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**Economic Commission for Africa**  
**Committee of Experts of the Conference of African**  
**Ministers of Finance, Planning and Economic Development**  
Forty-second meeting  
Victoria Falls, Zimbabwe (hybrid), 28 February–1 March 2024

Item 6 of the provisional agenda\*  
**Statutory issues**

## **Report on the implementation of the Vienna Programme of Action for Landlocked Developing Countries for the Decade 2014–2024**

### **I. Introduction**

1. Adopted in 2004, the Vienna Programme of Action for Landlocked Developing Countries for the Decade 2014–2024 is coming to an end. This is, therefore, an opportune moment to review progress made in implementing the Programme. Despite commendable efforts deployed during the past decade, landlocked developing countries still face significant challenges that continue to hinder their socioeconomic development. Furthermore, of the 16 landlocked developing countries in Africa,<sup>1</sup> 13 are still categorized as least developed countries,<sup>2</sup> and no landlocked developing country in Africa has graduated from least developed country status in the past decade.

2. Numerous global challenges, including economic crises, political conflicts and a global pandemic, have marked the decade 2014–2024. Significant events that have occurred during that period include the coronavirus disease (COVID-19) pandemic and the ongoing crises in Ukraine and Gaza. Those events have had significant negative repercussions for Africa, curbing economic growth, stoking inflation, reducing foreign investment, increasing debt vulnerabilities and food insecurity, and, more broadly, curtailing progress made by landlocked developing countries, transit countries and other stakeholders in the context of the Vienna Programme of Action.

3. In addition to global challenges, political instability and violent extremism have placed additional strains on African economies, further impeding implementation by African landlocked developing countries of the 2030 Agenda for Sustainable Development and Agenda 2063: The Africa We Want, of the African Union.

4. In the present report, an overview is provided of implementation of the Vienna Programme of Action in Africa over the past decade. In the first part of the report, a summary is provided of socioeconomic development in landlocked developing

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\* E/ECA/COE/42/1.

<sup>1</sup> Botswana, Burkina Faso, Burundi, Central African Republic, Chad, Eswatini, Ethiopia, Lesotho, Malawi, Mali, Niger, Rwanda, South Sudan, Uganda, Zambia and Zimbabwe.

<sup>2</sup> Burkina Faso, Burundi, Central African Republic, Chad, Ethiopia, Lesotho, Malawi, Mali, Niger, Rwanda, South Sudan, Uganda and Zambia.

