

Rockefeller Foundation

Horizon Scanning and Trend Monitoring Report

Greater Horn of East Africa – January 2010

INTRODUCTION

Geographic Scope: Greater Horn of Eastern Africa (GHEA) including Tanzania, Kenya, Uganda, Rwanda, Burundi, eastern Democratic Republic of Congo (DRC), Somalia/Somaliland/Puntland, Ethiopia, Sudan, Eritrea, and Djibouti.

Topics: Poverty and equity; migration and urbanisation; resource-based conflict; information & communications technology and state-citizen relations; regional integration

Rationale for these topics: GHEA is the location of some of the world's greatest challenges: deep and seemingly entrenched poverty and inequality, political instability and conflict which generates refugees and internally displaced persons (IDPs); frequent droughts which trigger additional migrations. The region also shows signs of dynamism (innovation in cell-phone based financial services), resilience (Somalia's thriving 'non-states' of Puntland and Somaliland) and a tremendous capacity for deliberate social regeneration and renewal (Rwanda).

Framework: The five topics can be organised into a framework comprising of the core human welfare challenge of poverty and inequity. Responses to this core challenge include migration and urbanisation and contest for natural resources as individuals and communities seek better prospects and opportunities. The adoption and adaptation of new technology (especially ICT) offers new scope for both income generation and its redistribution. Technology also facilitates new forms of self-organisation and affiliation unmediated by government. Regional integration is a large inter-governmental response to the poverty challenge, and it is instructive to explore whether and how governments are leading or lagging their citizens' integrationist instinct and activities.

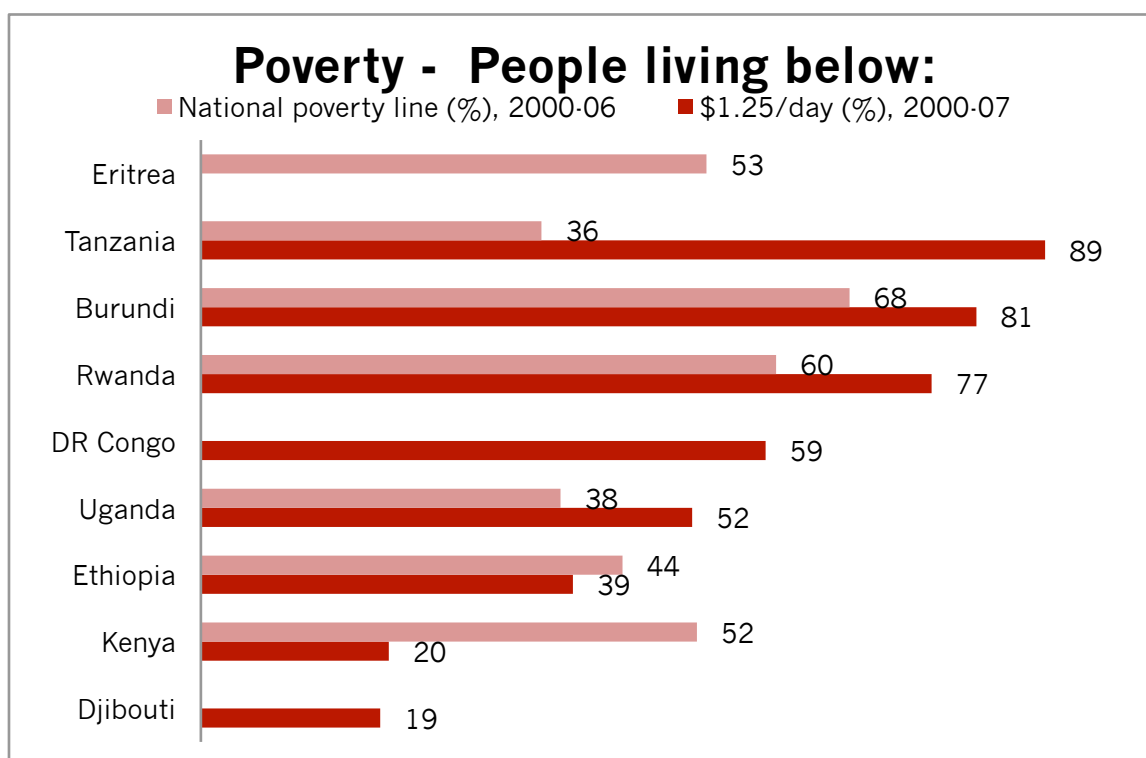
January 2010 report: This first report focuses on establishing a baseline of the most recent data on the three topics of poverty and inequality, migration and urbanisation (with a focus on conflict-induced movements) and information and communications technology (ICT). It then searches for clues about Tanzania's attitude towards regional integration through an analysis of the country's English-language newspaper headlines.

THEME: POVERTY AND INEQUALITY

Issue: The Greater Horn of East Africa (GHEA) is one of the poorest regions in the world. The UNDP's Human Development Report 2009 ranks five of the region's 11 countries that have human development index (HDI) rankings below 159 (Burundi, D R Congo, Ethiopia, Eritrea and Rwanda) in the low human development category. With over 163 million people, these countries represented over 51% of the region's total population in 2007 of approximately 323 million. The other 49% live in countries whose record of tackling poverty is checkered at best (Kenya is ranked the highest at 147). Even as economies grow, the equitable distribution of the benefits seems elusive, leading to a widening of the gap between rich and poor. Unchecked, this builds serious negative pressures on social cohesion. Given that poverty eradication and equity are high-ranking goals for the state authorities in the region, it is important to analyse the most recent data to establish a baseline for this theme.

