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Report on Africa's Regional Integration Agenda

CONTENTS

I. INTRODUCTION

1. Regional integration, which is one of the key priorities of African leaders, remains an important driver of Africa's economic growth, development and poverty reduction. Various regional and subregional entities are in advance stages of regrouping themselves, using several methods of regional integration and cooperation arrangements. The general consensus is that regional integration and cooperation is, perhaps, the most appropriate way of improving the low levels of intra-African trade as well as international trade. Regional integration and cooperation will largely derive substantial economies of scale with respect to various activities typically associated with the expansion of trade and overall economic growth.

2. Although regional integration has a key role in promoting trade among blocs, African countries, which are characterized by small economies, have not significantly reaped the benefits of regional integration. Intra-African trade, for example, remains weak and undiversified, hobbled by supply-side and infrastructure bottlenecks and other trade barriers. Transport links are much improved in some subregions, but they are still a major problem in many parts of Africa. The Regional Economic Communities (RECs), which are the institutional building blocs of the integration process, also suffer from a number of difficulties including insufficient financial resources to implement their numerous programmes. Mainstreaming and implementation of regional integration activities and programmes has also not been particularly effective. Yet, effective implementation of regional integration activities and programmes in Africa would indeed assist in reducing the high transport costs currently being experienced by a number of countries, particularly landlocked countries, as transport costs are estimated to be as high as 77 per cent of the value of exports[1].

3. However, efforts remain steadfast at both continental and subregional levels to address the various challenges and constraints currently affecting implementation of the regional integration agenda in Africa. A number of decisions and protocols have been adopted by member States, since the establishment of the Organization of the African Unity (OAU) now the African Union (AU). Despite the adoption and implementation of some of the decisions and protocols, the results achieved in forwarding Africa's integration remain mixed. Whereas certain RECs have achieved tangible outcomes in some specific sectors, others have had relatively limited results in terms of the objectives of the Abuja Treaty.

4. Some RECs are making good progress in terms of the different milestones of the Abuja Treaty, though others are lagging behind. Coordination and harmonization of activities across RECs at different speeds therefore become difficult to manage, which in turn slows down the process towards a common vision of the AEC. AU has now adopted a Minimum Integration Programme (MIP) as a means of helping and strengthening the RECs to march in unison towards attainment of the AEC.

5. Against this backdrop, this paper has been organized as follows: section I gives the introduction; (II) Developments at the REC/Subregional level; III Developments in Other key Areas of Integration; and IV Overcoming Key Outstanding Challenges. Section V concludes by providing recommendations towards addressing the challenges.

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[1] Assessing Regional Integration in Africa (ARIA-I), chapter seven. ECA Policy Research Paper.

II. DEVELOPMENTS AT REC/SUBREGIONAL LEVEL

6. Progress towards integration is mixed across the eight RECs: implementation of the Abuja Treaty is currently at stage 3 (establishment of Free Trade Areas (FTAs) and Customs Unions at the regional level by 2017). The Common Market for Eastern and Southern Africa (COMESA), the East African Community (EAC), the Economic Community of Central African States (ECCAS), the Economic Community of West African States (ECOWAS) and the Southern African Development Community (SADC) have reached FTA status and launched Customs Union programmes leading to the establishment of their Customs Unions before 2017.

7. EAC is the only REC to have consolidated its Customs Union, which entered into force on 1 January 2005; it is also the only REC to have launched its common market, in June 2010. The Intergovernmental Authority on Development (IGAD) and the Community of Sahelo-Saharan States (CEN-SAD) remain at stage 2 (coordination and harmonization of the activities of their member States. However, in an attempt to revitalize its integration process, IGAD recently adopted a MIP and is working towards the creation of an FTA. Table 1 provides a synopsis of the current state of play in relation to the milestones established in the Abuja Treaty.