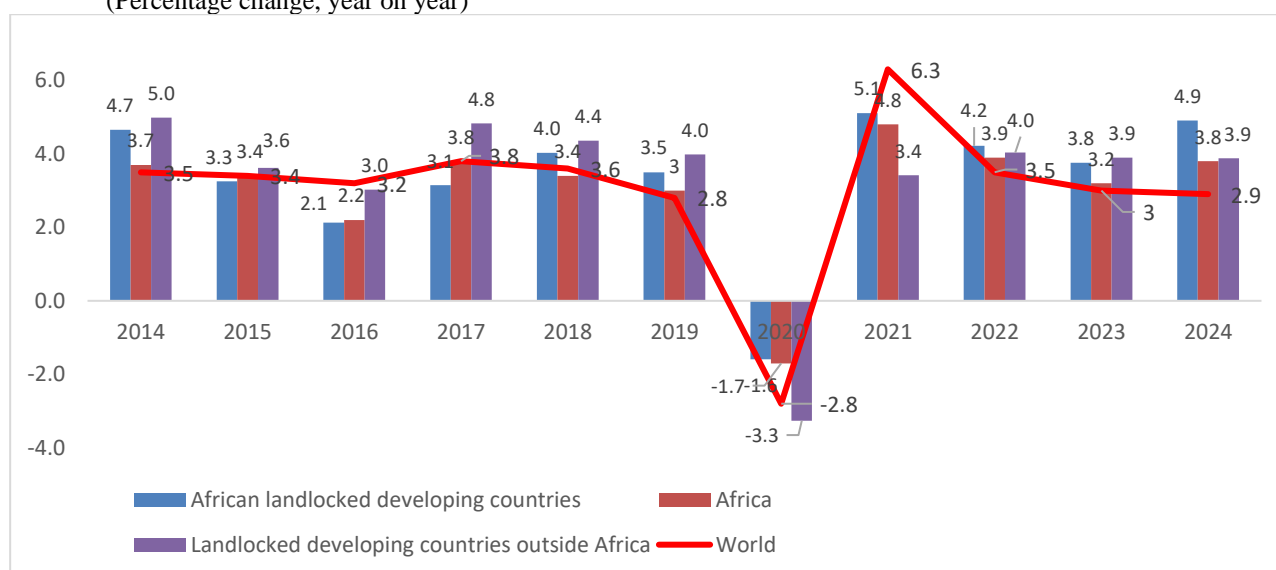


countries in Africa. A more detailed overview is then provided of progress achieved in connection with the six priorities for action prescribed in the Vienna Programme of Action. Lastly, a number of conclusions are drawn, and relevant stakeholders are urged to adopt a successor framework to the Vienna Programme of Action that will embody a renewed commitment to address the pressing needs of landlocked developing countries, in line with the recommendations made in the outcome document of the High-level Africa Regional Review Meeting in Preparation for the Third United Nations Conference on Landlocked Developing Countries, held in Gaborone in May 2023.

## II. Overview of socioeconomic development in African landlocked developing countries

5. Between 2014 and 2019, immediately prior to the COVID-19 pandemic, African landlocked developing countries recorded lower real gross domestic product (GDP) growth than landlocked developing countries in other global regions. As illustrated in figure I, however, African landlocked developing countries registered a relatively mild contraction in GDP in 2020 (-1.6 per cent), at the start of the COVID-19 pandemic, compared with the global average (-2.8 per cent), and have recovered since then at a faster pace than other global regions, Africa as a whole and landlocked developing countries outside Africa.

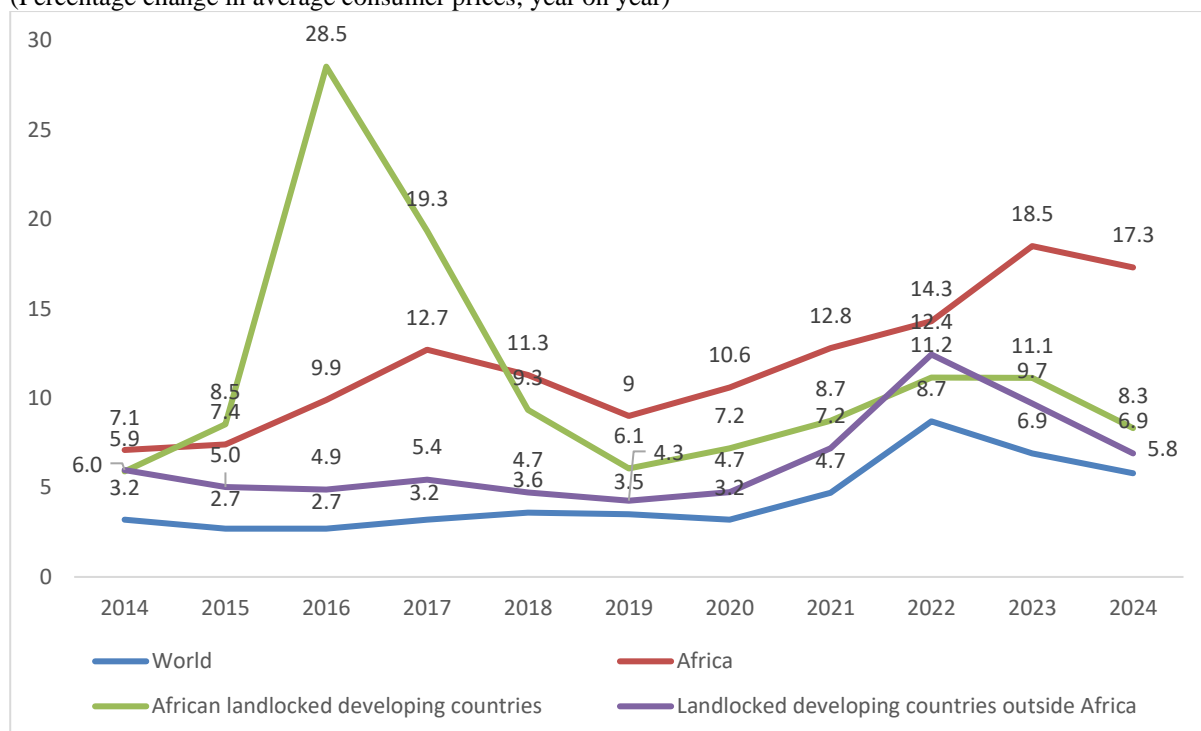
Figure I  
Real gross domestic product, 2014–2024  
(Percentage change, year on year)



Source: ECA, on the basis of data from the International Monetary Fund (IMF), “Real GDP growth”, DataMapper database. Available at [www.imf.org/external/datamapper/NGDP\\_RPCH@WEO/OEMDC/ADVEC/WEO\\_WORLD](http://www.imf.org/external/datamapper/NGDP_RPCH@WEO/OEMDC/ADVEC/WEO_WORLD) (accessed on 21 December 2023).