Analysis: Baseline data on poverty and inequality¹

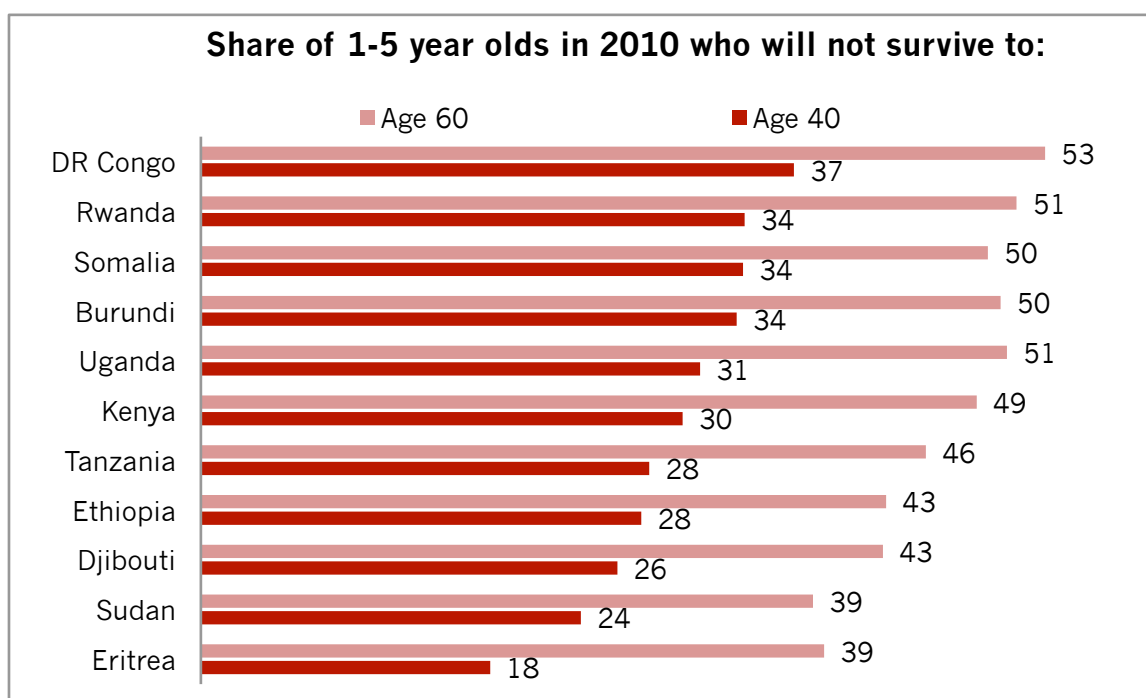
Poverty



Tanzania had the largest proportion of its people (89%), living below the \$1.25/day international poverty line compared to Kenya (20%) and Djibouti (19%). However, and interestingly, using the nationally defined poverty lines, Tanzania's performance improved hugely (to 36%), while Kenya's moves significantly in the other direction (to 52%).

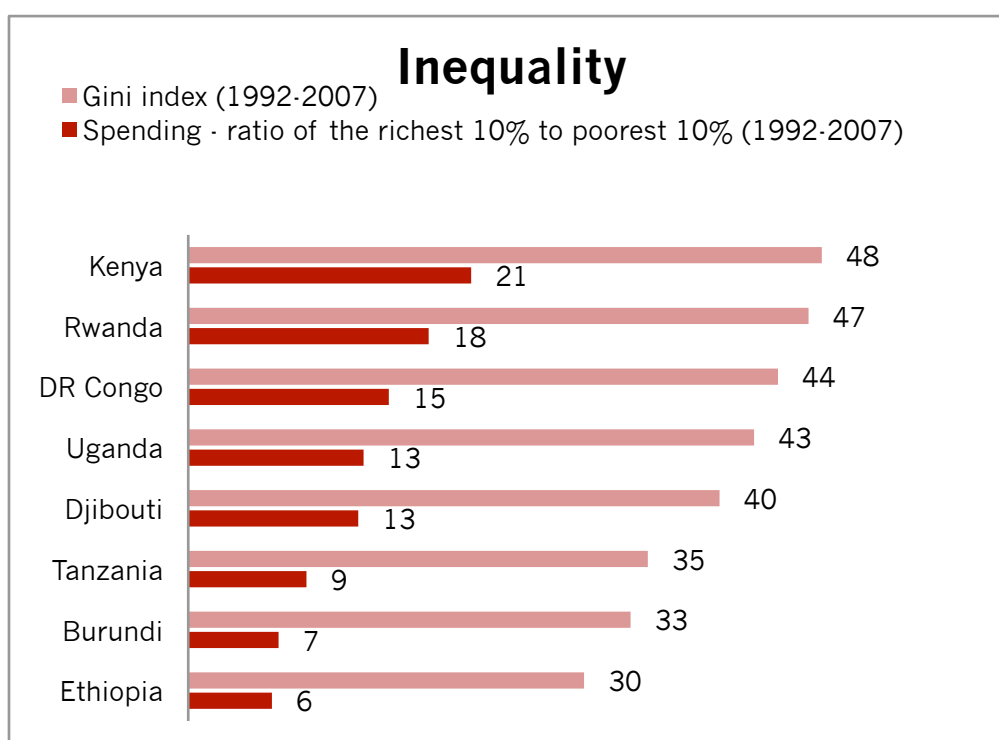
¹ All data from the United Nations Human Development Report 2009 available at <http://hdr.undp.org/en/statistics/>

Life Expectancy



Life is likely to be short for a large number of the children born in the region between 2005 and 2010. In DR Congo, 37% of them will not live beyond 40 years of age, compared to 18% in Eritrea.² More than half will not live past the age of 50 in five of the region's 11 countries.

Inequality



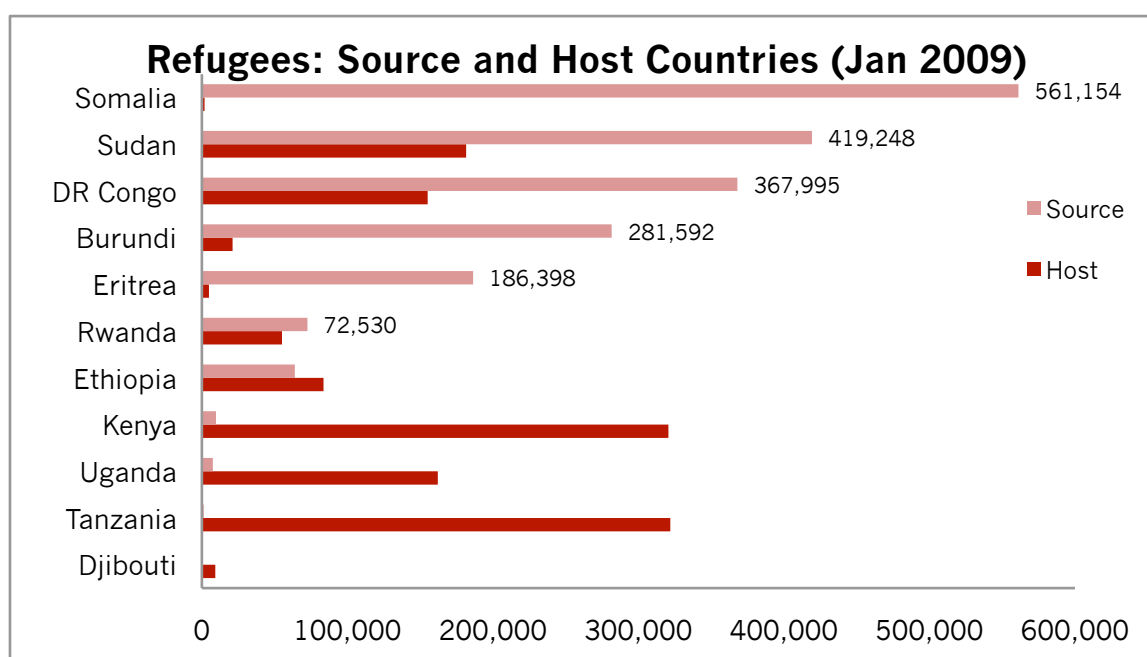
² The probability is just 1.6% in Singapore and 1.9% in Israel

The Gini coefficient and ratio of rich to poor spending tell the same story. Kenya is the most unequal country in the region (Gini of 48) where the richest 10% spend 21 times more than the poorest 10%. Ethiopia is the most equal (Gini of 30) and the richest spend just six times more than the poorest.

