” explains John Chifallu, communications director for the EPZ. “Every month or so we receive a delegation from China.”

The Chinese bring more than just dolls. The road to Mombasa from Nairobi is financed and built mostly by China Road and Bridge Corporation, and several Chinese textiles companies are already operational in the EPZ.

Peter Hsu, the Taiwanese owner of Protex Kenya, which operates in the EPZ, started operations nine years ago and now employs around 3,000 workers. The factories produce 250,000 items a day. Taking advantage of the US government’s African Growth and Opportunity Act, which -allows duty-free access for certain items into US markets, Protex imports textiles from Asia to transform them into clothes that are sold predominantly to Walmart. He has no regrets about coming to Nairobi, citing the quality of the workforce. In Cambodia, where Protex also has a factory, “about 70% of the workers are illiterate,” says Hsu. “Here they are skilled and pick things up quickly.” Employees work hard but they enjoy an hour’s lunch break in a subsidized canteen, an onsite doctor and health insurance. The factory looks like almost any other modern garment facility but is clean and well-maintained. Working hours are long but employees earn around $120-$150 per month and all belong to the Tailors and Textiles Workers Union.

The Long View

The 10-year tax holiday offered by the EPZ and duty-free access to the US make it an attractive proposition, even when Protex starts paying regular taxes in 2012. Moving operations to China is not an option. “Fifteen years ago, when as a Taiwanese person I could invest in China for the first time that would have made sense. Now the margins are not there,” says Hsu.

For now, the real profits accrue to Protex, to the textile manufacturers in Asia and to the retailers in the US. The jobs in Kenya are not negligible, but they don’t bring much money into the economy. On the other hand, new factories can build strong backward and forward linkages, with a textile company creating demand for weaving, spinning and ginneries, as well as for a garment industry.

Some take the long view. Abebe Selassie, IMF regional studies chief, believes that these are tomorrow’s issues. “In China in the early 1980s, there was no attempt to try to capture the value chain,” he says. “There was only the rush to attract investment. Only later did they start concerning themselves with technology transfer.”

The Kenyan EPZ’s Chifallu is also sanguine, even though he admits that there is no government plan to ensure technology transfer. However, he recounts a story told to him by the Bangladeshi ambassador to Kenya on a visit to the EPZ.

The ambassador said that his country launched its own textile industry after several years of producing for South Korean factory owners. “After a secret cabinet meeting, the Bangladeshi government agreed that local entrepreneurs had enough experience of the technical, managerial and marketing sides of the business,” says Chifallu. It set up a fund to provide interest-free loans to businessmen and within 10 years, the majority of the sector was in Bangladeshi hands. “And these Bangladeshi factory owners are now coming here, looking to set up factories in the zone,” enthuses Chifallu.

In this fairly benign version of Africa’s economic future, the continent has to focus on attracting investment into manufacturing by continuing to upgrade infrastructure and providing tax breaks. And after a time, technology transfer and local ownership will follow.

In Nnewi, Nigeria, this is already happening. Local entrepreneurs such as Cletus Ibeto and Innocent Chukwuma, both of whom run a flourishing business inspired after interaction with Chinese traders, are manufacturing auto parts. In Ethiopia and Mauritius, the arrival of cheap Chinese leather imports pushed local manufacturers to invest in new technology, and industries in both countries are thriving.

Sino-African Issues

Where countries play a strong hand, the process may be enriching in the best way: encouraging broad-based growth, sharing technology and kick-starting industrialization as local copycats open similar factories or feed into supply chains, with industrial-sector salaries stimulating the service sector.

Outside of the fairly well-regulated economic zones, life is much tougher. Anecdotal evidence of hazardous working conditions has already emerged, especially in labor-intensive industries. On Ladipo Oluwole Street in Lagos, a Chinese wig factory (see left) employs children who are barely teenagers. “We cannot afford to take *okada*,” or motorcycle taxis, says one, walking home after her shift.

Sanusha Naidu, research director at the NGO Fahamu in South Africa, says African governments need to be aware of a series of concerns, from ensuring appropriate levels of technology transfer to governance issues. China may also be exporting its environmental costs along with its labor-intensive jobs.

This cuts to the heart of the debate about the future Sino-African relationship. China is interested in Africa for a growing list of reasons: access to natural resources, opening new markets for Chinese products and helping domestic industries expand abroad. African politicians can draw on plenty of lessons from the past to make the most of Asia's new interest in Africa.

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4. Africa as a Tourist Destination

African Destination Images Projected on African Tourism Websites
Upgrading Opportunities in the Global Value Chain of Tourism

by Jeroen van Wijk, Frank Go & Robert Govers

4.1. Introduction

The tourism service sector is considered to be a promising industry that could significantly support the development of African economies. African governments that target foreign tourists are firmly supported by international organizations. The United Nations, for example, has identified the tourist sector as a means in the 'war on poverty' that could play a key role in achieving the Millennium Development Goals by 2015 (UNWTO 2005). A major barrier, however, is Africa's troublesome image. Africa has actually two dominant images in the outside world. In the western mass media the continent is overwhelmingly associated with corruption, violent conflicts, hunger and diseases. *The Economist* summarized this view some years ago and concluded that Africa was a "hopeless continent". A stark contrast forms Africa's tourism image, which conjures up gazes of wide open spaces, nature and wildlife, ready for discovery by the adventurous tourist willing to visit the past. Western tour operators generally depict Africa as a space where Westerners can re-discover a "pre-industrial self". In so doing, they tend to ignore the present African societies. Even the continent's economic power house, South Africa, appears unable to shake such pre-industrial image. Western travel brochures typically portray black, coloured or Indian South Africans basically as heritage products (Cornelissen 2005).

The dominant image perception that a majority of foreigners have of Africa is increasingly challenged on grounds that it would not reflect Africa's dynamic diversity in terms of economic growth, political stability and optimism. Various forums have tackled the question how to "re-brand" Africa.[1] With respect to tourism development, Africa's re-branding strategies raise two issues. The first is about structure, and concerns the opportunities for African tourism suppliers to brand their destinations in the main international markets, considering their as yet marginal position as players in the global tourism industry. Moreover, destination management organizations (DMOs) heavily rely on the Internet for information exchange and computerized reservation systems. Since most African countries have limited connections to global information and communication technology (ICT) networks, tourism service suppliers must be inventive to cope with, or circumvent, what is commonly called the 'digital divide'.

The second issue refers to content, i.e., the contribution by Africans themselves in sustaining the image that foreigners tend to have of the African continent. In his presentation called "Africa's negative global media identity: who owns the lenses?" Mawugbe (2006) reports on a study that investigated the sources of African news published in two state-owned newspapers in Ghana in 2005. The analysis revealed that 85 per cent of the articles on Africa were sourced from the BBC News Agency. Only 15 percent were based on information gathered by Ghanaian reporters working for the Ghana News Agency. The author's conclusion that the re-branding process should start from Africa itself is also relevant for the tourism industry. It raises the issue which African organizations own the lenses that give rise to the formation of destination branding and to what extent the image they project to the outside world differs from the foreign stereotypes.

The Internet has become *the* medium for tourism marketing. In principle it also offers a promising space for relatively marginal industry players to reduce their dependency on the main international tour operators. This opportunity raises a key question:

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[1] See for instance the discussion on 'Strengthening Branding and Changing Perceptions", during the 2006 Word Economic Forum on Africa in Cape Town; the article "Changing Brand Africa" in the first 2007 issue of the International Trade Forum; and the "Re-Branding Africa" theme during Africa's International Media Summit in 2006, in Ghana.

How could African suppliers leverage global virtual networks to expand their presence in the high value-added activities of branding and marketing?

In this context, this paper explores how African service suppliers presently brand their tourism destinations in the international market. It focuses on both the structure and the content of tourism websites of three sub Saharan African countries: Rwanda, Uganda and Mozambique. The paper is largely organized along the following three questions: (a) What are the opportunities for indigenous tourism service suppliers in these African countries to project their own image of tourism destinations in the international markets through the Internet, (b) which organizations can be considered to be the 'movers and shakers of tourism branding in these countries, and (c) what dominant national destination image, if any, do these organizations currently project?

In the remainder of the paper we first position the marketing of African destinations in a theoretical framework that is based on two approaches. With the *global value chain analysis* we explain the relative position and strategies of African tourism service suppliers in the global tourism industry. The *dynamic image formation* approach is then used to clarify the Internet-based marketing strategies of African service suppliers. Then, in section 4, we explain the methodology used for the tourism website search and content analysis. Section 5 presents the results, and in the final section we end with conclusions and a discussion.

4.2. Global value chain analysis of the tourism industry

Global value chain (GVC) analysis is a systemic approach that focuses on transnational networks of companies, aligned in value chains (Gereffi and Korzeniwicz 1994).[2] The GVC approach offers an analytical model to understand the nature of ties between geo-

[2] GVC analysis was developed under the name of 'global commodity chain', but the term 'commodity chain' has been replaced by "value chain' in the recent literature in order to enable coverage of those products that lack commodity characteristics (Gibbon and Ponte 2005: 77).

graphically dispersed firms of all sizes that are linked together in global markets. GVC analysis helps identifying the underlying global organization of an industry in order to uncover basic power relations within the chain as well as the allocation of economic surplus (Clancy 1998: 125).

Relationships and dependencies among actors in the chain is a key issue in GVC analysis. Some value chains are dominated by one firm that has (vertically) integrated a large part of the value added activities of the chain. In other chains, lead firms have emerged due to global outsourcing and concentration. In the retail sector, for example, lead firms increasingly dominate suppliers through their market power and forms of hands-off control, rather than through formal ownership. Lead firms own a technology, a highly valued brand, and market knowledge that is vital to the entire chain. Since their strategic decisions impact all other actors in the chain, lead firms *de facto* are capable of governing the chain, i.e. setting the quality standards for the entire chain (Gereffi et al 2005; Gibbon and Ponte 2005; Humphrey and Schmitz 2004).

A second important element in GVC analysis is the intra-chain competition, i.e. competition among the chain actors. Whereas the lead firm may push for lower supplier prices and higher quality standards, suppliers and traders may challenge the position of the chain leader. Same can be effectuated by a process of 'upgrading', i.e. the movement by chain actors from low-value to relatively high-value activities in global production networks (Gereffi and Korzeniewicz 1994). The most commonly used categorization of upgrading, identified by Humphrey and Schmitz (2004), involves: (a) process upgrading (more efficiency); (b) product upgrading (more sophistication); (c) inter-chain upgrading (diversifying into alternative value chains), and (d) functional upgrading (the acquisition of new functions in the chain, such as processing or design, marketing, branding). Since the latter process is about taking over functions from other firms, the targeted competitor is expected to strike back. Functional upgrading aspirations thus may result in either a rivalry among suppliers in the chain (Meyer-Stamer 2004: 338-340), or clash with the core competencies of the lead firm (Humphrey and Schmitz 2004: 359).