6. As illustrated in figure II, inflation rates in African landlocked developing countries in recent years have been higher than in landlocked developing countries in other global regions and the world average. Since 2018, however, inflation rates in African landlocked developing countries have been consistently lower than average inflation rates in Africa as a whole and are expected to remain lower than the African average in 2023 and 2024. Despite that trend, however, certain African least developed countries have registered some of the highest inflation rates on the continent in recent years. Between 2014 and 2022, Zimbabwe recorded the highest inflation rate among African landlocked developing countries, followed by South Sudan and Ethiopia.

Figure II  
**Inflation rates, 2014–2024**  
 (Percentage change in average consumer prices, year on year)



Source: ECA, on the basis of data from IMF, “Inflation rate, average consumer prices”, DataMapper database. Available at [www.imf.org/external/datamapper/PCPIPCH@WEO/OEMDC/ADVEC/WEOWOR.LD](http://www.imf.org/external/datamapper/PCPIPCH@WEO/OEMDC/ADVEC/WEOWOR.LD). (accessed on 21 December 2023).

Note: Given the extremely high inflation rates registered in Zimbabwe in recent years, which would significantly skew the data on average inflation in African landlocked developing countries as a whole, data from that country are excluded from the above figure.

7. Political instability continues to impede progress on the six priorities of the Vienna Programme of Action. Between 2014 and 2022, Africa as a whole experienced the highest number of successful coups d’état (14) and attempted coups d’état (9) of any global region.<sup>3</sup> African landlocked developing countries witnessed nine coups d’état and four attempted coups during that period.<sup>4</sup> Furthermore, the Sahel subregion has experienced significant terrorism activity, with most activity taking place in border areas between Burkina Faso, Mali and the Niger. Some 71 per cent of all terrorist attacks perpetrated worldwide in 2022 occurred in those three countries, which, in recent years, have consistently ranked among the top 10 countries most affected by terrorism.<sup>5</sup>

8. The global COVID-19 pandemic has also had a devastating impact on Africa, with over 9 million reported cases and 175,443 deaths.<sup>6</sup> However, the true death toll is likely to be much higher, owing to the disruption of health services during the pandemic.<sup>7</sup> The African continent’s heavy reliance on imported medicines and

<sup>3</sup>Center for Systemic Peace, “Integrated Network for Societal Conflict Research data page”. Available at [www.systemicpeace.org/inscrdata.html](http://www.systemicpeace.org/inscrdata.html).

<sup>4</sup> Ibid.

<sup>5</sup> Ibid.

<sup>6</sup> World Health Organization (WHO), WHO COVID-19 Dashboard. Available at [covid19.who.int/?mapFilter=deaths](https://covid19.who.int/?mapFilter=deaths) (accessed on 21 December 2023).

<sup>7</sup> WHO, *World Health Statistics 2023: Monitoring Health for the SDGs, Sustainable Development Goals* (Geneva, WHO, 2023).

vaccines was made clear during the pandemic, underscoring the urgent need to improve the resilience of African health-care systems. To that end, in 2019 ECA and its partners launched a pharmaceutical initiative anchored on the Agreement Establishing the African Continental Free Trade Area in 10 pilot countries, with a focus on pooled procurement, local production and harmonized regulatory standards for medicines. Two landlocked developing African States, namely Ethiopia and Rwanda, are participating in the initiative.