THEME: MIGRATION AND URBANISATION

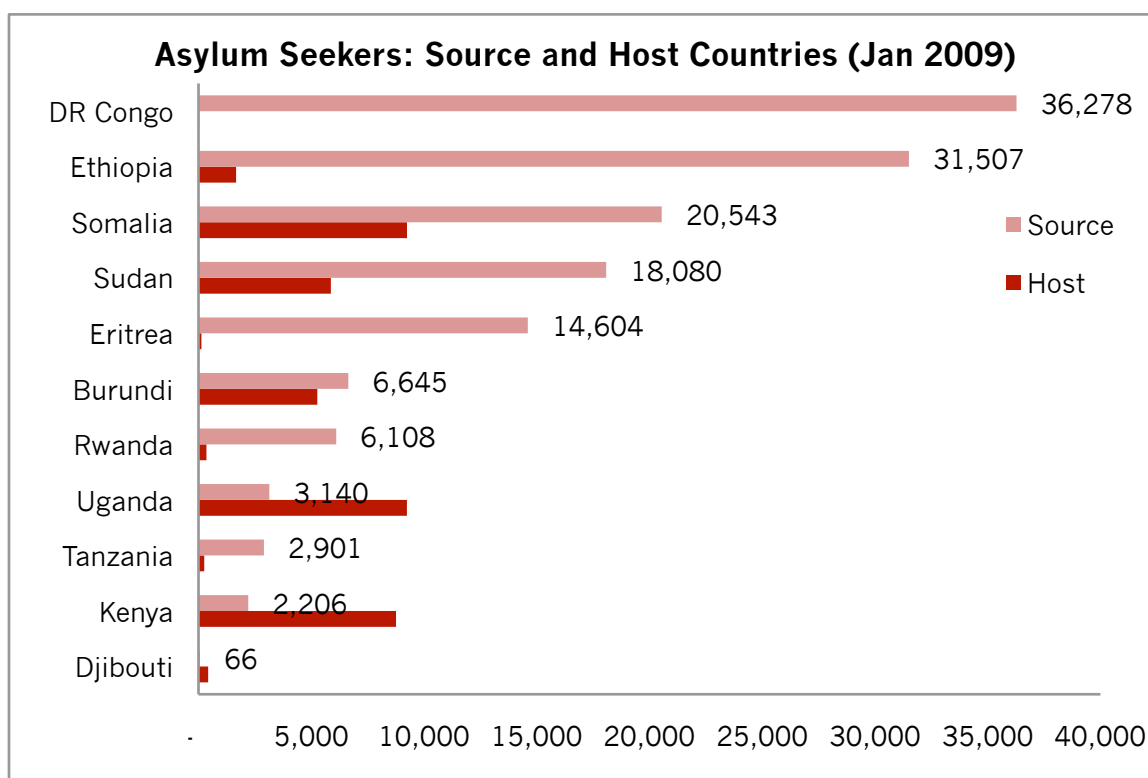
Issue: The Greater Horn of East Africa (GHEA) has experienced decades of mostly internal conflict (Somalia, Sudan, Rwanda, Uganda, Burundi, DR Congo) and some cross border wars (Ethiopia/Eritrea and the multi-country war in DR Congo). In addition to the loss of life, many refugees, asylum-seekers and internally displaced populations have been the result. It is important to understand the magnitude and implications of such conflict and insecurity induced human mobility.

Analysis: A snapshot of conflict and insecurity-induced movement³

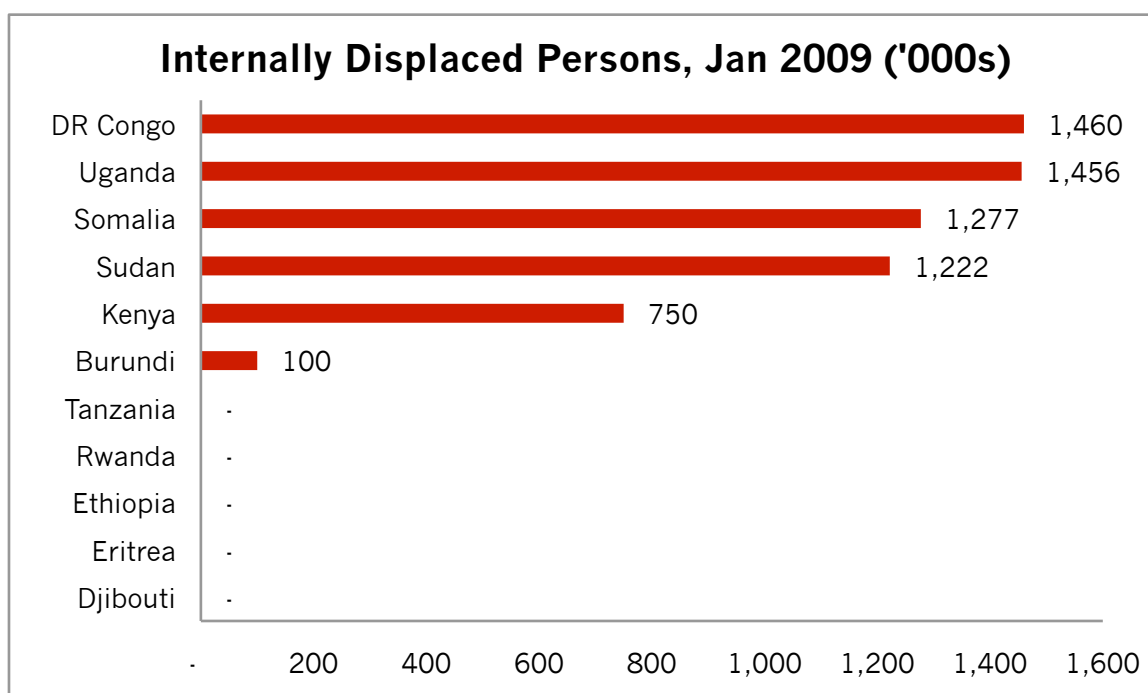


As at January 2009, GHEA countries had created 1.97 million refugees of whom 1.31 million lived inside the region and 655,000 outside the region. Almost 92% of the refugees came from five countries (Somalia, Sudan, DR Congo, Burundi and Eritrea). 87% were hosted in the five countries of Tanzania, Kenya, Sudan, Uganda and DR Congo).