Table 1: Progress as per Abuja Treaty milestones

	AT REC LEVEL								
Integration stages provided for by the Abuja Treaty	ECOWAS	COMESA	ECCAS	IGAD	CEN-SAD	EAC	SADC	AMU	Completion date provided for by the Abuja Treaty
First stage: (5 years) Strengthen RECs	Achieved	Achieved	Achieved	Achieved	Achieved	Achieved	Achieved	X	1999
Second stage: (8 years) Coordinate and harmonize activities and progressively eliminate tariff and non-tariff barriers	Achieved	Achieved	Achieved	X	X	Achieved	Achieved	X	2007
Third stage: (10 years) Free Trade Area and Customs Union	Launched	Launched	Launched	Not Yet	Not Yet	Achieved	Launched	X	2017
	AT CONTINENTAL LEVEL								
Fourth stage: (2 years) Continental Customs Union	Not Achieved	Not Achieved	Not Achieved	Not Achieved	Not Achieved	Not Achieved	Not Achieved	X	2019
Fifth stage: (4 years) Continental Common Market	Not Achieved	Not Achieved	Not Achieved	Not Achieved	Not Achieved	Not Achieved	Not Achieved	X	2023
Sixth stage: (5 years) Continental Economic and Monetary Union	Not Achieved	Not Achieved	Not Achieved	Not Achieved	Not Achieved	Not Achieved	Not Achieved	X	2028

Source: ARIA-V publication, UNECA, Addis Ababa, 2012

: X represents current levels of implementation of the stages of the Abuja Treaty

8. As can be observed in table 1, almost 75 per cent of the eight AU- recognized RECs have reached the third stage of the Abuja Treaty. Efforts are being made for the remaining RECs to reach this stage. It should be pointed out that some RECs continue to experience difficulties in accomplishing the second stage - coordination and harmonization of activities and, in particular, the gradual elimination of tariff and non-tariff barriers. IGAD, AMU and CEN-SAD are yet to achieve the second stage.

9. The EAC-COMESA-SADC Tripartite FTA was launched in October 2009, and it represents a significant milestone in terms of bringing the RECs more closely together. The Tripartite brings together 26 African countries, i.e. over 50 per cent of Africa's economies, with a combined population of nearly 600 million and an expected gross domestic product (GDP) of over US$ 1 trillion by 2013. Geared toward the establishment of a "grand FTA" between the three RECs, the Second EAC-COMESA-SADC Tripartite Summit in June 2011 registered the following achievements: signing of the Declaration launching the negotiations for the establishment of the EAC-COMESA-SADC Tripartite FTA; adoption of the Road Map for establishing the Tripartite FTA; adoption of the Tripartite FTA negotiating principles, processes and institutional framework; and agreement to develop a programme of work and road map on the industrialization pillar. The initiative has also helped to galvanize the interest of Africa's policymakers in establishing a much broader continental FTA. IGAD and the Indian Ocean Commission (IOC) are already applying most of the integration instruments adopted within COMESA. EAC and COMESA have a memorandum of understanding (MoU) to foster the harmonization of their policies and programmes, while COMESA and SADC have set up task forces to deal with common issues and invite each other to their policy and technical meetings. These intensive coordination and harmonization efforts ultimately helped pave the way for the establishment of the above-mentioned Tripartite FTA.

10. North Africa witnessed intense pro-democratic transitions with the 'Arab Spring' in countries such as Egypt, Tunisia and Libya. There is no doubt that these events have adversely impacted on implementation of the activities and programmes of CEN-SAD, including the establishment of a FTA.

11. In an effort to address the above challenges, Ministers of Foreign Affairs from the Arab Maghreb Union (AMU) member States had a meeting in March 2012 in Rabat, aimed at boosting cooperation in areas including the fight against terrorism and organized crime. Among other things agreed during the meeting, Algeria proposed to boost cooperation with North African neighbours against terror and organized crime.

12. In terms of trade, there has been little trade going on among the member States; intra-regional trade in AMU remains below 3 per cent of the total regional trade compared to the level of trade in other RECs. The establishment of a free trade zone or common market with more than 80 million consumers would create economies of scale and turn North Africa into an attractive investment hub. With its rich endowments in fuel, a number of other countries are seeking to strengthen their economic and strategic relations with North African countries.

13. In West Africa, there is an increasingly close relationship between ECOWAS and the West African Economic and Monetary Union (UEMOA/WAEMU), which has led to the adoption of a common programme of action on a number of issues, including trade liberalization and macroeconomic policy convergence. A Cooperation and Partnership MoU between West African intergovernmental organizations is being implemented, aimed at promoting and accelerating the coordination, complementarity and efficiency of the two bodies' respective common actions for the development and

integration of West Africa, as well as foster the principle of subsidiarity. In addition to the MoU, a new roadmap under the Joint Technical Secretariat arrangements and an operation manual have been adopted to guide the implementation of common projects.