9. Despite the challenges it faces, Africa has significantly improved health outcomes in recent years. Life expectancy at birth increased from 46 years in 2000 to 64.5 years in 2019.<sup>8</sup> Infant mortality decreased from 81 deaths per 1,000 live births in 2000 to 41.6 deaths in 2020.<sup>9</sup> The overall maternal mortality ratio in Africa decreased from 597 to 531 deaths per 100,000 live births between 2014 and 2020.<sup>10</sup> Essential health service coverage improved from 24 per cent in 2000 to 46 per cent in 2019.<sup>11</sup> However, although most African landlocked developing countries saw a decrease in the maternal mortality ratio between 2014 to 2019, that ratio increased in 2020 in Botswana, Burundi, Chad, Eswatini, Malawi, Mali, the Niger and Zimbabwe, partly as a result of the impact of the COVID-19 pandemic.<sup>12</sup>

10. Despite the overall improvement in health outcomes in Africa, there are still significant health disparities, including among African landlocked developing countries. Lesotho, the Central African Republic, Eswatini, Chad and Zimbabwe are the African landlocked developing countries with the lowest life expectancies at birth, at 50.7, 53.1, 57.7, 59.6 and 60.7 years, respectively. Furthermore, South Sudan, Chad, the Central African Republic and Lesotho are among the African countries with the highest maternal mortality rates, which stand at 1,223, 1,063, 835 and 566 deaths per 100,000 live births, respectively. Those figures are far higher than target 3.1 of the Sustainable Development Goals, namely, to reduce the global maternal mortality ratio to less than 70 per 100,000 live births by 2030.<sup>13</sup> The Central African Republic, Chad, South Sudan, Mali and the Niger are among the 10 countries with the highest infant mortality rates on the continent, which stand at 75.4, 66.0, 63.8, 61.6 and 59.5 deaths per 1,000 live births, respectively.<sup>14</sup> Addressing those disparities will require continued investment in public health infrastructure, the strengthening of health systems and efforts to promote equitable access to health care for all Africans.

11. ECA will continue its efforts to ensure that the interests of African landlocked developing countries and the particular challenges they face are reflected in the envisaged successor framework to the Vienna Programme of Action, the details of which will be finalized at the third United Nations Conference on Landlocked Developing Countries, to be held in Kigali in 2024. To that end, ECA, in collaboration with the Office of the High Representative for the Least Developed Countries, Landlocked Developing Countries and Small Island Developing States, convened the High-level Africa Regional Review Meeting in Preparation for the Third United

<sup>8</sup> WHO, Regional Office for Africa, *Tracking Universal Health Coverage in the WHO African Region, 2022* (Brazzaville, WHO, 2022).

<sup>9</sup> WHO, Regional Office for Africa, *Atlas of African Health Statistics 2022: Health Situation Analysis of the African Region – Country Profiles* (Brazzaville, WHO, 2022).

<sup>10</sup> WHO, “Maternal mortality ratio (per 100 000 live births)”, Global Health Observatory database. Available at [www.who.int/data/gho/data/indicators/indicator-details/GHO/maternal-mortality-ratio-\(per-100-000-live-births\)](http://www.who.int/data/gho/data/indicators/indicator-details/GHO/maternal-mortality-ratio-(per-100-000-live-births)) (accessed on 13 November 2023).

<sup>11</sup> WHO, *Tracking Universal Health Coverage in the WHO African Region*.

<sup>12</sup> WHO, “Maternal mortality ratio (per 100 000 live births)”, Global Health Observatory database. Available at [www.who.int/data/gho/data/indicators/indicator-details/GHO/maternal-mortality-ratio-\(per-100-000-live-births\)](http://www.who.int/data/gho/data/indicators/indicator-details/GHO/maternal-mortality-ratio-(per-100-000-live-births)) (accessed on 13 November 2023).

<sup>13</sup> *Ibid.*

<sup>14</sup> WHO, “Infant mortality rate (between birth and 11 months per 1000 live births)”, Global Health Observatory database. Available at [www.who.int/data/gho/data/indicators/indicator-details/GHO/infant-mortality-rate-\(probability-of-dying-between-birth-and-age-1-per-1000-live-births\)](http://www.who.int/data/gho/data/indicators/indicator-details/GHO/infant-mortality-rate-(probability-of-dying-between-birth-and-age-1-per-1000-live-births)) (accessed on 13 November 2023).

Nations Conference on Landlocked Developing Countries. The outcome document of the Meeting, which was held in Botswana in May 2023, will shape and inform discussions at the third United Nations Conference.

### **III. Status of implementation of the priorities of the Vienna Programme of Action**

#### **A. Fundamental transit policy issues**

12. In the Vienna Programme of Action, the significant roles that freedom of transit and transit facilities play in the integration of landlocked developing countries into the global trading system are underscored. The Vienna Programme of Action includes a call for the simplification and standardization of rules and documentation, together with the full and effective implementation of international conventions governing transport and transit and all bilateral and regional agreements, which are crucial to addressing cross-border trade challenges and related transport problems.