³ All data from the United Nations High Commission for Refugees (UNHCR)

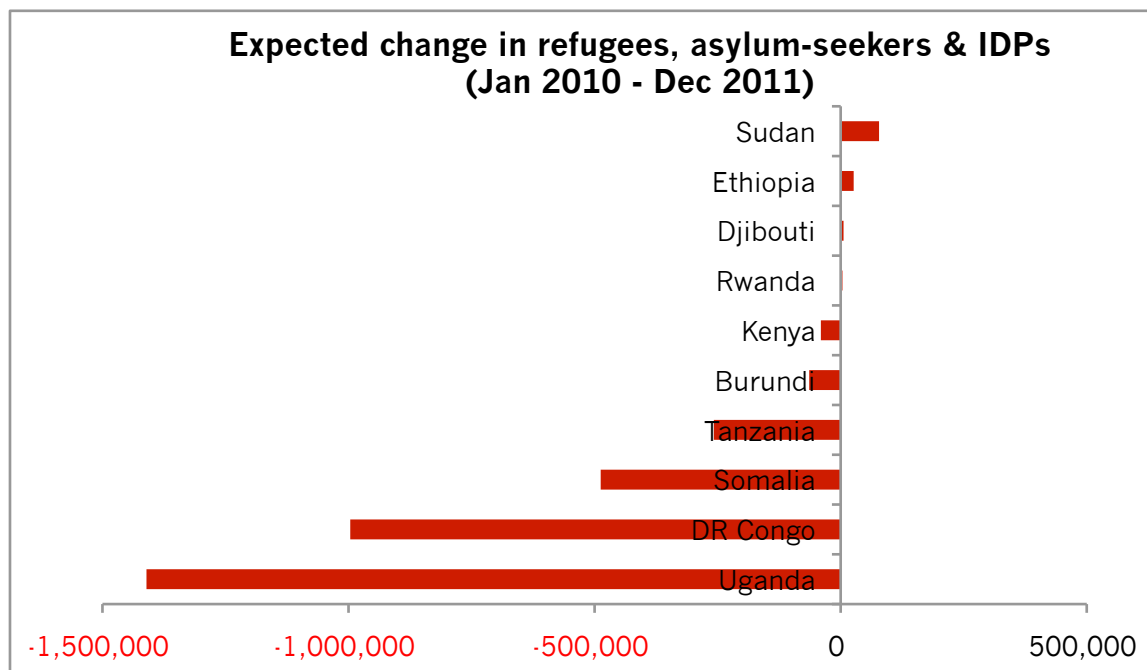


GHEA created 142,000 asylum seekers (85% from DR Congo, Ethiopia, Sudan, Somalia and Eritrea), hosted 41,229 within its territory (93% in Somalia, Uganda, Kenya, Sudan and Burundi) and 100,849 were outside the region. Interestingly, Sudan and Somalia are both generating and hosting asylum-seekers. Is there a 'population swap' happening?



GHEA had 6.26 million internally displaced persons (IDPs) in six countries.

UNHCR's prognosis: UNHCR forward planning data (to December 2011) foresees a 29% reduction in the population of refugees, asylum-seekers and IDPs from 10.75 million in January 2010 to 7.6 million by December 2011.



The forward data provides an insight into the UNHCR's expectations and assumptions about the evolution of the region's security situation.

Country	Expected status by December 2011
Uganda	All 1.4 million IDPS will have returned home
DR Congo	Almost 1.0 million refugees and IDPS will have returned home
Somalia	A reduction of over 500,000 IDPs, although 15,000 new refugees and asylum-seekers will have been created
Tanzania	Over 211,000 refugees from Burundi and almost 50,000 refugees from DR Congo will have returned to their countries. A few will have been naturalised as Tanzanians
Burundi	Refugees from DR Congo will have returned and all returning refugees resettled within the Burundi
Kenya	There would be a 16% reduction in IDPs, but this will be more than offset by increase in Somali and Ethiopian refugees of over 100,000
Rwanda	Expecting 5,000 more refugees from DR Congo and 500 fewer from Burundi
Sudan	Expecting 100,000 new IDPs and 32,000 new Eritrean refugees, but 5,000 fewer from DR Congo
Ethiopia	Expecting 30,000 more Somali and Eritrean refugees, but more than 4,000 fewer Sudanese refugees
Djibouti	Expecting 6,200 new refugees from Ethiopia, Somalia and Eritrea

Almost the entire reduction in displaced populations is craven by a decline in IDPs. UNHCR seems to be banking on Burundi, DR Congo and Uganda becoming safer, especially for its citizens (IDPs). However major numbers of IDPs are expected to remain in Sudan (4.2 million), Somalia (1.0 million), DR Congo (over 545,000) and

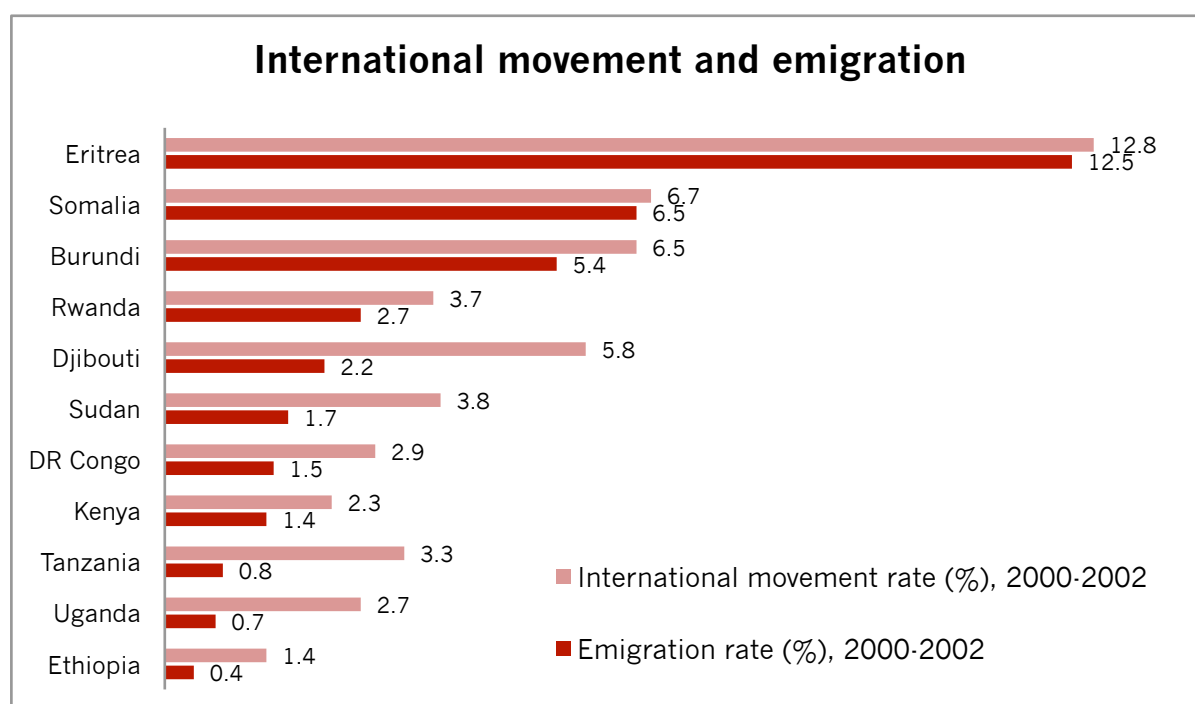
Kenya (over 300,000). If the Great Lakes countries are expected to become safer, instability and insecurity seems to be the expected fate of the Horn countries of Somalia, Sudan, Ethiopia and Eritrea.