The GVC approach is useful to examine issues concerning competition and collaboration in the global tourism industry. However, there is a dearth of research in this domain, which justifies our undertaking the present study. In one of the few accounts on this topic, Clancy (1998: 128-130) has argued that it is difficult to map the tourism value chain because the sector has two particular characteristics. First, the sequential and spatial nature of tourism differs from manufacturing, as production and consumption take place simultaneously in the same place. Second, tourism does not constitute one single industry, but is made up of a series of overlapping services and goods. For these reasons he examines two of the main relevant service sub-sectors, the hotel and airline industries, rather than the entire GVC.

In this paper we posit that the tourism industry could be examined as a complete (global) value chain. Transactions within the chain can be analyzed from two perspectives. First, a so-called business-to-business approach, which explores the role and relations amongst suppliers and intermediaries along the chain, including their contestations and negotiations, which usually entail the mobilization of arguments about what entails value-adding and for whom during the various stages prior to tourism services being sold to consumers. Secondly, there is the 'business-to-consumer' approach, which implies that the tourist moves upstream into the value chain, thereby by-passing the intermediaries and purchasing various services from the individual service suppliers. Against this background, tourism services should be perceived as modules, to be either tightly coupled through the GVC or loosely coupled, e.g. via a combination of tourist services at the DMO-level. Either way: both versions result in the travel/holiday experience. The former adhering to a rather strict hierarchical and efficiency-driven regime, wherein services are typically sold through intermediaries, which can be divided in two categories: (a) intermediaries who, supported by global computerized reservation systems, serve as retailer of all-inclusive package tours, and (b) tour operators who offer the trusted quality that many consumers appreciate. Especially in non-Western destinations, such as Africa intermediaries play a crucial role to help Western-tourists bridge the gap between travel expectation and experience.

The latter, i.e. independent travel, also known as unarranged travel involves tourism services that are not packaged in nature, affording (independent) tourists a sense of freedom and more spontaneous trip planning. Independent tourism service suppliers increasingly use the Internet for their own 'business-to-customer' (B2C) sales. Airlines, hotel chains, and Internet-based travel platforms offer online booking opportunities, allowing travelers to plan their own holiday itinerary. Access to a home PCs is sufficient to embark on a dynamic mix-and-match process that, at a bundled price, may include the purchase of airline tickets, hotel rooms and rental cars. In the US 20 per cent of travel is bought online, a figure which is anticipated to grow to 50-70% (Boles 2004), whereas in the UK, 50% of holidaymakers are expected to book their arrangement through the Internet (Garrahan 2005). The tourism GVC may therefore be variable in length, with both tour operators and suppliers performing high value-added functions, particularly in marketing and branding.

Moreover, the sale of tourism services is not the only B2C encounter in the tourism value chain. Consumption takes place *in situ*, which implies that travelers must move to the production locations to consummate the tourist experience. Typically, the value chain holds the potential for B2C encounters both during the trip and upon arrival in the destination. An important question is whether and how individual suppliers are capable to leverage functional upgrading opportunities in a way that enhance the travel experience and benefit all other actors in the tourism GVC.

Significant product and process upgrading is required to make African tourism destinations more attractive to a wider public. African destinations hold a marginal competitive position in the international tourism market, which is reflected in the relatively small number of visitors: only three per cent of international travelers end up in sub Saharan Africa (UNWTO 2007). Inter-chain upgrading, i.e. diversification into alternative tourism value chains, is potentially promising. A wave of affluent middle class tourists is emerging in China, Brazil, Russia, and India over the next 10-15 years (Future Foundation 2005:15), and African destinations could cater to these new markets.

In view of African image formation, the most relevant category of upgrading is functional upgrading. The source of power in most global value chains lies increasingly in branding, marketing, product development and coordination of inter-firm relations. Due to the bad overall image of the continent, and the high level of investment that is required to join the global reservation systems, African tourism service suppliers largely depend on trusted international tour operators for their sales. This dependency has two consequences for African suppliers: (a) they play an insignificant role in the high-value added functions of destination marketing and branding in the main tourism markets, because these nodes in the value chain are looked after by multinational lead companies, and (b) they can only play a very limited role in the formation of the projected image of African destinations, which, again, is covered by the lead firms in the value chain.

This position makes an exploration of opportunities for functional upgrading particularly relevant for African tourism service suppliers. From a tourism GVC perspective, at least three strategies are possible:

(1) Enhancing reputation: Because travelers move along the value chain to consume services with individual suppliers, the latter are offered a unique opportunity to build and enhance their reputation directly with end consumers.

(2) Shortening the value chain: individual tourism service suppliers could use the Internet for direct marketing (and sales) to consumers in foreign markets, targeting at "self catering" or "co-creating" travelers. This market segment consists of visitors who do not require holiday packaging of trusted outbound tour operators, but use the Internet to build their trip by themselves.

(3) Destination branding: associations of African individual tourism service suppliers, supported by governmental bodies, could promote a specific country, region or city as tourism destination. A competitive asset of African destinations is the geographic authenticity which is relevant in view of "origin-based trust" (Gibbon and Ponte 2005: 184) in an African experience. The use of geographic indications reduces the mental distance between suppliers and consumers, enables the former to engage in B2C marketing, and may

make legal protection of the geographical trade name a wise option. Independent, international branding of the destination could enhance interest by foreign consumers, and provoke a higher demand for African destinations with tour operators.

However, functional upgrading into branding and marketing is a challenging one. This process requires local tourism stakeholders in African destinations, in a collaborative context, developing a distinct and competitive image that bridges the gaps in the perceptions and expectations of the destination's services between local tourism entrepreneurs on the one hand and visitors on the other. Functional upgrading requires capabilities in dynamic image formation.

4.3. Dynamic image formation

The branding of the image of Africa becomes increasingly important as image formation has become a more dynamic process, moving away from the one-way 'push' process of mass communication and fixed channels, to a situation where image creation is a dynamic interactive process of sharing, reflecting, selecting, debating and experiencing (Molenaar 1996, 2002). With the proliferation of the internet, its convergence with and influence on the demassification of the media (Toffler 1980: 165; Werthner & Klein 1999: 69), tourism destination images are becoming increasingly fragmented and ephemeral in nature (Harvey 1989: 293).

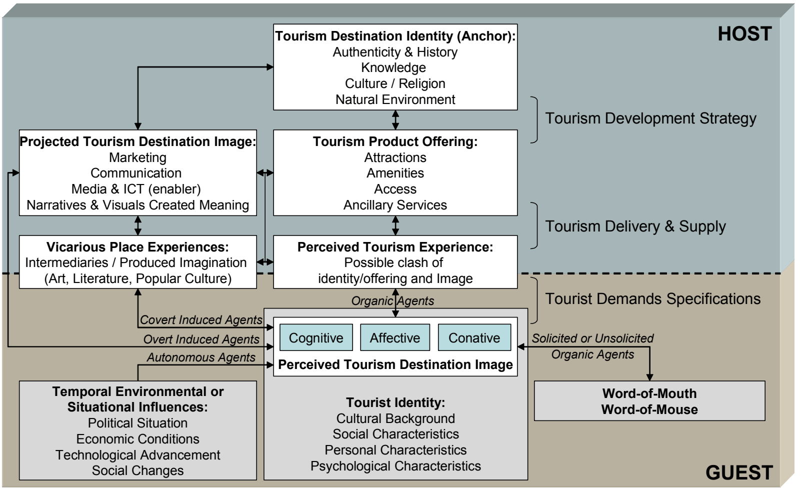
However, today's technologies do not merely assist us in our everyday lives; they are also powerful forces acting to reshape our behavior as tourists and our understanding of places. The use of the Internet, radically changes the communication process, from the traditional media of "the language of tourism" (Dann 1996), based on monologue and 'unilateral communication from western senders (tour operators) to western receivers (tourists)' to its electronic equivalent, "Word-of-Mouse" (Riedl et al. 2002). This scenario opens the way for interactive communication. It not only provides the tourist with a 'voice', but also lets destination residents and other actors have a "greater say in deciding whether or not to accept tourism and, if so, what type and how it should be promoted"

(Dann 1996). Technological advancement, the global media and increased international competition affect the way in which tourism destinations are imagined, perceived and consumed.

This is illustrated in Figure 1**.** This model provides the basis for the detailed synthesis of the destination image formation paradigm from a ‘3-TDS’ gap approach (Govers & Go 2004; Govers et al. 2007), confronting host-guest (supply and demand) perspectives, based on the idea of the 5-gap service quality analysis model by Parasuraman et al. (1985: 44)) and with major contributions from Baloglu and McCleary (1999), Fesenmaier and MacKay (1996) and Gartner (1993). The internet, as a medium for projecting images, but also as a channel for vicarious place experiences (Kim & Richardson 2003) (as an induced agent in Gantner’s (1993) terminology) can form the basis for a perceived destination image in the mind of the consumer prior to visit (Baloglu & McCleary 1999; Beerli & Martín 2004; Boorstin 1962; Boulding 1956; Echtner & Ritchie 1993, 2003; Gallarza et al. 2002; Gartner 1993; Poiesz 1989). This is mediated by the person’s identity (i.e. self-congruity (Baloglu & McCleary 1999; MacKay & Fesenmaier 2000; Sirgy & Su 2000)), potential temporal environmental or situational influences (Gartner & Hunt 1987) (or Autonomous Agents according to Gartner (1993: p. 201-203)), and the direct or indirect interaction with other consumers (word of mouth/mouse (Riedl et al. 2002), or Solicited or Unsolicited Organic Agents in Gartner’s terminology (1993: 203-204)).

The projected image should be anchored to some extent to the identity of place (brand) (Go et al. 2004; Noordman 2004; Onians 1998; Van Rekom & Go 2003; Van Riel 1996: 34) as well as the tourism product offering, as it builds experience expectations. As the tourism industry is highly fragmented and involves many different kinds of players (attraction, accommodation, transport and ancillary service providers), a consistent and harmonized projected image obviously requires a tightly coupled regime orchestrated by the GVC (as opposed to fragmented) local business networks that tend to be orchestrated on a or loosely coupled basis of value chain management. In this respect the bridging of North-South gaps seems an essential issue demanding the attention of researchers.

Chart 1. **The 3-gap Tourism Destination Image Formation Model. (Source: Govers & Go, 2004)**



Content analysis of narrative representations of African destinations on the Internet can therefore provide useful insight into how the continent is presented and projected through global value chains and business networks. Investigating what is projected by various actors in the industry, would give us insight into what part of the image of the world that they have, they want to "appropriate" (Sontag 2002: 4). Taking this into account, different actors in the tourism industry, public agencies versus private sector-specific companies, are hypothesized to have different objectives in terms of projecting a destination image that will favorably affect their intended positioning and ultimately their customers' buying behavior. Based on Gnoth (2002) and Govers and Go (2005) it can be assumed that induced images will vary among different actors. The issue is, as Long (1997) puts it, "how actors struggle to give meaning to their experiences through an array of representations, images, cognitive understandings, and emotional responses".