13. In a 2021 study, ECA and the African Union Commission found that, overall, regional transit systems led to a reduction in the administrative and financial costs borne by economic operators in transit operations. The establishment of those systems in Africa is hampered, however, by a lack of political will, poor implementation mechanisms, weak information systems to reconcile entry and exit documents, lengthy transit initiation procedures in countries of origin, excessive delays in the issuance of regional bonds and the frequent use of convoys to escort transit vehicles.<sup>15</sup>

14. Landlocked developing countries are, moreover, also likely to benefit from the Protocol to the Treaty Establishing the African Economic Community relating to Free Movement of Persons, Right of Residence and Right of Establishment, which was adopted in 2018. Enhanced and well-managed intra-African free movement of people will improve the development prospects of African landlocked developing countries, facilitating the exchange of skills, knowledge and expertise. As of August 2023, 11 of the 16 African landlocked developing countries had signed the Protocol, of which 3 (Mali, Niger and Rwanda) had also ratified it.<sup>16</sup> Since March 2023, there have been no further ratifications, while 11 more ratifications are required for the Protocol to enter into force.

15. ECA continues to work with various stakeholders to encourage its members to ratify the Protocol and to assist them in its subsequent implementation.

#### **B. Infrastructure development and maintenance**

16. The infrastructure deficit of Africa is a major obstacle to the economic development of African States, and of landlocked developing countries in particular. Transportation infrastructure is uneven across the continent, with some subregions over-equipped and others underdeveloped.<sup>17</sup> Although investments of between \$130 billion and \$170 billion are needed annually to close the continent's infrastructure gap, Africa faces a financing gap of between \$68 billion and \$108 billion.<sup>18</sup> While

<sup>15</sup> ECA, *Identifying Priority Products and Value Chains for Standards Harmonization in Africa: Technical Study* (Addis Ababa, ECA, 2020).

<sup>16</sup> African Union, "List of countries which have signed, ratified/acceded to the Protocol to the Treaty Establishing the African Economic Community relating to Free Movement of Persons, Right of Residence and Right of Establishment", available at [https://au.int/sites/default/files/treaties/36403-sl-PROTOCOL\\_TO\\_THE\\_TREATY\\_ESTABLISHING\\_THE\\_AFRICAN\\_ECONOMIC\\_COMMUNITY\\_RELATING\\_TO\\_FREE\\_MOVEMENT\\_OF\\_PERSONS-1.pdf](https://au.int/sites/default/files/treaties/36403-sl-PROTOCOL_TO_THE_TREATY_ESTABLISHING_THE_AFRICAN_ECONOMIC_COMMUNITY_RELATING_TO_FREE_MOVEMENT_OF_PERSONS-1.pdf).

<sup>17</sup> Graff Tilman, *Spatial Inefficiencies in Africa's Trade Network*, (Cambridge, Massachusetts, National Bureau of Economic Research, 2019).

<sup>18</sup> African Development Bank Group, "Africa's infrastructure: Great potential but little impact on inclusive

landlocked developing countries have made significant improvements in the expansion and upgrading of transport infrastructure, they continue to lack adequate physical infrastructure in rail transport, road transport, dry ports, inland waterways, pipelines and air transport.