On the horizon: Will the Great Lakes region really stabilise and become more secure in the coming two years? Presidential and parliamentary elections are expected in Sudan (April), Burundi (June and July), Rwanda (August), Somaliland (September) and Tanzania (October). Burundi's elections have been described as very critical for the future stability of the country.⁴ As for the Horn, serious concern has already been raised about the health of the Sudanese peace agreement ahead of its own elections and the referendum in South Sudan due in 2011.⁵

Human Development Report 2009 - Overcoming barriers: Human mobility and development⁶

By way of widening the migration perspective, data from the HDR 2009 allows an exploration of three interesting questions. How much international movement and emigration is happening in the region? Who are the international emigrants? Where are the migrants going?

How much movement?



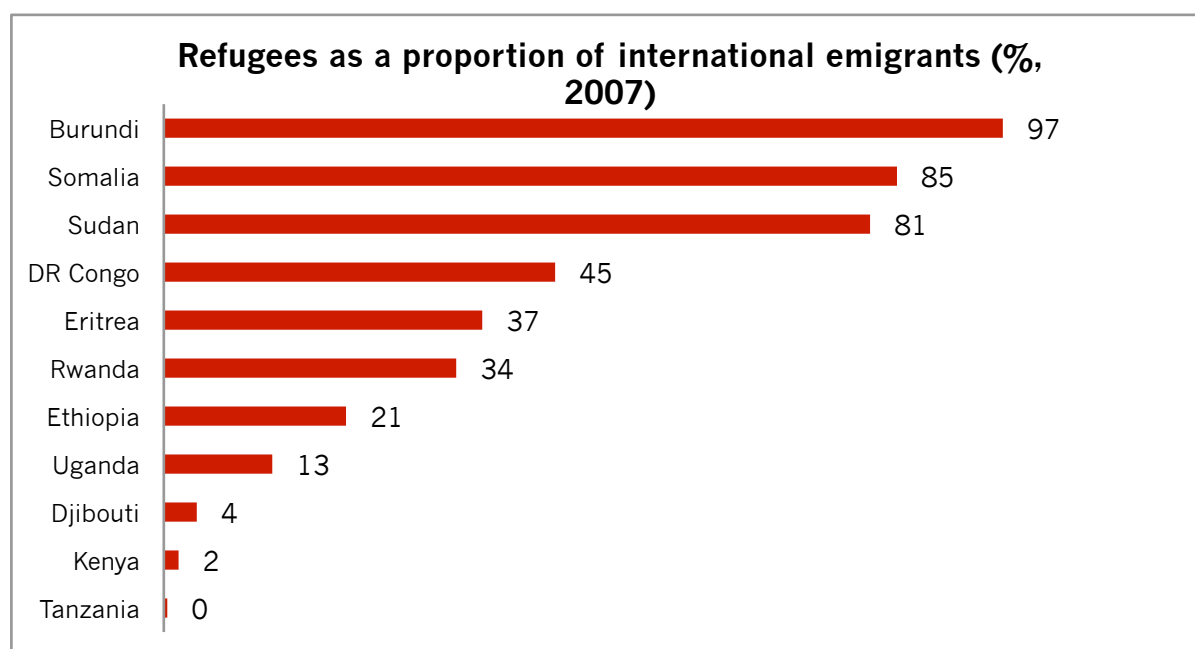
With the smallest difference between the rate of international movement and emigration (as a proportion of the population), Eritreans seem more prone to emigration. By contrast, citizens of Djibouti, Sudan, Tanzania and Uganda seem more likely to return home from their travels (the gap between movement and emigration is the largest for these countries).

⁴ Ambassador Juma Mwapachu, EAC Secretary-General (interview)

⁵ <http://www.theirc.org/news/aid-agencies-warn-sudan-peace-process-may-stall-without-greater-international-attention-4182> accessed January 8, 2009

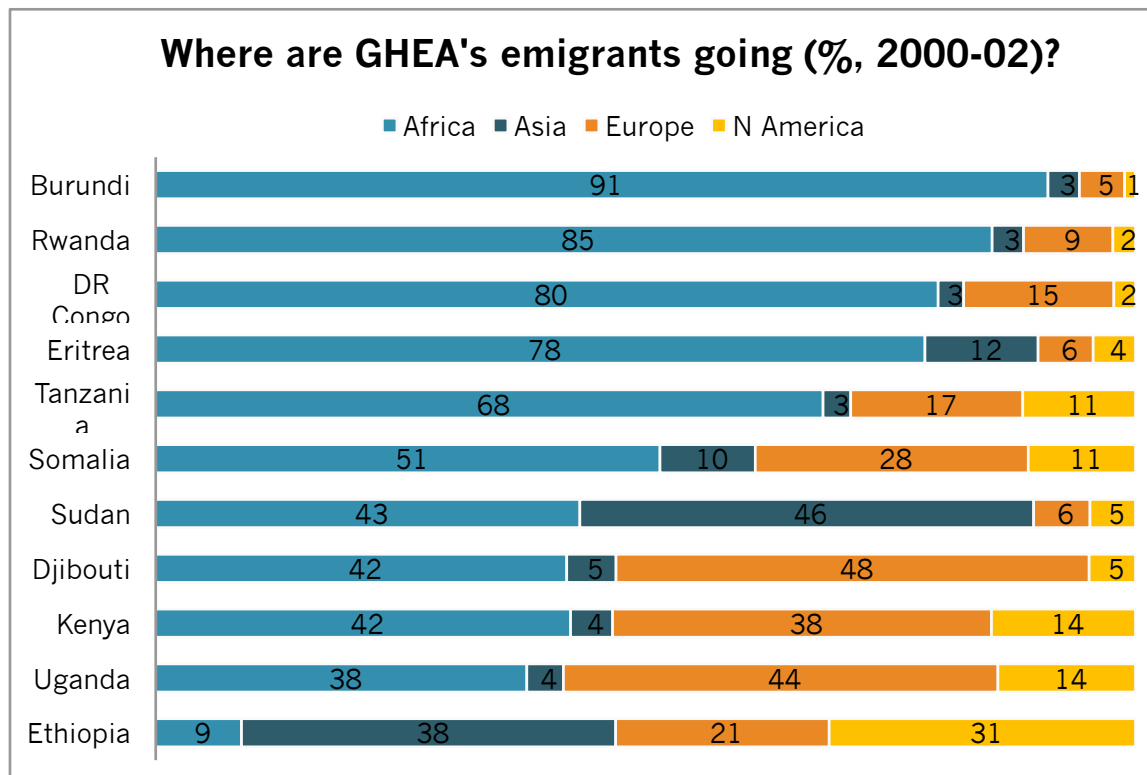
⁶ Source: <http://hdr.undp.org/en/>

Who is emigrating?