14. Furthermore, ECOWAS has set up the West African Monetary Institute (WAMI) as part of the efforts towards launching a common regional currency. The Institute was designed to assist the non-CFA countries such as the Gambia, Ghana, Guinea, Liberia, Nigeria and Sierra Leone to establish a West African Monetary Zone (WAMZ), which would eventually merge with the CFA countries within UEMOA to form a single West African currency, *the Eco*. Progress towards this single currency has stalled due to several postponements stemming from the weakness of the existing national currencies and persistent budget deficits and fiscal challenges. To help accelerate progress towards the realization of the regional common currency, ECOWAS Commission facilitated the establishment of a special Task Force, consisting of senior officials of the ECOWAS Commission, WAMA, WAMI, UEMOA Commission and the Central Banks in the subregion. It has been mandated to identify a strategy for the attainment of monetary unification in the subregion leading to a single currency for all ECOWAS member States.

15. In Central Africa**,** ECCAS and the Central African Economic and Monetary Community (CEMAC) are increasingly working towards harmonizing their programmes, regarding FTAs. However, Central Africa has not made significant efforts in implementing decisions pertaining to a FTA, by taking into account the AU timetable within the framework of the Minimum Integration Programme (MIP) which expects the FTA to be operational at the regional level in 2012. The same observations can also be made in the area of free movement of people in Central Africa- there has been little progress in accelerating the process.

III. DEVELOPMENTS IN OTHER KEY AREAS OF INTEGRATION

16. Efforts are being made at continental, regional and national levels aimed at accelerating the regional integration agenda. Notable achievements in other key integration areas necessary for attaining the AEC and boosting intra-African trade include:

A. The Minimum Integration Programme (MIP)

17. It will be recalled that the MIP was adopted by Ministers in Charge of Integration at their Fourth Conference, held in Yaoundé, Cameroon, 7 to 8 May 2009, “as a dynamic strategic framework for the continental integration process”. A key achievement in this regard was the elaboration of an Action Plan for the first phase of the MIP, which was costed and submitted for consideration at the Fifth Conference of African Ministers in Charge of Integration (COMAI-V), held in Nairobi, Kenya, 8 to 9 September 2011. The Conference subsequently recommended that the costing should be revised. This was done and the revised MIP Action Plan was then presented to and endorsed by the AU-RECs-ECA-AfDB Coordination Committee at its ninth meeting on 25 January 2012 in Addis Ababa, Ethiopia**.** The document was commended with the recommendation that it should be transformed into a Business Plan to ensure its attractiveness to the private sector.

B. Intra-African trade performance

18. Intra-African trade has averaged 10-12 per cent over the past decade compared to 40 per cent for intra-North American trade, 63 per cent for trade within the European Union, 22 per cent for intra-Latin America trade, and 50 per cent for intra-Asian trade. However, on an individual REC-by-REC basis, intra-REC trade has been increasing in some RECs, such as COMESA and EAC. Furthermore, although the continent has a high and growing concentration of exports (and related production) in a few products, mainly primary commodities, some diversification has been taking place, primarily, though not exclusively, in Southern Africa and North Africa. Consequently, intra-African trade in manufactured goods is growing, and reached about 68 per cent of total intra-African trade in 2010 which is significantly higher than the 8.3 per cent share of manufactured goods in REC exports to the rest of the world.

19. The significance of intra-African trade cannot be over-emphasized; it can help the continent's industries become more competitive by creating economies of scale as Africa is characterized by a large number of very small markets, including landlocked countries which are highly dependent on neighbouring countries, in terms of access to maritime trading outlets. Through intra-African trade, value chains can be strengthened and transfer of technology and knowledge facilitated through spillover effects. Given that a number of African countries are landlocked, associated with smaller economies of scale, it is imperative that the continent continues expanding intra-African trade.