4.4. Methodology

The methodology used for the African tourism website research comprised of a website search and content analysis of website text.

4.4.1. Website search

Tourism websites were collected from three African countries: Rwanda, Uganda and Mozambique. The website search focused on English-language websites, and took place initially through the Google search engine, using search terms such as ‘Tourism [country]’, ‘[country] Travel’, ‘Gorilla Uganda’, ‘Diving Mozambique’, etc. The tourism portals that were discovered offered additional tourism enterprises. Hard copy travel guides, such as of Lonely Planet, were used to trace more tourism suppliers that were then checked for online presence. Finally we relied on personal experiences and networks to collect tourism service suppliers that we may have missed. As later ‘control searches’ revealed no new relevant websites, we assume that our data set is nearing the entire population of tourism websites relevant for the three countries that were operational in 2006.

The search focused at three categories of websites:

(a) Tourism portals, which we define as online information gateways that offer links to local intermediary and primary tourism service suppliers. The portals may be either specialized in tourism or may be general interest portals with links to tourism websites. Two selection criteria were used: portals should be fully focused on one of the three countries, and they should be free of commercial interest other than of marketing the countries as tourism destinations.

(b) Intermediary organizations. They include mainly online booking agents and tour operators.

(c) Primary tourism service suppliers. This category covers all types of accommodation, safari tours, diving schools, museums, community-based tourism projects, etc. For both the intermediaries and primary suppliers the following selection criteria applied. The website (i) should represent a domestic tourism enterprise; (ii) should indicate that the owner of the enterprise is in control of the website content; (iii) may either have an exclusive domain name, or has at least one full web page dedicated to the firm; (iv) should include contact details that enable customers to get in direct contact with the enterprise.

The data set includes a total of 449 websites (see Table 1). Ownership and server location of the websites was determined by using 'who is' queries on the website DomainTools.com. Websites with a top-level domain name (TLD), such as '.com', would give a variety of information, including the registrant or owner of the domain name, the registrant's real address, as well as the country of the server that hosts the website. For websites with a country code top-level domain (ccTLD), for instance '.rw', information was basically collected at national registration sites. Those African websites that lacked their own domain name were categorized under the registry information from their host domain.

Table 1. **Dataset of Tourism Websites in Three African Countries**

	RWANDA		UGANDA		MOZAMBIQUE	
	Dataset	Content analysis	Dataset	Content analysis	Dataset	Content analysis
Primary suppliers	28	12	172	138	141	116
Intermediaries	16	15	66	57	6	5
Portals	6	2	7	7	7	6
Total	**50**	29	**245**	202	**154**	127

4.4.2 Content Analyses

In order to identify most frequently used words in the website content, automated content analysis with the software package CATPAC was used. CATPAC will work with any and all words in the text; produce a frequency table and then perform the neural network analysis on the top-X most frequently found words (the latter functionality not being used for the analysis presented in this paper). X (i.e. the maximum number of words to be included in the analysis) is to be defined by the researcher. However, words incorporated in an exclude file are ignored. A default exclude file containing words like articles, prepositions, and other 'meaningless' words is provided with CATPAC[3], but the researcher can incorporate additional words in de exclude file.

Because a substantial number of websites lacked textual content, only 358 websites were used for content analysis. Text was collected from every website at three levels of website pages: the home page, the internal pages that were accessible from the homepage, and the internal pages that were accessible from the second-level pages. The texts were merged into three country files. In each file, synonyms were merged, for instance 'dive' and 'diving' ended up as two occasions of the word 'diving'. Eventually, we produced for each country a list of 60 words that appear most frequently at the tourism websites. These words were then listed into seven categories which are commonly used in the tourism literature to characterize tourism destinations (cf. Echtner 2002; Gnoth 2002).

4.5. Results: Tourism Websites Structure and Projected Destination Image

Table 1 provides an overview of the magnitude of websites that project Rwanda, Uganda and Mozambique as tourism destinations on the Internet. Rwanda has the smallest representation on the Internet; Uganda the largest. The vast majority of the tourism websites represent primary tourism service suppliers, except for Rwanda where these account for slightly over half of the total number of websites. Accommodations in Rwanda seem very much under-represented online: of the 72 hotels and accommodations that could be traced, only 12 have a website.

4.5.1 Digital Divide and Online Tourism Representation

The first issue that is to be addressed is how African online firms cope with the limited ICT infrastructure, the regular power black-outs, and a population that has limited computer skills. One of the

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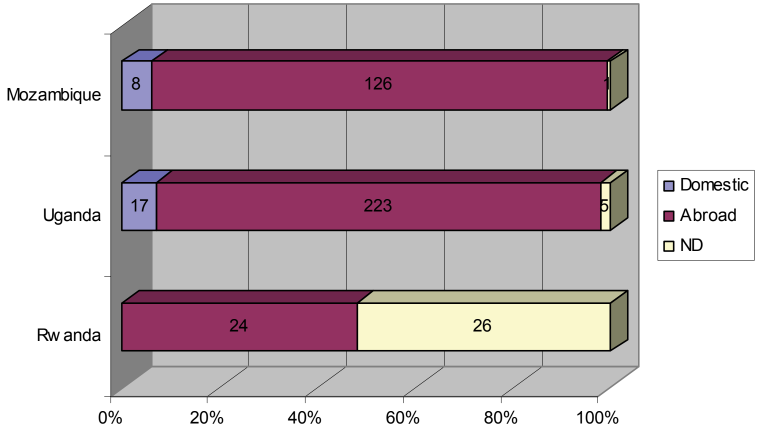
[3] For further details working of the programme see for a good overview please refer to (Woelfel & Stoyanoff 1993). Among others, Gretzel and Fesenmaier (2003) and Ryan (2000).

strategies of coping with the digital divide is hosting the website with a server in a technologically advanced country. Figure 2 indicates that this appears to be the strategy of choice for the vast majority of tourism service suppliers. Only a very small proportion of websites in Uganda and Mozambique is hosted by domestic servers. Importantly, most servers that are used are located in the US, Europe or South Africa.

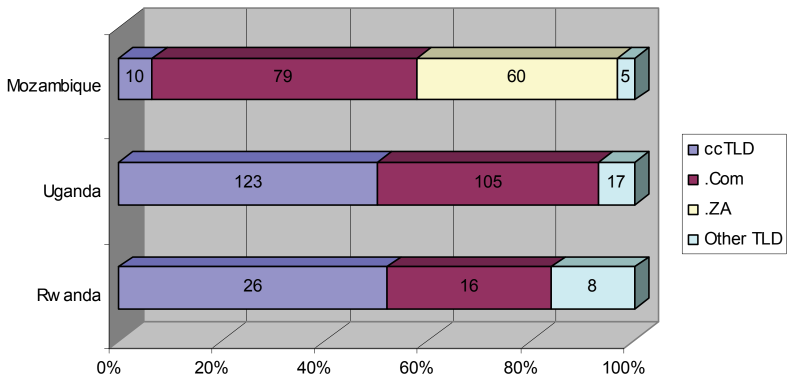
A second strategy to circumvent the digital divide is related to the administrative dimension of a limited ICT infrastructure. Availability of Internet service providers, price differences between Top Level Domain (TLD) extensions, or long procedures may influence firms in their choice for a domain name. For this reason generic TLDs may sometimes be preferred over country code TLDs (ccTLD). On the other hand, ccTLDs may also have some emotional appeal and may contribute to the overall image projection of the country, although they might prove to be more difficult to find on the web as consumers are potentially less familiar with these country codes. Figure 3 shows that half of the online tourism firms in Uganda and Rwanda use their own ccTLD. The other half resorts mainly to the .com TLD. Mozambican tourism service suppliers hardly use the ccTLD. Around half of them use the .com TLD, where the remaining firms can be found with the.za extension, which basically reflects the high number of South African tourism entrepreneurs that invest in Mozambique.

Chart 2: **Server Location of Tourism Websites of Three African Countries***



* Analyses of Mozambique is based on only 135 service suppliers

Chart 3: **Domain Names of Tourism Websites of Three African Countries**

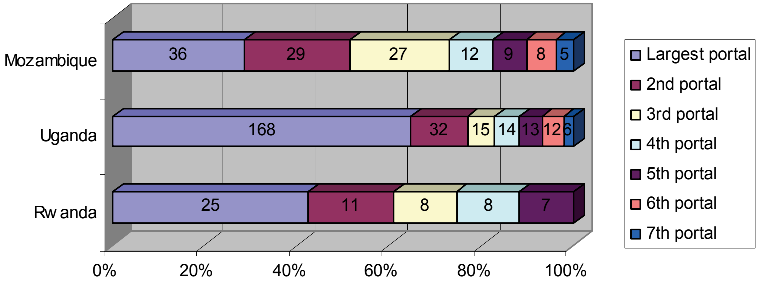


4.5.2. Tourism Website Networks

Tourism websites can be divided into two categories: suppliers of tourism services, such as accommodation, gorilla tracking, or scuba diving, and intermediaries, such as local tour operators and booking agents, and portals. Tourism portals tend to be viewed as the most powerful websites, because they serve as information hubs in website networks, thereby influencing many users. Portals guide potential customers via hyperlinks to intermediaries and primary suppliers. The information provided on the portal as well as processed on the websites linked to the portal, in combination contribute importantly to exerting an influence on the formation of projected image of a particular country as tourism destination.

Figure X shows the tourism portals per country. They are presented in a hierarchy that is based on the number of hyperlinks to local tourism service suppliers. The higher the number of hyperlinks, the higher the position in the hierarchy. The chart also offers the proportion of hyperlinks per portal in the total number of hyperlinks of all portals combined.

Chart 4: **Hierarchy of Tourism Portals in Three African Countries, Based on the Number of Hyperlinks to Tourism Service Suppliers**



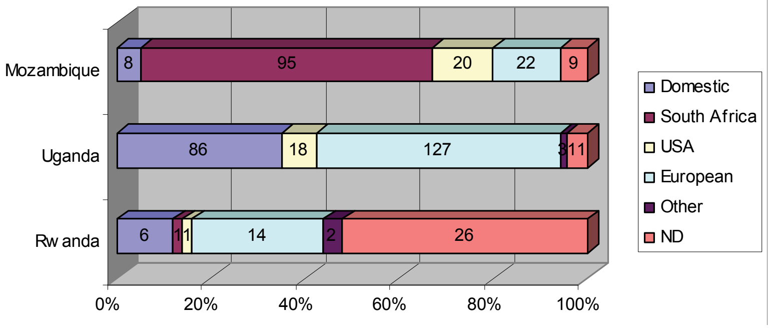
In Rwanda, six tourism portals were discovered. The largest is the *Bwana Mitch's Safari Portal* (http://www.safari-portal.de/RW.e.html), owned by a German entrepreneur. The Safari portal accounts for about 40 per cent of total Rwandan tourism portal hyperlinks. The second largest portal is that of the *National Museum of Rwanda* (http://www.museum.gov.rw/). The museum portal is one of the two tourism portals that are owned by Rwandan organizations. It offers many links to museums, genocide memorials and exhibitions in Rwanda.