Refugees make up a large proportion of international migrants for some countries (over 50% for Burundi, Somalia and Sudan), but not others (Djibouti, Kenya and Tanzania).

Where are they going?



Africa is the destination for migrants from most countries except Ethiopians who prefer Asia, N America and Europe. A significant share of migrants from Somalia,

Djibouti, Kenya and Uganda also go to Europe. Asia is a popular destination for the Sudanese.

THEME: ICTS AND THE STATE-CITIZEN RELATIONSHIP

Issue: In a January 3, 2010 op-ed guest column in the New York Times, Bono wrote about the top 10 ideas that might make the next 10 years more interesting, healthy or civil. In number seven was 'people power and the upside down pyramid' in which he notes the following:

Much has been written about the profits to be made at the bottom of the pyramid; less has been said about the political power there. Increasingly the masses are sitting at the top, their weight, via cell phones, the web and civil society and democracy these technologies can promote, is being felt by those who have traditionally held power. Today, the weight bears down harder when the few are corrupt of fail to deliver on the promises that earned them authority in the first place⁷.

Interestingly, Bono's sentiment is echoed by an academic in his predictions for 2010. He argues that 'people power in development will move into a new age [mediated and enabled by ICTs]. ' He notes the following:

In most African countries the number of Internet users has tripled or quadrupled in the past five years. In 2004, two in ten households in the developing world had a mobile phone subscription while today it is five in ten. These trends will accelerate and we will find ever more uses for them in development. I already see many applications: UNICEF in Malawi using mobile phones to monitor infant nutrition status in real time, international NGOs using mobiles to monitor potential famines, the use of YouTube to connect organisations' field and headquarter operations to promote the sharing of front line innovations, and the use of mobile video to monitor rights abuses. Will this new technology foster a profound new wave of participation in development and change? I think so⁸.

This theme will explore how the growing penetration of ICTS in the region may (re)shape the relationship between citizens and their governments, and how it might affect the level of citizen agency by facilitating self-organisation and non-traditional affiliations.

We begin by understanding the data on the status of telecommunications in the Greater Horn of East Africa (GHEA). Data was not available for Djibouti, Somali and Sudan. These countries represent 50 million people (estimates for 2007).

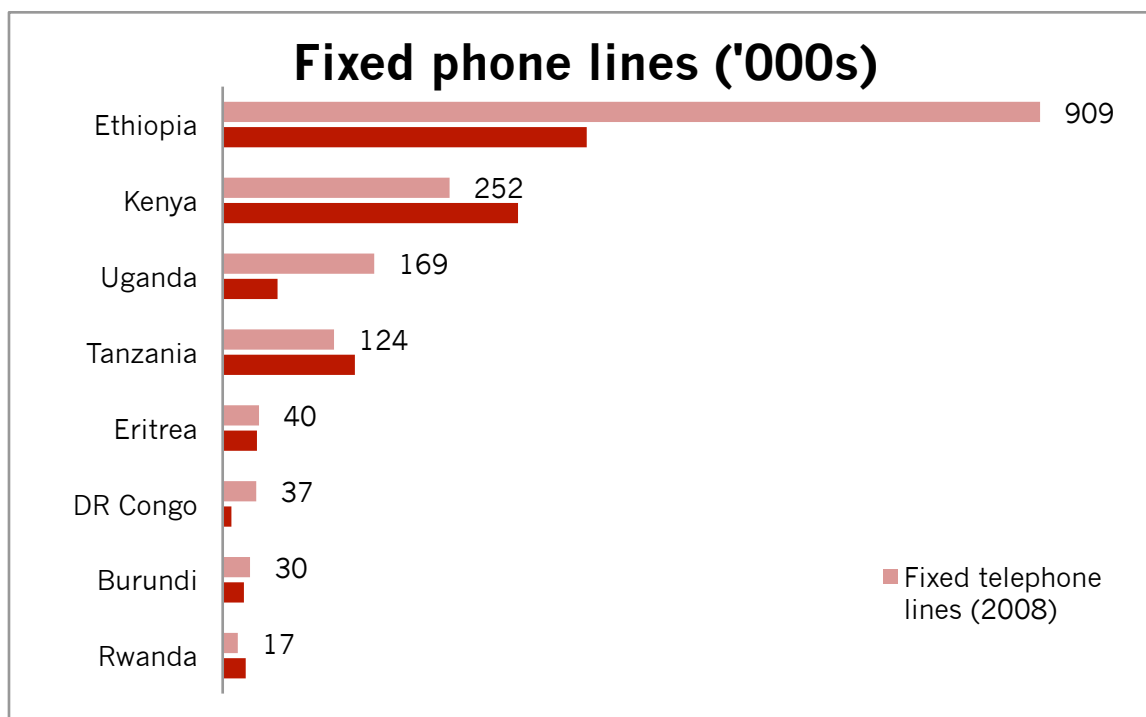
⁷ New York Times (January 3, 2010) 'Ten for the Next Ten' by Bono

⁸ Laurence Haddad, Director, Institute of Development Studies, Sussex

<http://www.ids.ac.uk/go/news/ten-predictions-for-2010> accessed January 15, 2010