20. With regard to tariff barriers, the continent's average protection is 8.7 per cent. Even though African economies are very heterogeneous in terms of the tariff levels they apply and face, almost one-third of African countries both impose and face levels of protection that are lower than the average for the continent, which suggests that tariffs have been falling over the past decade, particularly on intra-African trade in capital goods, intermediate goods and total imports, except in the case of duties maintained on sensitive products.

C. Continental Free Trade Area

21. Although there has been a steady reduction in trade barriers over the past decade, intra-African trade still remains below the level necessary to make a significant impact on the continent's economic development and transformation. It is in this context that, at the AU Summit held in January 2011, a decision was taken to endorse the recommendation of the sixth Ordinary Session of the AU Conference of Ministers of Trade, held in Kigali, Rwanda, 29 October to 2 November 2010 and in Accra, Ghana in December 2012, to fast-track the establishment of a pan-African Continental Free Trade Area (CFTA). Against this backdrop, the eighteenth African Union Summit of Heads of State and Government, held in January 2012 in Addis Ababa, Ethiopia, focused on the theme: "Boosting Intra-African Trade". One of the landmark Decisions of the Summit was a comprehensive Action Plan for boosting intra-African trade in the short, medium and long-term and, more significantly, on the establishment of the CFTA by 2017 in accordance with the road map presented at the Summit. It was emphasized that 2017 was an indicative date.

22. To that end, Africa's political leaders agreed to undertake further reflections and sustain the momentum for establishment of the CFTA. The CFTA, if achieved, would be a major milestone and a stepping stone towards achieving the Continental Customs Union by 2019. Further, the creation of the CFTA would have a significant impact on boosting intra-African trade as it would create a market of about one billion people and would help to change once and for all the current dynamics, in which countries are simultaneously members of multiple RECs. Besides, it would compel the different RECs to move rapidly towards implementation of continental trade policy instruments in such areas as rules of origin, customs procedures, documentation and nomenclature, and border administration, as well as protocols governing movement of goods, persons, services and capital across Africa.

23. Furthermore, by fostering greater collaboration and cooperation between the RECs, the CFTA also has the potential to improve collective action to develop regional infrastructure and consolidate regional markets through improved interconnectivity in transport and communication, as well as to promote energy pooling to enhance competitiveness. Finally, the CFTA will help fast-track the realization of the vision set out in the Abuja Treaty, of an Africa-wide common market and, ultimately, the AEC. It is encouraging to note that a number of RECs such as COMESA, EAC, ECOWAS and SADC have embarked on the harmonization and simplification of customs procedures, documentation, nomenclature and rules of origin, and the establishment of one-stop border posts at key border crossings, such as the Chirundu border post between Zimbabwe and Zambia. They have also instituted regional motor vehicle insurance schemes, for example, the yellow and brown card schemes in operation in COMESA and ECOWAS, respectively. These are important achievements that can have a positive impact on progress towards the CFTA, bearing in mind that anchoring the CFTA on *acquis* within the RECs is one of its cardinal principles.

D. Free movement

24. This is one of the major pillars of integration and although there have been some notable achievements, progress remains mixed, and also slow, despite the existence of legal frameworks and programmes at the level of each REC. Some RECs are, however, taking concrete steps to facilitate the movement of people, through agreements on visa relaxation, single tourist visas, and regional passports (such as are in operation in EAC, ECOWAS and COMESA). RECs and member States that are falling behind on their commitments to implement protocols on the free movement of persons are expected to redouble their efforts to improve the situation, in order to facilitate freer and easier movement by the people of Africa across the continent. At the same time, progress towards guaranteeing the right of residence and establishment needs to be expedited in accordance with regional agreements and protocols. Concerning free movement of capital, some RECs have put legal texts in place to harmonize monetary and fiscal policies. For example, EAC, ECOWAS, COMESA, and SADC are working towards harmonizing business and financial laws. However, progress in service liberalization remains limited, with most RECs yet to embark on a comprehensive services liberalization agenda.

E. Infrastructure development

25. Deepening integration hinges largely on the continent's ability to get infrastructure and energy in place so as to reduce the cost of doing business and increase competitiveness. Improving infrastructure can significantly boost Africa's trade with itself as well as with the outside world. The length of paved roads as per cent of total roads in Africa is about five times less than that of high-income Organization of Economic Cooperation and Development (OECD) countries (nearly two-thirds of the OECD level in North Africa).