Mozambique has seven tourism portals, which are all owned by foreign organizations.[4] The three largest portals have a combined share of 70 per cent of the total number of hyperlinks from the tourism portals to Mozambican service suppliers. The portal *Off road and Sea* (http://www.ofroadandsea.com/) is the biggest and owned by a UK based entrepreneur. The owners of the other two portals *Northern Mozambique* (http://www.northern-mozambique.com/) and *Mozguide* (http://www.mozguide.com/index.asp) are based in the USA. The remaining four tourism portals are owned by organizations or entrepreneurs residing in South Africa.

Tourism opportunities in Uganda are presented by seven portals that are mostly owned by Ugandan organizations. The second largest portal is *VisitUganda* (http://www.visituganda.com/) that accounts for 15 per cent of all hyperlinks from tourism websites. The portal is operated by the Uganda Tourism Board that functions under the aegis of the Ugandan Ministry of Tourism. The two main Ugandan newspapers have their own tourism portal: *EnterUganda* (http://www.enteruganda.com/) and *MyUganda* http://www.myuganda.co.ug/). A significant finding is the foreign ownership of Uganda's largest portal, *TravelUganda*. This portal (http://www.traveluganda.co.ug/) accounts for over 60 per cent of all tourism portal hyperlinks. The owner is a South African tourism entrepreneur who resides in Europe. His firm offers Ugandan tourism service suppliers web space either under their own domain or, alternatively, under the domain of TravelUganda.co.ug. By using the cheaper and faster Internet access of Swiss internet service providers he can offer his web hosting services at a competitive price (Van Wijk and Kelder 2007, forthcoming).

[4] Several Mozambican-owned tourism information websites were found, but since they did not offer hyperlinks to local service suppliers they could not be included in the analysis.

Chart 5: **Domicile of Tourism Website Owners in Three African Countries***



Basis: Number and share in the total number of websites in the sample.
* Calculations are based on the domicile of the website registrant

Next to the identification of the main tourism websites, the data offers the opportunity to examine the domicile of the registrants of the websites, which can considered being the website owners. Figure 5 shows that the vast majority of tourism websites in the three African countries is owned by entrepreneurs or organizations that do not live in the country that the website represents. Only a few percent of tourism websites in Mozambique and Rwanda are domestically owned. In Uganda this proportion is around 35. Over 60 per cent of Mozambican tourism websites is presently owned by individuals and organizations residing in South Africa, while more than half of the Ugandan websites are owned by Europeans, mainly the owner of the TravelUganda portal. Europeans also seem to play a disproportionate role in the website ownership in Rwanda, although for over half of the websites no data on registrants was available.

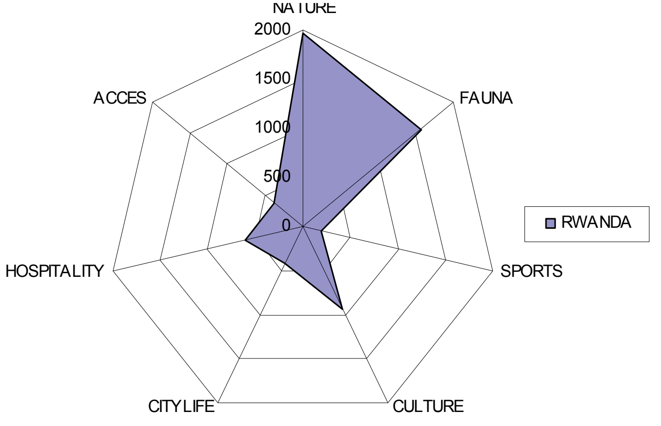
Both the information on the tourism Internet portal networks and on the domicile of the website owners indicate that the virtual 'real estate' of online tourism in the three African countries tends to be foreign owned. In Mozambique this situation basically reflects the high interest in Mozambique by South African tourism investors in view of the South African tourist market. In Uganda, the foreign involvement can largely be explained by one foreign web-hosting firm that offers local tourism service suppliers the opportunity of having an online exposure and that dominates the national market. As a result, the "lenses" of image formation of three African national destinations seem to be substantially owned by foreign stakeholders.

4.5.3. Projected Destination Image

To reveal the destination image projected by the tourism websites in the three African countries a content analysis was carried out on the total sample of websites per country. The aggregate result of the study is shown in the three radar charts (figures 6-8). The charts show a number of interesting findings:

(a) All three countries project particularly NATURE as the key attraction of the country. The category nature is built on words, such as 'forest', 'volcano', 'park', 'lake', 'falls', and 'ocean' (see annex 1 for a more detailed explanation).

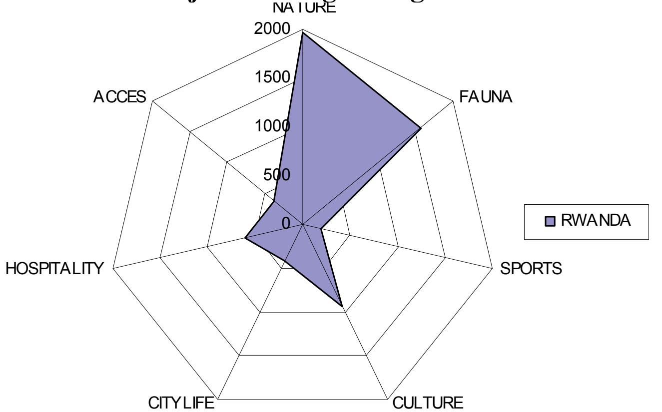
Chart 6: **Projected Image of Rwanda as Tourism Destination**



Basis: Content analysis of 29 tourism websites of Rwanda

(b) Both Rwanda and Uganda also strongly include FAUNA in their projected image. This category basically refers 'gorillas' and 'chimpanzees' of which colonies can be found in both countries, as well as to words such as 'safari', 'game', and 'bird'. In Mozambique FAUNA seems to be a less important attribute in the image projection, even though the country hosts rare wildlife (both terrestrial and marine).

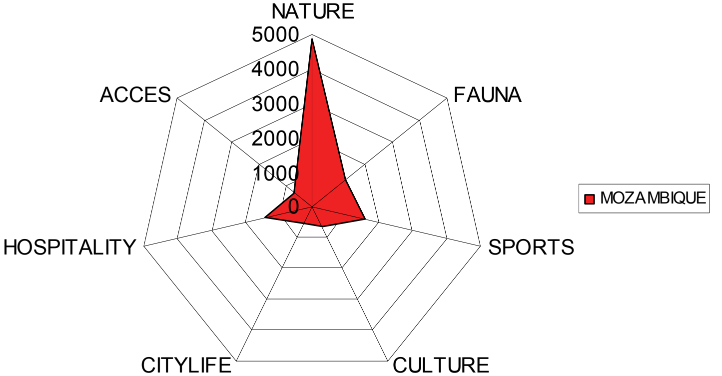
Chart 7: **Projected Image of Uganda as Tourism Destination**



Basis: Content analysis of 202 tourism websites of Uganda

Perhaps this low emphasis on wildlife can be explained by the South African dominance in Mozambique's online tourism networks. Wildlife is ample available in South Africa itself, and South African tourists are particularly interested in the Mozambican coastline.

Chart 8: **Projected Image of Mozambique as Tourism Destination**



Basis: Content analysis of 127 tourism websites of Mozambique

(c) In the Mozambican projection the category SPORTS is relatively visible. This category is mainly made up of the words ‘dive’, ‘scuba’, and ‘boat’, and reflects the ample diving opportunities on the Mozambican coast. In Rwanda and Uganda sporting opportunities are less available or developed.

(d) The category HOSPITALITY (‘hotel’, ‘lodge’, ‘resort’, ‘bar’, ‘campsite’) seems well presented in the projected image of all three countries. In contrast, ACCESS (‘road’’, ‘drive’, ‘tour’) and CITY LIFE (including mainly the names of the largest cities in the countries) are categories that seem to be less relevant in the projected images. Neither seems CULTURE (based on words such as ‘museum’, ‘local’, ‘tradition’, ‘genocide’) particularly important in the projected images of Mozambique and Uganda. In Rwanda culture has more prominence. However, this result might be biased by the well-developed museum portal that is having a relatively large influence on the small sample of Rwandan websites.

4. 6. Conclusions and discussion

In this paper we have tackled the question as to how African suppliers could leverage global virtual networks to expand their presence in the high value-added activities of branding and marketing. In respect of the structural dimension, we found a high reliance among indigenous suppliers on foreign server networks, general Top Level Domains, foreign web hosting services, and foreign tourism investors. This reflects, on the one hand, the competitive vulnerability of local African tourism firms that have to cope with the digital divide. Access to advanced ICT networks and better skills to manage computer software may put foreign tourism entrepreneurs therefore in a relatively advantageous position for functional upgrading in the tourism global value chain. The result is that the “lenses” that make destination images visible to the international markets are largely foreign owned, which may carry the risk of reinforcing stereotype images of Africa. On the other hand, resorting to effective foreign web hosting organizations, while maintaining control over the website content, may reduce such as risk. Hiring foreign organizations seems a pragmatic strategy for indigenous tourism firms to circumvent the limitations in domestic ICT infrastructure.

In respect of the content dimension of the tourism websites, it was found that the projected images only weakly bridge the destination image gaps. First, as regards the *strategy gap* there is a risk that the projected image is not structurally linked to the identity of place where foreign ICT providers are used. The focus is primarily on nature and fauna, which is in line with international perceptions, but culture and heritage attributes are largely ignored or negatively presented. Second, because those who make the promise on service delivery (foreign ICT providers and channel captains) are different from the firms that deliver the service, the *delivery and supply gap* may be wide. This gap may trigger considerable discrepancies between tourist expectations and experiences, and harm the destination's reputation. Third, in respect of the *demands specifications gap*, the projected image on the websites upholds international hegemonic media perceptions. None of the African tourism websites tries to bend or contradict stereotype images in an attempt to improve the image of Africa's culture, people and economic and political situation. A reason for this might be that the indigenous tourism suppliers themselves hold a stereotype image of what foreign tourist would like to see, ignoring a growing segment of tourists that is interested in more local content of their holiday experience. Catering to this demand in low cultural contexts requires tourism service suppliers to differentiate their products much more. For instance, value could be added to ordinary hospitality issues (room, bed) when linked to local customs in order to create an African experience. Adding local content in respect of high culture context involves the provision of online information about, and references to national novelists, musicians, artists, architects, and fashion designers. The tourism websites are almost completely silent on the cultural attributes of their destinations. Hence, there will be a gaping gap of demands specifications when consumers have to mix and match what they know through autonomous agents and the limited information (only focusing on nature) that they get on the tourism websites.