Analysis: Baseline data on ICT in the GHEA⁹

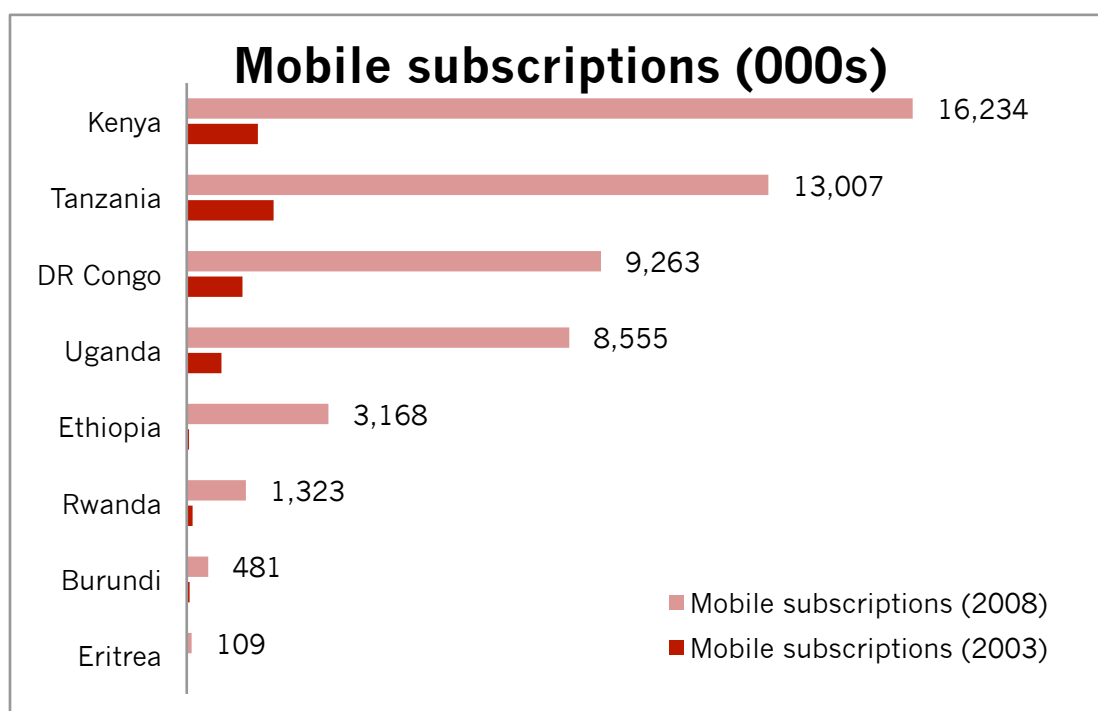
Fixed telephone lines



The total number of fixed lines in the region increased from just over 1.0 million in 2003 to almost 1.6 million in 2008. Ethiopia, which saw a more than doubling of fixed lines, accounted for 57% of the fixed lines in the region in 2008. While it increased elsewhere, the number of fixed lines declined in Kenya, Tanzania and Rwanda. GHEA's share of Africa's fixed lines increased from 11% in 2003 to 15% in 2008.

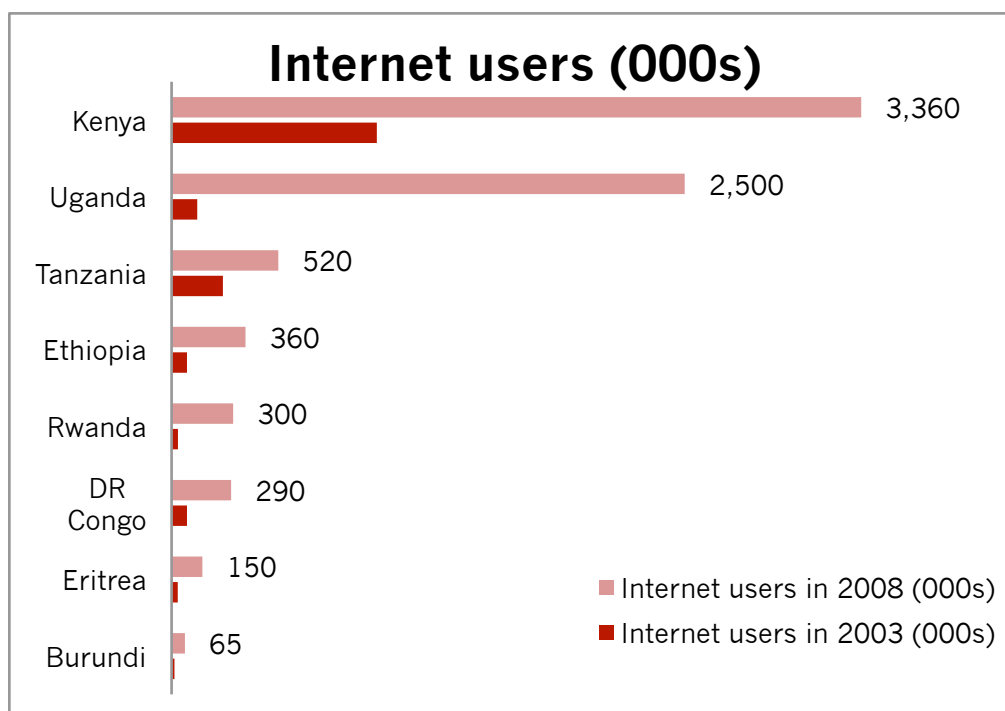
⁹ All data from the ITU World Telecommunications/ICT Indicators Database available at http://www.itu.int/dms_pub/itu-d/opb/ind/D-IND-RPM.AF-2009-PDF-E.pdf

Mobile subscriptions



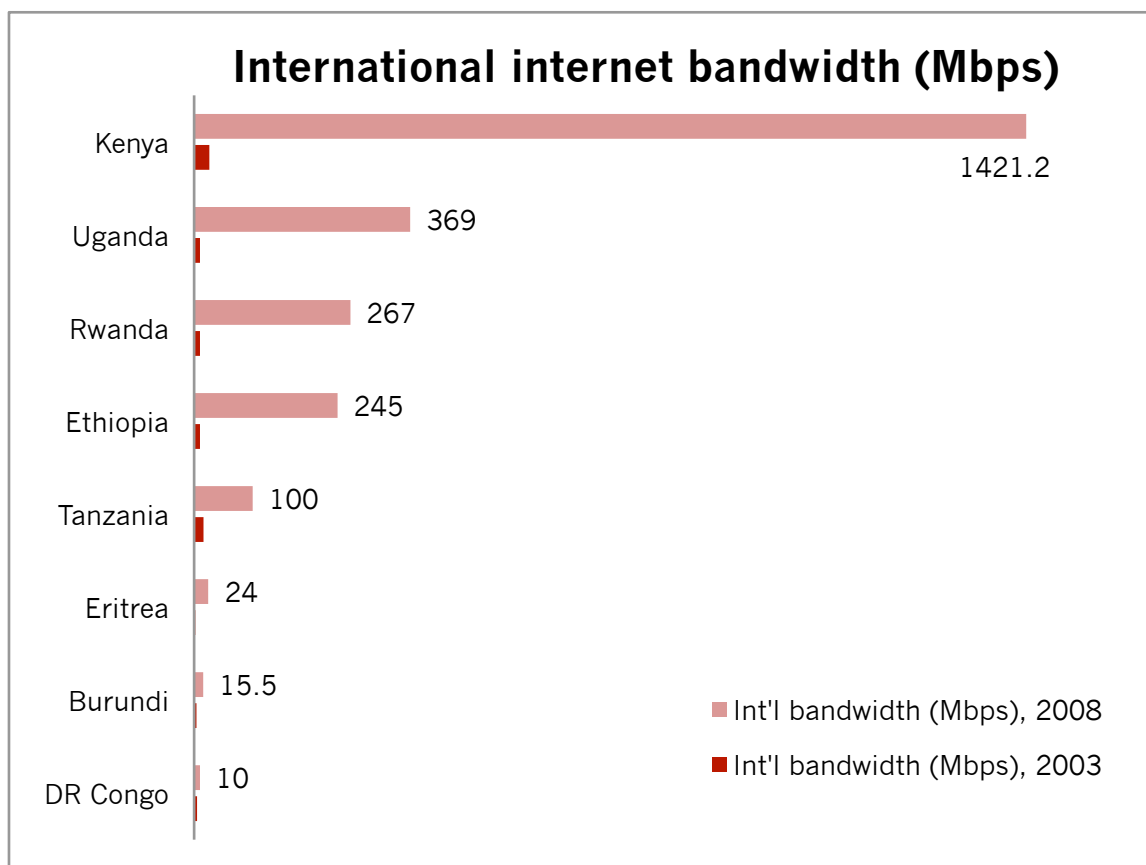
GHEA's mobile subscriptions increased ten-fold from 5.8 million to 52 million between 2003 and 2008, and increased their share of Africa's market from 16.5% to 21%. Kenya accounts for 31% of the region's mobile subscribers, followed by Tanzania (25%), DR Congo (18%) and Uganda (16 %). Kenya and Tanzania account for 7% and 5% of Africa's total mobile subscriptions in 2008.