17. Although road transport is the dominant mode of transport in Africa, carrying 90 per cent of passengers and 80 per cent of goods,<sup>19</sup> some 53 per cent of African roads are unpaved, limiting access by many Africans to basic amenities and economic opportunities.<sup>20</sup> Less than half the continent's rural population enjoys access to an all-season road.<sup>21</sup> Moreover, damaged roads can reduce operating speeds from 100 to 60 kilometres per hour, exacerbating traffic congestion and increasing the number of road accidents.<sup>22</sup> The average paved road density in African landlocked developing countries is 10.59 km per 1,000 km<sup>2</sup>, which is nearly half the average figure for all landlocked developing countries (24.66 km per 1,000 km<sup>2</sup>).<sup>23</sup> In the past decade, a number of key road infrastructure projects have been implemented in African landlocked developing countries. Those projects include the Kazungula Bridge, which opened to traffic in May 2021 and connects Zambia and Botswana,<sup>24</sup> the Mombasa-Nairobi-Addis Ababa Road Corridor, which links Ethiopia and Kenya,<sup>25</sup> and the multimodal North-South Corridor, which runs from Dar es Salaam in Tanzania to Durban in South Africa, passing through Malawi, Zambia, Zimbabwe and Botswana. The North-South Corridor has become the busiest transport corridor in Southern Africa, with an estimated \$40 billion worth of goods transported every year.<sup>26</sup> In 2022 and 2023, ECA developed a road assessment methodology to support road management in Africa. Using Geographic Information System technology and artificial intelligence to assess the condition of continental and subregional roads remotely, the methodology facilitates efforts to monitor African roads on a regular basis and to provide timely recommendations for action, regardless of whether the roads being assessed are located in remote or insecure areas. ECA, in collaboration with the Ministry of Transport of Ethiopia, has also published a report entitled *Gap Assessment of Logistics Digitalization in Ethiopia*<sup>27</sup> with the aim of deepening understanding of digitalization in the logistics sector and providing recommendations in that area. ECA also continues to provide support to Ethiopia, Kenya and South Sudan to facilitate the establishment of the Lamu Port-South Sudan-Ethiopia corridor, which will provide an alternative route for Ethiopia and South Sudan to connect with the Indian Ocean and maritime transport networks.

18. Rail transport is the continent's second most important mode of transport. The African railway network remains relatively undeveloped, however, and most railway

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growth" in *Africa's Infrastructure* (Abidjan, African Development Bank Group, 2018).

<sup>19</sup> United Nations, Office of the High Representative for the Least Developed Countries, Landlocked Developing Countries and Small Island Developing States, *Improving Transport Connectivity for LLDCs and Building Resilient Transport Infrastructure to Support Accelerated Progress towards the SDGs*.

<sup>20</sup> African Development Bank Group, "Tracking Africa's progress in figures". Available at [www.afdb.org/fileadmin/uploads/afdb/Documents/Publications/Tracking\\_Africa%E2%80%99s\\_Progress\\_in\\_Figures\\_-\\_Infrastructure\\_Development.pdf](http://www.afdb.org/fileadmin/uploads/afdb/Documents/Publications/Tracking_Africa%E2%80%99s_Progress_in_Figures_-_Infrastructure_Development.pdf).

<sup>21</sup> Ibid.

<sup>22</sup> Ibid.

<sup>23</sup> Ibid.

<sup>24</sup> African Development Bank Group, "Kazungula Bridge Project to expand regional integration and trade across southern Africa", 18 May 2021.

<sup>25</sup> African Development Bank Group, "Multinational - Mombasa - Nairobi - Addis Ababa Road Corridor Development Project Phase II - Project Completion Report", 13 December 2019. Available at [www.afdb.org/en/documents/multinational-mombasa-nairobi-addis-ababa-road-corridor-development-project-phase-ii-project-completion-report](http://www.afdb.org/en/documents/multinational-mombasa-nairobi-addis-ababa-road-corridor-development-project-phase-ii-project-completion-report).

<sup>26</sup> African Union Development Agency, *Programme for Infrastructure Development in Africa (PIDA): First 10-Year Implementation Report* (African Union Development Agency, Midrand, South Africa, 2023).

<sup>27</sup> ECA and Ministry of Transport of Ethiopia, *Gap Assessment of Logistics Digitalization in Ethiopia* (Addis Ababa, 2022). Available at <https://repository.uneca.org/handle/10855/49382>.

lines in Africa were constructed by mining companies during the colonial period to connect mines and sources of other natural resources to ports.<sup>28</sup> Africa accounts for less than 90,000 kilometres of railway track, or less than 5 per cent of the world rail network.<sup>29</sup> Moreover, most African railways operate at speeds of only 30 to 35 kilometres per hour, and African rail networks have few interconnections, owing to divergent technical standards.<sup>30</sup> Almost no improvements have been made to railway networks in landlocked developing countries in Africa during the period of implementation of the Vienna Programme of Action. While Eswatini, Malawi and Zimbabwe have the highest rail density among African landlocked developing countries, Burundi, the Central African Republic, Chad, Lesotho and the Niger still lack railway network connectivity.<sup>31</sup> However, the completion and modernization of the Addis Ababa-Djibouti Railway and the Mombasa-Nairobi-Naivasha Standard Gauge Railway are potentially transformative. Improvements to rail infrastructure in Africa could have a significant positive impact on African landlocked developing countries, facilitating the efficient transport of large numbers of passengers and higher volumes of goods at relatively low cost, reducing road congestion and enhancing safety. The electrification of African railways would further promote environmental sustainability.<sup>32</sup> To promote the development of railways in Africa, ECA, in collaboration with the Rail Working Group, continues to encourage the ratification by African countries of the Protocol to the Convention on International Interests in Mobile Equipment on Matters specific to Railway Rolling Stock.