26. In the transport sector, the continent is characterized by fragmentation, inadequate capacity, and poor performance. Trading across regional borders is cumbersome, with multiple customs checks, differing technical standards, and informal checkpoints in some countries. Africa's road and rail network is sparse and many of its sea ports and airports are in need of refurbishment and expansion. At the administrative level, most African countries need to increase efficiency in customs administration, cargo handling, and logistics services. According to the World Bank's 2009 *Doing Business,* with few exceptions, most sub-Saharan African countries rank in the bottom 40 per cent of all countries in the trading across borders indicator.

27. The lack of adequate energy infrastructure has a direct impact on the lack of development of many African countries. Without adequate energy, Africa cannot effectively trade among its member countries, or develop sustainable industries, or generally improve the livelihoods of its population, particularly in rural areas. According to the Programme for Infrastructural Development in Africa (PIDA) framework, energy infrastructure is the one that most urgently needs attention and action. It is also the most costly to develop and refurbish. The current energy scene in Africa epitomizes contracts and contradictions. The continent, particularly sub-Saharan African, has the lowest access to electricity compared to other developing regions of the world. At the same time, the continent has abundant proven resources in oil, gas, coal and hydropower.

28. However, these resources are unevenly distributed across the continent and are mainly underexploited where they do exist. The success of Africa in improving energy access and building infrastructure therefore hinges on regional integration that will facilitate energy trade amongst African countries. It has been demonstrated that the underlying failure to provide and build infrastructure is the lack of capacity by Africa to mobilize adequate finance as well as private sector involvement in the energy sector, particularly the power sector. The recent *Africa Energy Outlook 2040* study (NEPAD, African Union and AfDB, 2011) concludes that an estimated \$43.6 billion per year will be needed to meet forecast energy demand for Africa to the year 2040, broken down as follows:

(a) Annual investment needs for the power sector are estimated at \$42.2 billion, with \$33.1 billion for generation, \$5.4 billion for interconnections and \$3.7 billion for distribution;

(b) Interconnection investment is urgent and needed upfront to meet forecast energy demand in 2020 for an average of \$5.4 billion per year;

(c) About \$3.7 billion per year to ensure that no country has an access rate lower than 60 per cent by 2040; and

(d) An estimated \$1.3 billion per year will be needed for gas and petroleum product pipelines.

Initiatives in addressing the infrastructure gaps

29. It is well documented that the importance of infrastructure is becoming better understood continent-wide. African leaders have agreed on several plans and initiatives, including the AU-NEPAD African Infrastructure Action Plan 2010–2015, the Infrastructure Project Preparation Facility and the Pan-African Infrastructure Development Fund, in order to close Africa's infrastructure gaps. AfDB is now spending more on infrastructure than on any other aspect of development, and there is increasing

regional cooperation on cross-border projects such as the Trans-Africa Highway and the West African Power Pool.

30. In 2011, AfDB approved about $8.5 billion as loans, representing a 36 per cent increase over about $6.2 billion in 2010. This was announced at the financial presentation of the Bank's results and operations for 2011 at its annual meeting in Arusha, United Republic of Tanzania. Infrastructure, the largest area of operations, accounted for 38 per cent of the loans and grants, followed by multi-sector loans and grants which came to less than 21 per cent of the total. The multi-sector category covers public sector management, including good governance and anti-corruption programmes, industrial import facilitation and export promotion.

IV. OVERCOMING KEY OUTSTANDING CHALLENGES

31. Implementation of regional integration is hampered by numerous well-known challenges. At the centre of these challenges is the will and commitment by all stakeholders, in particular member States of RECs and of AU to fully fund and implement agreed treaties and protocols, with the support of development partners, first and foremost at national level, then at subregional and continental levels. Intensified efforts on these fronts can help make a decisive difference in enhancing the integration agenda.