Functional upgrading in the global value chain of tourism requires African tourist destinations identifying their true position in the market through the systematic and critical analysis of the image they project upon an international audience. Such an exercise should give destination management organizations appropriate insights in their strategic degrees of freedom to focus their efforts on one of three or a combination of aforementioned destination strategies, namely:

(1) Enhancing reputation designed to build and enhance reputation directly with end consumers;

(2) Shortening the value chain through ‘direct selling’ thereby bypassing established intermediaries.

(3) Destination branding which leverages the power of network-association to promote a specific of African country, region or city as tourism destination.

No single tourism destination can afford to stand alone, because each is locked into a complex tourism GVC network of relationships. Therefore to be effective, the destination management organizations (DMOs) of Rwanda en Uganda should contemplate how to achieve a collaborative advantage. When one assesses the results of the present analysis it seems clear that assess the strength of both nations lies, at least from a tourism image perspective, in its natural assets. In contrast, Mozambique is not so much dependent for its success as DMO on the image projection of its fauna, but rather its balmy coastal line, which is ‘fed’ by the wealthy South African tourist market.

With regard to Rwanda and Uganda our research results indicate a similar pattern for both destinations in that in both cases the gorillas are seen as their main attraction feature. Therefore, the gorilla may be interpreted as a ‘crown jewel’ and anchor for the fostering of the tourism image formation process. Within the framework of the complex tourism GVC network of relationships the gorilla as symbol would serve the function of ‘network picture’ around which to mobilize relevant actors to develop a jointly-supported destination brand identity, which incorporates relevant local cultural-natural characteristics. The gorillas habitat is a sufficiently distinctive symbolic feature to differentiate (Aaker and Joachimsthaler, 2000) Rwanda and Uganda as tourism destination from competing destinations and persuade tourists to visit Rwanda an Uganda instead of other destinations.

Against the backdrop of branding within a network approach, it is essential that the DMOs constantly assess on one hand their strategic opportunities along two main strands. Firstly, identify strategies that enable DMOs to bridge the digital divide including the support of foreign servers and foreign web hosting organizations. However, secondly, the reliance on foreign organizations is and shall continue to be considerable in future and therefore is likely to lead to new dependencies in functional upgrading strategies of destination branding and marketing. Consequently, DMOs must be vigilant and monitor constantly their business relationships within the complex tourism GVC network with suppliers (e.g. hoteliers), customers and other business partners (e.g. airlines) on four brand level: the brand as a product, the brand as a symbol, the brand as an organisation and the brand as a personality. Modern tourists want to experience 'a sense of place' when visiting a destination. Hence, experiential and symbolic benefits play as important a role as functional benefits in a destination brand's identity. For purposes of bringing a sense of harmony in the 'network picture', Rwandan , Ugandan, and Mozambican based DMOs could develop the capabilities to deal with the effects of the dynamic tourism destination image formation process and its ensuing triadic tensions between place identity, its projection and the consumers' perceived image.

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5. Africa's Society
Mobile Phones, Democracy and Social Change in Africa: Different Approaches
by Herman Wasserman

The recent (January 2011) uprising in Tunisia is the latest example of mass activism in which new media technologies played a role. It has been widely acknowledged that the tools of new media, including mobile phones and the internet, were instrumental in overthrowing President Zine Al-Abedine Ben Ali (Satchu 2011). The protests in this North African country has been called by some a "social media revolt" (Brock 2011) because of the role that Twitter and Facebook have played in mobilizing the middle classes. These networks also helped spread information about what was going on, informing Tunisians as well as observers around the world of how the revolt was progressing (Brock 2011). Although Tunisia has one of the internet highest access rates in North Africa and the Arab world, the authorities have also built a firewall aimed at censoring messages, and bloggers suffered attacks in a cyber war (Lewis 2011). The demonstrations were initially given little coverage in the mainstream domestic media (see Brock 2011 for an explanation of why there was also less mainstream coverage of these protests in the West than there was of the uprising in Iran in 2009), but the cyber war in Tunisia took off with the release of Wikileaks cables on Tunisia (Lewis 2011).

Some observers have pointed out that while new media have played an important role in the uprising, their effect should not be exaggerated or seen in isolation. Social media is one layer in a media landscape in which satellite television like Al-Jazeera has also been highly influential (Lynch 2011). The effect of these various media should therefore be considered collectively. Other critics have downplayed the role of new media in mobilizing the protest, and warned again euphoric claims of a new media revolution.

The disputes and differences of opinion about the impact of new media technologies on social and political change in this North African country is not the first of its kind. The effectiveness of new media technologies to bring about social change is highly contested.

In a recent, controversial article in the *New Yorker*, the journalist Malcolm Gladwell (alluding, of course, to Gil Scott-Heron's song "The Revolution will not be Televised") claimed "The Revolution will not be tweeted" (Gladwell 2010).He pointed to the civil-rights protests in the American South in the 1960s that started with a sit-in at a diner and ended by engulfing the South for a decade. These protests, he insists, "happened without e-mail, texting, Facebook, or Twitter."

No Consensus on Mobile Phones and Democracy

When it comes to Africa, the contribution of ICTs, of which mobile phones form a part, to development and democracy has been widely debated (Hahn & Kibora 2008:88). Consensus has not yet been reached regarding the extent to which mobile phones can create an alternative politics and facilitate social change. Assessments often hinge on the decision of whether to foreground the structural limitations of these technologies – factors like the political economy of access, or the nature of the medium that determines and limits the form and style of communication- or the agency of its users, with their creative adoptions, adaptations and domestications of these technologies. Assessing the *impact* or *effect* of new media technologies, including mobile phones, seem often to be a case o the glass being half full or half empty.

Those that prefer to see the glass half full might say that the revolution has already taken place. Those for whom "only superlatives seem appropriate" (Etzo & Collender 2010: 659), to describe the "revolution" in Africa, might remind us that mobile phones have shaped the communications landscape much more rapidly than in Europe (Hahn & Kibora 2008:88). In Africa, mobile phones are "almost always the cheapest and quickest way to communicate" (Etzo & Collender 2010: 659), because this technology does not require a network of landlines, which is often absent or inadequate in Africa (Ekine 2010x). The enthusiasm with which Africans have embraced mobile phones is illustrated by anecdotes of African consumers literally breaking down doors to lay their hands on a coveted device, or police having to control ‘overenthusiastic customers’ (Southwood 2008:xvii). The figures, indeed, are astounding. There are more than 350 million mobile phone subscribers on the continent, representing an exponential 550% rise in take-up in the five years between 2003 and 2008. Average penetration of mobiles in Africa is more than a third of the population, with Gabon, the Seychelles and South Africa standing at almost 100% penetration (Smith 2009). What is more, these figures do not even tell the full story of access to mobiles, as Mobiles are considered ideal vehicles for the deepening of democracy (e.g. through the promotion and monitoring of elections) and development (the so-called ICT4D usage) because they enable users to leapfrog fixed-line infrastructure which in many areas of Africa is lacking. The impact of mobile telephones on economic growth in developing countries has been found to be double that of rich countries – a developing country with on average 10 or more mobiles per 100 people has been shown to have a 0.59 percent higher growth in GDP than a country that is identical in all other respects (Etzo & Collender 2010:662).

These mobile optimists point out that phones are used for much more than making calls. There are “1001 uses” (Berger 2008) of cell phones beyond voice communication. Africans use mobiles to: text, transfer money (with the M-Pesa service in Kenya seen as a trailblazer in this regard), check market prices for agricultural products, monitor elections, send and receive public health or emergency messages (through services such as Ushahidi or Frontline SMS). But apart from these more ‘serious’ uses of mobiles, Africans use mobiles in everyday life to take photographs, make films, watch television (Berger 2010) search the Internet and, yes, to Facebook and to tweet (Berger 2008, FreedomFone 2010, Smith 2008, Etzo & Collender 2010). The range of functionalities of mobile phones make it an “extremely versatile technology” (Ekine 2010:xi) that can be used by activists to plan campaigns long in advance or respond quickly to events. Although the versatile ‘third generation’ smart phones is not yet as prevalent in Africa than in the North, older communication practices like *radio trottoir* are combined with new technologies in novel and creative ways [Mabweazara 2010:14; Nyamnjoh in Wasserman 2009:])

Are ICT's Really the Beginning of a New Democratic Era?

But history has taught us to take claims of revolutions in Africa with a pinch of salt. During the roughly two decades of research into ICTs in Africa we have often seen initial visions of utopia dissipate, especially as these relate to the intersection between new media and democratic politics. At the outset (from the 1990s onwards), debates about the potential of ICTs – especially the Internet - to widen participation in the public sphere have been marked by optimism and "almost utopian bliss" (Mudhai, Tettey & Banda, 2009: 1). ICTs were seen as heralding a new era for African democracy, and the optimism was often based on technologically determinist assumptions that the introduction of new technologies *per se* will bring about social change and deepen democratic participation. In theorizing the African digital public sphere, postulations of what ICTs might mean for African societies frequently drew on older modernization paradigms of "development": a universal, linear trajectory of progress was assumed to be facilitated through media, consisting of various stages that could be "leapfrogged" by NMTs. Recent theorizing however returned to older questions about access, inequality, power and quality of information (Mudhai et al. 2009:1).

Sometimes the more recent enthusiasm for mobile phones in Africa bears resonances of the early evangelism around the use of the Internet for democracy in Africa. The excitement generated by mobile phones seems however more justified because it has already been proven that mobiles are much more accessible than other ICT platforms such as personal computers and fixed-line telephones. Phones are also more versatile than older ICTs. Because Internet access is but one of the functions of mobile phones, their success can be measured by more criteria than just how they make good on the earlier promises of the Internet for democracy and development in Africa. Earlier indicators of the Digital Divide, such as Castells' observation (1998/2010: 94-5) that there were more telephone lines in Tokyo or Manhattan than in the whole of sub-Saharan Africa, and that the continent is therefore 'excluded from the information technology revolution', have therefore been put under erasure if not made obsolete by the ubiquitous mobile phone.

Costs Remain a Barrier

There is no doubt that mobile phones have changed social practices around the continent. Southwood (2008) typifies the reshaping of the social geography of Africa as a result of the connectivity provided by mobile phones as 'less walk and more talk'. The decreased impact of spatial distance on what we may call social, economic and political distances has been well-documented in case studies from around the continent. However, the nature and extent of these changes are not uniform, nor are they equally distributed. High penetration of mobile phones into the market should not automatically be taken as an indication of high *usage* of phones, nor as having an unqualified positive effect on the social lives of Africans. A recent study (Montez 2010) of mobile phone use in Zambia found that 63% of users agreed strongly that a mobile phone is expensive. Even in a country such as South Africa, with one of the highest penetration rates on the continent (Smith 2009), call costs are "prohibitively high" (Duncan 2010). It is especially the poor customers in this country, using pay-as-you-go services rather than contracts, who are worst hit by the exorbitant rates charged by phone companies. One study (Duncan 2009) found that informal settlement dwellers in a South African town spent 27.5% of their income on communications costs, using money set aside for essential items like food to buy airtime. Women were more adversely affected by men by communications costs, leading to a knock-on effect on children and the infirm, for which women are often the care-givers (Duncan 2009). These findings mitigate the euphoric notions of mobility, independence and individuality often characterizing discourses around mobile phones in Africa. In celebrating the mobile revolution taking place in Africa, it should not be forgotten that many Africans are still not storming the barricades.