19. Some African landlocked developing countries, including Burundi, the Central African Republic, Rwanda and Uganda, have navigable waterways. However, five landlocked developing countries, namely, Botswana, Burkina Faso, Eswatini, Ethiopia and Lesotho, do not. Dry ports also play an important role in increasing the logistical performance of landlocked developing countries, reducing trade logistics costs and promoting intermodality. Almost half of African landlocked developing countries have dry ports (Burundi, Eswatini, Ethiopia, Rwanda, Uganda, Zambia and Zimbabwe).<sup>33</sup>

20. Africa accounts for 17 per cent of the global population but only 2.1 per cent of total air transport activity (combined cargo and passenger transport).<sup>34</sup> Although the COVID-19 pandemic had a significant negative impact on the aviation industry in Africa, air transport on the continent has recovered steadily in the post-pandemic period, with air cargo standing at 31.4 per cent of 2019 levels and air travel at 93 per cent of 2019 levels by 2023. There is significant growth potential for the airline industry in Africa. Ethiopian Airlines, the national carrier of the continent's largest landlocked developing country by population size, continues to play a particularly prominent role. Through the Single African Air Transport Market, launched in 2018, further liberalization of the skies through the implementation of the Yamoussoukro Decision is encouraged. As of November 2023, 34 States were part of the Single African Air Transport Market, including 11 landlocked developing countries (Botswana, Burkina Faso, Central African Republic, Chad, Eswatini, Ethiopia, Lesotho, Mali, Niger, Rwanda and Zimbabwe).

<sup>28</sup> Export-Import Bank of India, "Connecting Africa: role of transport infrastructure", Working Paper No. 72 (March 2018).

<sup>29</sup> International Union of Railways, "A new lease of life for African rail: destination 2040" (February 2014).

<sup>30</sup> Export-Import Bank of India, "Connecting Africa: role of transport infrastructure".

<sup>31</sup> United Nations, Office of the High Representative for the Least Developed Countries, Landlocked Developing Countries and Small Island Developing States, *Improving Transport Connectivity for LLDCs*.

<sup>32</sup> *Ibid.*

<sup>33</sup> *Ibid.*

<sup>34</sup> International Air Transport Association, "IATA's 'Focus Africa' to strengthen aviation's contribution to African development", 3 April 2023.

21. Power outages and load shedding, which disrupt business activity and reduce the profits of business enterprises, reduce annual GDP in Africa by some 2 per cent.<sup>35</sup> Access to reliable, affordable and sustainable energy is essential for economic development, industrialization, productivity growth and human development, including the achievement of almost all the Sustainable Development Goals. Although the percentage of the population with access to electricity in Africa, excluding North Africa, increased from 38.5 per cent in 2014 to 50.5 per cent in 2021,<sup>36</sup> more than 80 per cent of the global population without access to electricity live in sub-Saharan Africa.<sup>37</sup> African landlocked developing countries have made significant progress in expanding access to electricity, with, in decreasing order, Rwanda, Eswatini, Lesotho, Uganda, Ethiopia, and Mali achieving the largest increases between 2010 and 2021.<sup>38</sup> However, less than 20 per cent of the population of Burkina Faso, Burundi, the Central African Republic, Chad, Malawi, the Niger and South Sudan had access to electricity in 2021.<sup>39</sup>