A. Effectively and consistently mainstreaming regional integration into national development plans and budgetary allocations

33. One of the main challenges underpinning the acceleration of Africa's continental integration is the limited progress in mainstreaming regional integration agreements and the several decisions adopted at both continental and regional levels into national development plans and strategies. Until today, implementation of these decisions at national level remains limited and a number of countries are yet to fully integrate the agreed decisions into their national development strategies. A number of underlying factors attributed to limited implementation of decisions include lack of the financial resources and human resources to cope with and implement the diverse range of regional integration initiatives and programmes. Overlapping membership has also put a strain on member States' resources and ability to implement multiple and competing programmes.

34. Dissemination of information, such as decisions relating to regional integration issues, has also been identified as one of the challenges hindering the acceleration of the regional integration agenda. There is limited consultation at national level on decisions and protocols adopted at the continental and regional levels. This calls for an increase in information-sharing among all key stakeholders. Overcoming these challenges would help to enhance the efficiency and effectiveness of regional integration institutions.

35. There is no doubt that effective implementation of regional integration will need a collective and comprehensive programmatic approach by all the stakeholders involved. This should involve: a clear understanding of regional integration at national levels (the socio- economic benefits of regional integration), by all the stakeholders involved; the link between regional integration and national development, particularly how it links to growth sectors of countries; how the implementation of the activities are linked to the financial resources of the countries; and what implications this has on the national budget, among other areas.

36. In recognition of this problem, UNECA undertook a detailed research on the subject of mainstreaming regional integration at the national level. Among other objectives, the study was aimed at addressing the following: status of mainstreaming regional integration agreements and decisions into national development plans, strategies and budgetary allocations; key challenges in mainstreaming regional integration strategies at national level, including capacity gaps and how these could be improved; and policy guidelines on how member States should enhance their institutional capacity-building in the area of regional integration.

B. Finding a lasting solution to the issue of adequate funding of Africa's integration

37. The predictable and sustainable funding of the diverse activities and programmes of Africa's integration remains an overwhelming challenge. Key Institutional building blocs such as the AUC and the RECs rely heavily on external resources to finance the bulk of their programmes, as assessed contributions by member States are extremely limited and often in arrears, resulting in delayed or stalled implementation. Meanwhile, creative alternatives such as the self-financing mechanisms in ECOWAS, UEMOA, and CEMAC, and the COMESA Fund, are helping in no small measure to help mitigate the financial gaps.

38. Nonetheless, the fact remains that there are key contemporary programmes and initiatives such as the MIP, PIDA, the Action Plan for Boosting Intra-African Trade, the Action Plans on Industrialization in Africa, and the establishment of the CFTA that need to be seriously financed. On-going initiatives such as the proposed "Integration Fund", and the establishment of the three continental financial institutions, namely the African Investment Bank, the African Monetary Fund and the African Central Bank, are yet to fully materialize. The stakes are therefore extremely high, at the very least, to conclude the long-standing quest for alternative sources of funding for Africa's integration agenda through the "Integration Fund" initiative.

V. CONCLUSIONS AND RECOMMENDATIONS

39. The analysis in this paper clearly indicates that much effort has been made by the RECs and their member States, as well by the pan-African institutions to help accelerate the regional integration agenda. The on-going initiatives of the Tripartite FTA are some of the notable efforts in this respect. However, more needs to be done in order to obtain greater results. Given the current progress in the enhancement of regional integration in Africa, and the challenges facing the process, there is still need to enhance the collaborative efforts by the pan-African institutions in the implementation of activities and programmes leading to attainment of the integration agenda. Some of the decisions to be undertaken by the RECs, AUC, and the member States include:

(a) Establishment of well-functioning regional institutions and more investment in infrastructure. Improved national and cross-border transportation, power, water, and communications systems are needed for people to bring their goods and services to the markets where they can get the best returns, and for workers to avail themselves of opportunities;

(b) Member States to give due consideration to the various challenges hampering regional integration in Africa, including mobilizing the required financial resources for regional integration;

(c) Member States to support the on-going initiatives such as the MIP, PIDA, the proposed CFTA, and the Action Plan for boosting intra-African trade;

(d) Member States should accelerate the implementation of decisions, treaties and protocols as well as give a strong commitment to the harmonization of programmes and activities of the RECs;

(e) Pan-African initiations should strengthen the monitoring and assessment process in terms of tracking the progress made towards achieving the integration objectives, and to evaluate the results of programmes and projects directed towards those objectives.

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