But again there are ways of viewing the political economy of mobile use as a glass half full rather than half empty.

Indeed, “Africa is truly a crucible for mobile phone innovation and entrepreneurship” (Etzo & Collender 2010), and users often display remarkable creativity in overcoming the obstacles put in their way by exorbitant pricing structures. For instance, where connectivity costs might restrict users to ‘beeping’ or ‘flashing’ (these messages are called ‘please call me’s’ in South Africa) , they develop a code or protocol amongst themselves to enable them interpret such beeps as messages with varied meanings (see Duncan 2009; Etzo & Collender 2010:666).

Instead of inserting the technology into an African context as if the technology itself is inherently transformative and audiences everywhere will respond to it in the same way, these entrepreneurs seek first to understand the users within a given culture, their needs, their limitations and their everyday lives, and then go out to adapt this technology to suit the context – not the other way around.

It is the examples of creative adoption and adaptation by African users of mobile phones that we should concentrate on when attempting to answer questions regarding the potential of mobile telephones for democratic citizenship and everyday understandings of political participation in Africa. The problem with concentrating on penetration rates and demographic statistics around the uptake of mobile phones in Africa is that these figures may not necessarily tell us much about how mobile phones are actually used. Ekine (2010:x) reminds us of how misleading statistics may be, especially in developing contexts such as Africa where media usage may occur in patterns that differ quite radically from those in the Global North. Too often, discourses around mobile phones make a interpretive leap from *access figures* to speculation about the *impact* of mobile phones on democracy and development. This leap from *access* to *effect*, bypassing the unpredictable and highly contextualized usage of phones in everyday life, then lead to either over-optimistic conjecture about the potential impact of mobile phones, or moral panics about their detrimental influence.

Conclusion

The challenge to understand the significance of mobile telephones for African democracies, including alternative/activist politics and processes of development and social change, is to explore how these broader discourses are related to everyday practices. By establishing these links, we can arrive at an understanding of what politics mean in the day-to-day lives of people, instead of trying to establish the often intangible impact mobile phones on broader processes such as elections. When we turn our focus to these intersections of the popular and the political, to the practices of 'everyday democracy' (cf. Wasserman 2010), we can see mobile phones as not merely technologies *transmitting* democratic and civic information, but also as the location where people are *transgressing* the hitherto fixed boundaries of what counts as political participation or civic identification.

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This chapter is a summary of a keynote address presented at the workshop 'Mobile phones: the new talking drums of everyday Africa?' at the Afrika Studiecentrum, Leiden, The Netherlands in December 2010. A full, revised version will appear in the journal *Popular Communication.*

6. Democracy and Politics: Shared Responsibility the Key for Africa's Success Increased Revenues Need to be Channeled to Social Needs by Kofi Annan and the Africa Progress Panel

Africa is now being described as a new economic frontier. Barely a week goes by without news of the discovery of more oil, gas, precious minerals or other resources. Deals are being signed by African countries with an ever-broader array of partners, including from China, the Far and Middle East, South Asia and Latin America.

Trade is growing, both within the continent and internationally, including with the global South. Turnover of African corporations and banks is increasing. Domestic revenues, foreign direct investment, remittances and official development assistance (ODA) have all climbed steadily over the last decade, although the upward trajectory dipped in the wake of the global financial and economic crisis. After a gloomy year, economic growth rates are predicted to climb again, and restore the continent's place as one of the fastest-growing regions of the world.

All of this begs some obvious questions. Despite some extraordinary successes, why does progress on achievement of the Millennium Development Goals (MDGs) remain so slow, so uneven? Why do the absolute and relative numbers of people living in poverty remain so high? Why do so many people face food and nutrition insecurity, joblessness, and minimal access to basic services such as energy, clean water, healthcare and education? Why are so many women marginalised and disenfranchised? And why is inequality increasing?

At issue is not just the ability of African countries to attract and mobilize revenues, but their political determination and capacity to use what revenues they have to achieve results for people. Economic growth rates and increased trade are necessary but insufficient for genuine progress, which means sustained improvement in the quality of life of every African woman, child and man. However, growth can be exclusive, reinforcing or resulting in inequality and social tension; growth can fail to create opportunities or address the insecurity faced by families in rural areas and of people in search of work in the continent's burgeoning cities. This kind of growth does not necessarily represent progress.

It cannot be said often enough that Africa is not homogenous; it is raucously diverse, a celebration of different cultures, traditions and landscapes. Some African countries are blessed with resource wealth; others less so or not at all. But they all share a common challenge: investment in their citizens' productive capacity and in public goods and services that will broaden the opportunities and benefits of growth for all.

The ingredients of success are not a mystery. Climate change is adding a new dimension, and urgency, to the challenge; sustainable development and job creation must be anchored in low-carbon growth, buttressed by attention to disaster-risk and vulnerability reduction. But it is not altering the fundamentals: the critical importance of political leadership to set and drive plans for equitable growth and poverty reduction; the importance of building the technical, management and institutional capacity, including planning, legal and negotiation skills, to mobilize revenues and to implement plans; and the centrality of good governance, the rule of law and of systems of accountability to ensure that resources are subject to public scrutiny and to keep political and business leaders on their toes.

Over the last decade, our understanding of what makes development effective has increased. Good, even visionary agendas have been formulated in every field, including infrastructure, food and nutrition security, women's empowerment, health systems, education and governance. We have a better appreciation of the centrality of domestic revenues, the importance of unleashing entrepreneurship and an enabling environment, of responsible investment, the need for concerted international action to address illicit financial flows and corruption, the value of public–private partnerships, and of the most strategic use of ODA to support national and regional development plans.

Lack of knowledge and shortage of plans are not the problem. Lack of funds *per se* may not be the problem either, given the continent's vast natural and human resources and the ongoing, often illicit, outflow of wealth. Political will is the issue, both in Africa and internationally.

Ten years ago, the Organization of African Unity (OAU) got behind the vision of a group of influential African leaders to promote a poverty-busting development agenda; the African Peer Review Mechanism was equally innovative. Today, a number of leaders stand out as champions of development, but they are still a minority, their achievements overshadowed by stories of other leaders' personal enrichment and authoritarian behaviour.

Internationally, there are understandable concerns that the consensus around development has been eroded by the global economic crisis. Everything must be done to keep hard-won commitments of the Millennium Declaration, the Monterrey Consensus, and the Gleneagles Declaration front and centre in international policymaking. One way of measuring this commitment is by whether ODA levels are being met. Many OECD and G8 countries are doing so; others are falling badly behind, raising doubts about their credibility at top decision making tables.

These shortfalls do not result from a decrease in human solidarity and sympathy between ordinary people around the world, which, I believe, is as solid as ever. Nor can it be ascribed to budgetary constraints alone, given the relatively modest sums involved. It comes from politicians' failure to communicate the imperative of putting the needs of least developed and African countries at the heart of global institutions and policies. The arguments for doing so, whether relating to climate change, food and nutrition security, trade, intellectual property, fighting crime, or investment in health and education, are not just ethical or altruistic, but practical and in the self-interest of richer countries.

More can be done by African leaders, in government, business or civil society, to advocate for development policies and resources, including with politicians and tax-payers in richer countries, whether the big emerging economies or traditional donors. Their voice is vital to the case for maintaining promises relating to ODA, which, despite what its detractors say, remains pivotal as a source of investment in public goods and services, particularly for people in resource-poor and fragile states.

In last year's APP report we set out an agenda for progress on the basis of Africa's experience and expectations. We called upon African leaders to drive that agenda, and upon their international partners to support it. We argued that the successes that African countries have achieved demonstrate conclusively that Africa's development goals are attainable. We underlined the responsibility that Africa and its partners share for progress, and the need for a stronger sense of mutual accountability – for good governance, responsible use of resources to promote sustainable and equitable growth, and for achievement of individual Millennium Development Goals. We stand by this.

We hoped that last year's economic crisis would serve as a wake-up call for African leaders and their international partners. In exposing the connections between poverty, the food, fuel and climate-change crises, it would surely underline the importance of more holistic rather than piecemeal responses to promoting sustainable economic growth and reducing vulnerabilities.

Has it done so? The evidence is mixed. The crisis has highlighted a number of worrisome trends, not only on the ground – such as growing inequality, setbacks in achieving the MDGs, vulnerability and food insecurity – but also more broadly, including concerns that economic contraction and belt tightening squeezes out commitment to human development.

It has exposed deficits in both African and global governance. Recession and joblessness may not cause coups and conflict but they certainly add tension, particularly when political grievances are overlaid by a sense of economic exclusion and injustice. Globally, the crisis has accelerated architectural reconfiguration – but not necessarily in ways that benefit the least developed or African countries. Will the G20 have Africa as prominently on its radar screen as the G8 has had?

Measuring commitment by politicians is not easy. The volume and share of financial resources set aside for development is one objective yardstick, whether domestic revenues by African countries or ODA by members of the Organisation for Economic Cooperation and Development (OECD). By that measure, the momentum generated in the first decade of the new millennium, particularly around the New Partnership for Africa's Development (NEPAD) and Gleneagles, continues, but now appears to be tailing off.

The challenge is to articulate a compelling case for global solidarity and equitable growth – one that embraces but goes beyond ODA figures. Due to climate change, this may happen sooner than expected.

A sense of disappointment, if not failure, has followed the COP 15 Copenhagen Summit and its Accord. But the scientific and physical evidence affecting the lives and livelihoods of millions of people will not go away. The impact of rising temperatures becomes more obvious daily. The prospect is of a transformed political and development landscape, in which necessity rather than altruism will compel politicians to persuade their publics, finally, of the imperative to invest in sustainable global development.

Our report identifies these and other tectonic shifts, including the ascent of the G20, the increasing political and economic prominence of China, India and Brazil, and the potential of communication technology to alter fundamentally the policy landscape in which Africa's development takes place.

In our current 2010 report we are looking back to assess the progress Africa has made over the last five years, placing special emphasis on both the promises made and kept, as well as the various blueprints for progress agreed. We then look ahead and identify six

priority areas for action, three for African policymakers and three for their international partners.
Given the diversity of the continent's 53 states and the diverse nature of their economies, these prioritizations are rather broad in nature. Our recommendations need to be adapted and adjusted to country-specific circumstances. We are nonetheless convinced that, if implemented, they will contribute to the delivery of measurable results that will increase the well-being of, and opportunities for, all Africans.