Internet Users



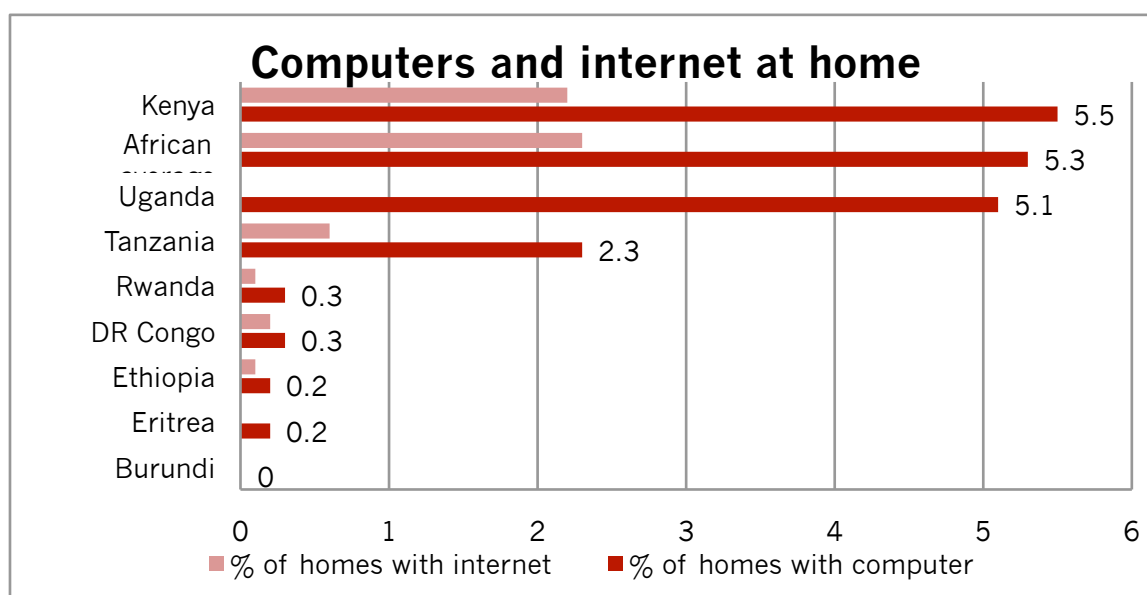
The number of Internet users increased from 1.6 million to 7.5 million between 2003 and 2008. GHEA's share of Africa's Internet users increased from 19% to 24%. Kenya and Uganda combined make up 77% of the region's Internet users.

International Internet bandwidth



The Internet data pipe has also increased in size from 83 Mbps to 2,451 Mbps and given the GHEA region a major boost of Africa's share of bandwidth from 5% to 19% between 2003 and 2008. Kenya accounted for 58% of the region's bandwidth followed by Uganda (15%), Rwanda and Ethiopia (10% each). The landing on the East African coast of the fibre optic cable in July 2009 will undoubtedly change these data.

Computers and Internet access at home



The penetration of computers in the home in GHEA is very low. Only Kenya, with a 5.5% penetration slightly exceeds the African average of 5.3%, and Uganda's rate is slightly lower at 5.1%. The penetration of Internet access is even lower across the board. Kenya manages a 2.2% rate which is still significantly higher than that achieved by the other countries.

Summary: These data reveal three major insights, namely (a) the growth in connectivity across the region through fixed lines, mobile phones and the internet, (b) an increase in GHEA's share of the African market over the past 5 years, and (c) Kenya's clear leadership position in ICT infrastructure in the region. Future reports will ask how ordinary citizens are using this ICT infrastructure to shape their lives in new and interesting ways.

THEME: REGIONAL INTEGRATION

Issue summary: The 10th anniversary of the revival of the East Africa Community was celebrated in November 2009. During the decade, Tanzania developed a reputation of being cautious to a fault with the process and pace of East African regional integration. Given that the media is at once society's mirror as well as an important shaper of public opinion, we wanted to use an analysis of newspaper headlines to explore whether Tanzania's perceived reluctance could be gleaned from what its newspapers published on regional integration.

A total of 770 headlines on EA issues from seven English language newspapers (five dailies and two weeklies) were analysed. The Government of Tanzania (1), private Tanzanian media houses (4) and a regional media house (2) own these newspapers.

Analysis

In terms of article distribution, the three private local dailies published (401) articles, compared to 166 by the foreign-owned daily (Citizen) and 107 by the government

paper (Daily News). Most articles reported on the actions of EAC official organs and affiliates (Summit, Secretariat, Legislative Assembly, Business Council). Others were analytical pieces on elements of the integration process (common market, customs union or joint projects).

The Citizen focused on the regional trading bloc. Tanzania's private press exhibited mixed feelings between being positive and cautious. The launch of the submarine fibre-optic cable in the region attracted significant attention; conflict's hot topic was land while poverty and equity hot topic was food security.

Editorials:

The 62 editorials focused overwhelmingly on the process, and mechanics of regional integration. Very few commented on the implications of integration on conflict (7) and poverty/equity (1). There was no commentary on migration or technology despite the coverage given to the submarine fibre optic cable in mid-2009. The government's newspaper urged care with the integration process.

The Afrobarometer briefing paper 54 found out that Tanzanians are more supportive of the economic integration than is commonly assumed, and plurality thinks that it will improve the country's economic prospects through availability of jobs, market and trading opportunities. Tanzanians are however, more considerably wary of greater political federation. The study credited this to lower understanding and awareness levels and perhaps wary of federation spilling over conflicts from the neighbouring countries to Tanzania.