Africa's growth needs to be measured not just in GDP figures but also by the degree to which it brings social benefits for its entire people. Responsibility for driving equitable growth and for investing in achievement of the MDG targets rests firmly with Africa's political leaders. Civil society can be an ally if given the space to ensure that revenues and growth are not abused or limited to elites but shared more broadly and invested in jobs and public goods. The approach and actions of the private sector and of Africa's international partners, traditional and more recent, can also make a decisive difference to leaders' success.

If this goes wrong, Africa may face the prospect of greater inequality, more conflict and a perpetuation of chronic poverty and marginalization. If this goes right, the future is bright. The key is shared responsibility, and mutual accountability, between African leaders and their partners. Not just Africa's people, but those of the whole world stand to benefit.

Table 1: **Key Findings and Recommendations from the 2010 Africa Progress Report**

Sustainable Economic Growth and Poverty Reduction

Africa's vast resources need to be captured for the benefit of its people	**Women need to be given greater access to and control of Africa's resources**
Africa's land and natural wealth is immense, and increasing in value. The ongoing discovery of new oil and gas fields and other precious resources makes transparent and effective management even more important. Revenues must be used to promote sustainable and equitable development.	Women's access to, control and ownership of resources and revenues from them, whether land, natural or productive, remains inadequate across Africa. The resultant underinvestment in and by women severely hampers both the scope and quality of progress.
We call upon the leaders of countries fortunate enough to be endowed with natural resources to implement commitments such as UNCAC and EITI.	We call on African leaders to implement plans to improve women's access to and control of resources and revenues.

African countries need to climate-proof their development strategies	**Women need to be at the centre of climate-proofed development strategies**
Climate change will increase the cost of MDG attainment – in food production, health, water, energy, infrastructure and other areas – and will have disproportionate effects on women and the poor. It cannot be treated as a stand-alone issue.	Impacts of climate change are not gender neutral. Women bear a major responsibility for household water supply, energy and food security which, combined with inhibitions rooted in traditional roles, their unequal access to resources and limited mobility result in them being disproportionately affected. At the same time, they have proved effective in mobilizing communities to respond to and prepare for climate change and natural disasters.
Efforts such as ClimDev need to be accelerated by African and international organizations, including the AfDB, the UN and the World Bank, to support the climate-proofing of development and poverty-reduction strategies, and to prepare bankable, job-creating, low-carbon-energy, infrastructure and other programmes.	Governments and other stakeholders need to ensure that climate change initiatives build on women's experiences, knowledge and coping capacity.

Investment in agriculture and rural public goods must increase	**Empowered women are key to increasing agricultural productivity**
More than 70 per cent of Africans depend on agriculture for their livelihoods. Yet agriculture is not realizing its potential either as a driver of poverty alleviation and economic growth, or to ensure that everyone has access to sufficient food and a balanced diet. Hunger and chronic malnutrition are widespread, and accelerating climate change threatens to reduce productivity further.	In Sub-Saharan Africa, women produce up to 80 percent of all basic food products, both for household consumption and for sale. Given the key role of women in the agricultural sector, improving their situation, particularly through bettering their access to productive assets and ownership rights, means progress for the sector and for the economy as a whole.
We call on Africa's leaders, their international partners, and the private sector to implement CAADP compacts and thereby prioritize investments in agriculture, including by increasing access to markets.	We call on African leaders to prioritise rural women's access to land, including land rights, information, credit and financial support, insurance and extension services.

Models for business engagement should be advertised and scaled up	**African leaders need to harness women entrepreneurship**
There is a growing body of experience as to how business can work with governments, development actors and local communities to stimulate entrepreneurship, job-creation, trade, and investment in public goods and services. Practical lessons and emerging opportunities need to be captured by the network of African and international organisations such as Business Call to Action, Corporate Council on Africa, and Frontier 100 that are promoting business engagement in development; these should be used as the basis for incentivising and accelerating public-private partnerships. .	Women entrepreneurs are playing an increasingly prominent role in many African economies, both formal and informal, despite the many constraints they continue to face. We call on African leaders to implement the recommendations from the African Women's Economic Summit and to ensure a conductive regulatory environment through the inclusion and protection of women in the formal economy. CEOs can do more to harness and develop the skills and energy of the continent's women through overcoming entrenched patterns of employment, promotion, and enumeration practices, increasing the share of women in management and board positions, and promoting skill development.

African leaders need to incentivize connectivity and the use of ICTs	**Connected women are key to developing strong knowledge economies**
Despite significant progress, Africa still lags behind in terms of both information hardware and the use of information and communication technologies (ICTs) in management, entrepreneurship, development, social networking and accountability. But Africa's "connectivity deficit" also creates opportunities to leapfrog expensive and outdated technology and to learn from experiences elsewhere.	Owing to cultural barriers and lower literacy rates, women have less access to ICT than men. Enhancing women's participation in the information economy will result in a range of benefits such as more competitive technology sectors and a better trained workforce. It will also facilitate the development of an information economy and enhance the ability of the poorest and most marginalized people, especially women and girls, to exercise their human rights.
We call upon African leaders in both the public and private sectors to advance results-oriented partnerships around plans to connect the continent, including schools, health centres, farmers, local authorities and the media.	We call upon business leaders and regulators to track, encourage, and report on women's access to and use of information and communication technologies.

Social Progress

Now is the time for a big push on the Millennium Development Goals	Women need to be given a greater say in development planning
Investment in education, health and food security is the basis for economic growth and human security. MDG progress over the next five years can yield enormous social and economic dividends, enabling communities and countries to achieve greater self-reliance. The last decade has seen many successes in progress towards MDG-based targets, including in the most resource-deprived and insecure circumstances.	Women and girls are still insufficiently engaged and consulted in the design, management and evaluation of initiatives and programmes that are of direct relevance to them. This is particularly detrimental as meeting gender-specific targets such as those on maternal and child health as well as education are the backbone of MDG achievement.
These successes need to be scaled up and replicated, drawing upon proven interventions, harnessing the transformative potential of women's empowerment, information technologies, and new partnerships – with the global South and the private sector. The MDG Summit in September 2010 is the ideal opportunity to mobilize renewed support.	Action by governments, business and civil society to set targets for women's participation at all levels, and to gather and disaggregate data, is needed. This will contribute to MDG achievement, as well as strengthen women's knowledge and exercise of their human rights.

Education is the bedrock of progress	**Educated women will empower Africa**
All the available evidence points to the fundamental importance of education as the driver of social, economic and political progress. Great strides have been made in increasing access to primary education, but wide gaps remain both in secondary and tertiary education and in completion rates across the board. Adequate funding for comprehensive national plans is the core issue.	Education for girls has a direct positive impact on their health, social, and work prospects as well as on their families, communities and economies. Education also increases the ability and willingness of women to exercise their rights and participate in decision-making. Significant gender gaps persist at all educational levels. This not only penalises them but is a major brake on Africa's economic development and progress towards the MDGs.
We urge African political and other leaders and their international partners to redouble efforts to mobilise resources, notably through the Education for All Fast-Track Initiative.	Gender-equity laws, policies, and targets in education need to be carefully monitored and publicly communicated including to any by politicians, the media and civil society.

Strategies for economic growth must address poverty and inequality	**Gender discrimination is a major brake on development**
While the evidence base is thin, and reliable statistical data scarce, it is apparent that inequalities within African countries are increasing and the benefits of economic growth are very unevenly shared. This is both unjust and potentially dangerous.	Societies that discriminate on the basis of gender pay the cost of greater poverty, slower economic growth, weaker governance and lower living standards. The growing feminization of poverty and the long standing inequalities in socio-economic and educational opportunities between women and men need to be urgently addressed.
Success in fighting poverty and inequality is essential for durable progress and stability; we call on African leaders to use their armory of fiscal and social policy instruments to prioritise public goods and services that benefit and create opportunities for all citizens.	Strategies for growth and poverty reduction need to be designed, implemented and monitored with clear gender equity standards and targets and adequately resourced mechanisms for monitoring, evaluating and publicly communicating progress, including to politicians and the media.

Political Leadership and Governance

We need to move from agenda-setting to implementation	**Implementation of plans for women's empowerment need to be prioritised**
Over the last decade, Africa and international partners have put in place many sensible, often visionary agendas, plans and blueprints for action – whether relating to governance, regional integration, or investment in agriculture, health and education.	Advances in policies and legislation have not yet resulted in sufficient progress on gender equality and women's empowerment. Weak institutional capacities and insufficient prioritisation of resources undermine the effectiveness of existing laws.
We call on African leaders and their international partners to accelerate the implementation of these plans on the basis of agreed time-bound targets. We call upon Africa's partners to support the prioritization of initiatives and plans rather than encourage their proliferation.	We call on African leaders and their international partners to review and increase the level of resources earmarked for the implementation of policies and plans related to women's rights and empowerment.

Good governance and accountability will determine Africa's future	Women improve accountability
The quality of governance Is a key determinant in political and social stability, equitable economic growth, and poverty reduction. Systems of financial and political accountability are essential if those in authority are to remain responsive to citizens and ensure that revenues are used for the public good. The right of civil society including the media and citizen's groups to play a watchdog role needs to be legally protected.	Women add value to discussions on policy and the use of resources. As cornerstones of families and communities, women have a keen interest in ensuring that resources are fairly and wisely used. Women tend to be more efficient in managing household budgets, loans and savings, if given the opportunity. They are also highly effective as senior executives in the public and private sectors, bringing fresh and alternative perspectives to men.
We call upon African leaders to heed the commitments enshrined in the AU's Constitutive Act and other landmark conventions relating to governance and transparency, notably by cooperating with and implementing the recommendations of NEPAD's African Peer Review Mechanism.	We call upon government, business and civil society organisations to adopt and implement strategies for ensuring prominent roles for women and where relevant to expand training and recruitment opportunities, including at the most senior levels.

Africa needs to amplify its voice in the international architecture	**African women must be adequately represented in international fora**
For a continent with over a quarter of the world's states and a billion people profoundly affected by global dynamics, Africa is underrepresented in many formal and informal international processes, including in new fora emerging in the global South. Where it does have adequate representation, Africa often lacks negotiation capacity and a coordinated position.	If Africa is underrepresented in many formal and informal international processes, Africa's women are even more so. Women need representation at all political levels, including in the international arena. Greater representation of women creates synergies, reduces apathy and ensures that addressing the concerns of the vulnerable remains a high priority.
We call on Africa's leaders to be more assertive in making the case for reform of global governance structures, and to make them more representative, supportive and effective. Negotiation capacities need to be strengthened around concerted positions, notably relating to climate change, trade and the MDG process.	We call on African leaders to prioritise equal representation of women in all sectors of governments and the civil service, both on the domestic and international stage, including in negotiation teams, regional and global missions and delegations.

Regional integration must be accelerated	Regional solidarity among women adds value
The last decade has seen an unprecedented deepening of regional cooperation including in trade, peace and security, energy and infrastructure.	Feminisation of institutions brings radical change to the way in which women's and other issues are handled. Cross-border women's networks bring a fresh and results-orientated dimension to all aspects of economic, political and social cooperation.
We call on African leaders to accelerate this positive trend, notably by implementing the NEPAD Africa Action Plan, in order to overcome the developmental barriers posed by Africa's political and geographic fragmentation, and to reap the benefits of economies of scale and enhance the continent's competitiveness in the global economy.	We call for an increase in women's participation and feminisation of regional cooperation networks and institutions. Regional cooperation can strengthen national efforts to empower and protect women and advance their rights.

Joint efforts to provide security need to be strengthened and adapted	**Protection of women should be at the heart of security arrangements**
As evidenced by the ongoing operationalization of the African Peace and Security Architecture, the continent's states and regional organisations have made great progress in institutionalising efforts to address the scourges of war and conflict including injustice and impunity. However, both remain widespread and new forms of insecurity, including atomized and fluid forms of cross-border violence, the expansion of ungovernable spaces, and the rise of organized crime and trafficking aggravate the suffering of millions of people.	Conflict brings suffering to everyone involved. Women are particularly vulnerable to and affected by both the short- and long-term consequences of conflict. Sexual abuse and incidents of gender-based violence tend to increase due to social upheaval and mobility, disruption of traditional social protection mechanisms, changes in gender roles, and widespread vulnerabilities.
We call on African leaders to strengthen their cooperation with each other and the international community to address new forms of insecurity and broaden existing security mechanisms to take changing realities into account.	Governments and international organisations must adopt a zero tolerance approach to sexual and other forms of gender-based violence, and to enhance the attention and resources dedicated to addressing sexual violence. They need to deal with violations against women and girls and crimes of a sexual nature as a category of violations within the criminal justice system.

Partnerships

African leaders need to advocate the fulfilment of commitments	Commitments to Africa are commitments to its girls and women
The global economic crisis may erode the hard-won international consensus on development as many countries turn inward and commitments are postponed or even abandoned. African leaders need to honour their own commitments on good governance and investment in public goods and services and, on that basis, build a stronger international case for shared responsibility and mutual accountability for economic and social progress in Africa. Success will benefit not only for Africa, but the world.	If governance and development commitments by Africa's 52 male Heads of State and by their international counterparts are not honoured, women are hardest hit. Information on women in general and gender disaggregated statistics in particular are weak. Without this data, assessing the status and wellbeing of women will remain imprecise and policies inadequate. Monitoring women's empowerment and welfare is a shared responsibility but greater participation by women in government will increase the attention it receives.
We recommend acceleration and coordination of ongoing efforts in Africa and beyond to track progress, encourage transparency and improve information flows, including through the establishment of a Mutual Accountability Index as a public resource and tool.	In addition to improving statistical and data gathering capacity, practical measures are needed by governments and their partners to encourage and support women in legislatures, for example with dedicated funding for political parties to field female candidates.

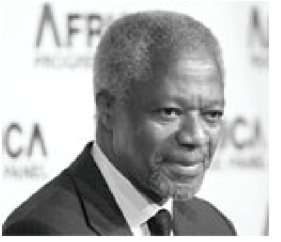
African leaders need more inclusive and results-oriented partnerships	**Women's empowerment should be a specific objective for partnerships**
African policymakers can be more assertive in building effective and mutually beneficial partnerships around their countries' social and economic development goals. This applies to all partnerships, whether with traditional or "new" investors and donors, whether governments or the private sector. Immediate opportunities include south-south partnerships and engagement with the private sector to deliver social and environmental benefits.	Achievement of gender equity must be one of the specific objectives around which partnerships are formed, whether with public or private sector investors, donors and international financial institutions. Desired results need to be set and quantified, with regular monitoring and reporting to leaders and through the media.
We call on leaders to use their national and regional growth and development plans as the basis for practical partnerships around specific objectives such as food security, training, job creation, infrastructure, and low carbon energy generation.	We call upon political and business leaders to ensure that goals and targets relating to women's participation and empowerment be systematically included in partnership agreements, regardless of the sector.

Finance and implementation plans for climate-resilient development need to be fast-tracked	**Gender intelligence is central to climate resilient development**
Plans by industrialized countries to mobilize additional resources for climate change need to be accelerated, whether through a Green Fund or related initiatives. The momentum generated around the development of a common African position at Copenhagen must be maintained, particularly with regard to the management and disbursement of funds, insisting upon their additionality and predictability, and the importance of avoiding artificial distinctions between adaptation and development.	Growing awareness of the urgent needs generated by climate change can be used to focus attention on, and strengthen, women's role in development, and to create more opportunities for the achievement of gender equity. Understanding of the impact of climate change on girls, women and gender dynamics is hindered by lack of reliable information and resources; the design and implementation of appropriate policies and strategies is impaired as a result.
African countries and regions, with support from the UN and IFIs, need to ensure that plans and capacities are in place to use additional resources effectively around proven interventions and bankable projects.	Governments and partners must earmark funding for the collection, research and analysis of gender disaggregated data, and ensure gender intelligence is used in formulating climate change strategies and funding decisions.

Africa's partners need to increase the coherence of their policies	**Policy coherence must be designed with Africa's women in mind**
Africa's investment partners and donors have official policies towards Africa, usually expressed through the mission statements and goals of development agencies and financial intuitions. However, these are not necessarily coordinated with policies in other domains that affect African countries' ability to strengthen governance, retain economic value and compete internationally.	Ongoing and envisaged efforts to strengthen the degree to which Africa's economic and governance needs are at the heart of policies need to be assessed in the light of gender equity objectives, whether by partners, governments or Africa's premier intergovernmental bodies, including the AU, RECs and UN agencies.
A number of OECD countries have reviewed their policy coherence; we call for this process to be extended and deepened, with greater African involvement, to ensure a more joined-up approach by all partners.	We recommend that this be done systematically, with a view to identifying ways in which the needs and priorities of African girls and women can be put at the heart of efforts to strengthen mutual accountability among partners for women's empowerment.

The article is based on excerpts of the 2010 Africa Progress Report.

Contributors



Kofi Annan is the former Secretary General of the United Nations and Nobel Laureate. Since leaving the United Nations, Kofi Annan has continued to press for better policies to meet the needs of the poorest and most vulnerable, particularly in Africa and not only in his capacity of Chair of the APP but also as an important part of the work of the Kofi Annan Foundation. In addition to this, he also Chairs the Alliance for a Green Revolution in Africa (AGRA), and leads the Prize Committee of the Mo Ibrahim Foundation and an active member of the Elders. He is also a Board member, Patron or Honorary member of a number of organisations, including: the UN Foundation, the World Economic Forum, the Carnegie Endowment for International Peace, the Carnegie Corporation of New York, the Club of Madrid and the World Organisation Against Torture. Mr. Annan currently serves as the Chancellor of the University of Ghana, a Global Fellow at Columbia University in the United States, and Li Ka Shing Professor at the Lee Kuan Yew School of Public Policy at the National University of Singapore. He is the Chair of the Africa Progress Panel. The **Africa Progress Panel** consists of a group of distinguished individuals whose objective is to track and encourage progress in Africa, and to underscore shared responsibility between African leaders and their international partners for sustaining it. Panel members are Tony Blair, Michel Camdessus, Peter Eigen, Bob Geldof, General Olusegun Obasanjo, Graça Machel, Linah Mohohlo, Robert Rubin, Tidjane Thiam and Muhammad Yunus. A Geneva-based Secretariat supports the Panel in three main areas: research and policy; advocacy and communication; and preparation of APP core products, including the annual Africa Progress Report; a fortnightly news bulletin; and policy briefs on timely issues.

John Battersby has served as the UK Country Manager of the International Marketing Council of South Africa (IMC), a public-private partnership mandated to position South Africa as one of the highly considered, non-traditional markets in terms of world trade, investment and tourism since January 2004.

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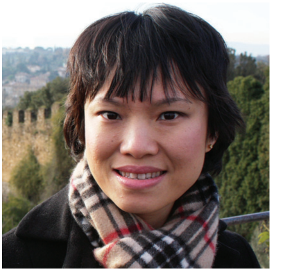
Robert Govers is currently serving as Adjunct Associate Professor, holding the Visit Flanders Chair in Tourism Management of the Consortium University of Leuven, Belgium, where he was also Project Manager at the Flemish Centre for Tourism Policy Studies. In addition, he is a visiting faculty member with The Hotel School, The Hague; Rotterdam School of Management; IULM University in Milan; the University of Turin; and several institutes in Dubai. He has co-authored many publications in the field of place branding and image, tourism, hospitality and quality management. As a project manager, Govers has been involved in many consultancy projects for reputable organizations such as IATA, the European Commission, the Flemish government and various Dutch ministries and tourism promotion boards, and has taught courses on place branding, marketing, service marketing, strategic services management, and research methods.



Yingni Lu is a London-based strategy and business development professional, with a unique skills set that combines a B.Eng. in Environmental Engineering from Tsinghua University in China, an MBA with distinction from Imperial College, and solid experience in clean technology and energy sector in the UK and China. Yingni Lu has previously provided consultancy for Beijing Science & Technology Commission on technology needs in renewable resources during the period of "11th Five-Year Plan" (2006) and strategic consultancy EDF Energy (2010). Yingni Lu has also conducted research at ICUK (2010), part of Queen Mary Innovations, to advise clean technologies to enter emerging markets. She writes for the online magazine ReconnectAfrica

The Monitor Group is a global firm that serves clients through a range of professional services – strategic advisory, capability building and capital services – and integrates these services in a customized way for each client. The firm employs or collaborates with some of the world's foremost business experts and thought leaders to develop and deliver specialized capabilities in areas including competitive strategy, marketing and pricing strategy, innovation, national and regional economic competitiveness, organizational design, and capability building. Monitor was one of the first US firms to open an office in South Africa immediately after the end of apartheid, and they continue to be deeply interested in the development of the African continent as a whole. Their work on urbanization, economic development and global macro-economic scenarios convinces us that Africa will be one of the main sites of the next wave of global economic development

Marrianne Nebbe is a senior researcher at Media Tenor South Africa in Pretoria. She is completing her Masters in Research Psychology from the University of Pretoria in South Africa in 2011 and is writing her dissertation on why women in South Africa choose to remain childfree in the South African Context. Her academic roots are firmly entrenched in gender studies with Feminist Social Constructionism being her preferred research paradigm. Before joining Media Tenor as an intern in 2008, Marrianne worked as a field worker for a research project entitled "Tracking Justice: The attrition of rape cases through the Criminal Justice System in Gauteng". Apart from an affinity for gender research, she is particularly interested in the role that media play in creating, sustaining and changing dominant discourses in society.

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