22. Although the continent is home to 17 per cent of the global population, African fossil fuel emissions accounted for only 3.6 per cent of the global total in 2017. Moreover, if the continent's highest emitters, namely, Algeria, Egypt, Nigeria and South Africa, are excluded from calculations, the continent accounted for only 1 per cent of global carbon dioxide emissions that year.<sup>40</sup> Only 20 per cent of the continent's total installed electricity generation capacity in 2019 was based on renewable sources, with hydropower accounting for the largest share of installed renewable energy capacity. Furthermore, 45 per cent of the continent's 2018 primary energy demand was met with biomass,<sup>41</sup> primarily the burning of firewood and charcoal to cook food, which can have a serious negative impact on human health. The share of modern renewables in total final energy consumption in Africa as a whole decreased slightly from 8.9 per cent in 2014 to 8.8 per cent in 2019.<sup>42</sup> The share also fell in African landlocked developing countries over the same period, from 11.6 per cent in 2014 to 10.7 per cent in 2019.<sup>43</sup> To support efforts to increase the share of renewables in the total energy mix, ECA and its partners have developed an African continental circular economy action plan for the period 2024 to 2034, in which they set out goals and actions to facilitate the development of a continental eco-labelling scheme, the adoption of tax incentives to encourage the use of recycled materials, the standardization of products, the delivery of training courses on ways to establish a circular economy, and the harmonization of trade-related policies that promote the transfer of waste, second-hand goods and goods for refurbishment and remanufacturing to regional recycling or remanufacturing facilities.

23. Africa has made remarkable progress in expanding access to information and communications technology (ICT). In 2014, only 13.5 per cent of Africans used the Internet, compared with 39.7 per cent in 2022. However, that figure was still far below the global average of 66.3 per cent in 2022.<sup>44</sup> Among African landlocked developing

<sup>35</sup> International Renewable Energy Agency, *Africa 2030: Roadmap for a Renewable Energy Future* (Abu Dhabi, 2015).

<sup>36</sup> World Bank, "Access to electricity (% of population)", DataBank database. Available at [data.worldbank.org/indicator/EG.ELC.ACCS.ZS](https://data.worldbank.org/indicator/EG.ELC.ACCS.ZS) (accessed on 13 November 2023).

<sup>37</sup> International Energy Agency and others, *Tracking SDG7: The Energy Progress Report 2023* (Washington, D.C., International Bank for Reconstruction and Development and the World Bank, 2023).

<sup>38</sup> Ibid.

<sup>39</sup> World Bank, "Access to electricity (% of population)", DataBank database. Available at <https://data.worldbank.org/indicator/EG.ELC.ACCS.ZS> (accessed on 13 November 2023).

<sup>40</sup> KfW Development Bank and others, *The Renewable Energy Transition in Africa: Powering Access, Resilience and Prosperity* (Frankfurt am Main, September 2020).

<sup>41</sup> Ibid.

<sup>42</sup> International Energy Agency, "Modern renewables". Available at [www.iea.org/reports/sdg7-data-and-projections/modern-renewables](https://www.iea.org/reports/sdg7-data-and-projections/modern-renewables).

<sup>43</sup> Ibid.

<sup>44</sup> International Telecommunication Union (ITU), "Statistics". Available at [www.itu.int/en/ITU-D/Statistics/Pages/stat/default.aspx](https://www.itu.int/en/ITU-D/Statistics/Pages/stat/default.aspx).



countries, Botswana, Eswatini and Lesotho were the only countries with more Internet users than the continental average in 2021. All other African landlocked developing countries had fewer users than the continental average. Mobile phone penetration in Africa has increased significantly in recent years, rising from 886 million subscriptions in 2014 to 1.2 billion subscriptions in 2022, while the number of mobile phone subscriptions in African landlocked developing countries increased from 149 million to 215 million over the same period. Additionally, African landlocked developing countries have recorded a major increase in the number of subscriptions for active mobile broadband, which rose from 28 million in 2014 to 116 million in 2022.<sup>45</sup>

24. In 2022, Africa was the global region with the least affordable ICT service fees.<sup>46</sup> High prices for ICT continue to prevent African landlocked developing countries from benefiting fully from the digital economy through e-commerce, e-government and digital finance.

25. ECA has conducted a number of studies and provided training courses on digital trade regulatory integration in nine countries, including four landlocked developing countries, namely, Malawi, Uganda, Zambia and Zimbabwe, in order to assist its members in addressing digital trade-related issues, including e-commerce negotiations within the context of the Agreement Establishing the African Continental Free Trade Area. Harmonizing digital trade regulations will be crucial in efforts to develop instant payment systems. Five African landlocked developing countries, namely, Ethiopia, Malawi, Uganda, Zambia and Zimbabwe, have launched domestic instant payment systems, while seven others have established subregional-level systems.<sup>47</sup> Establishing inclusive cross-border payment systems is essential in that it will support the implementation of digital trade, as required under the terms of the Agreement Establishing the African Continental Free Trade Area, and will promote broader financial inclusion.

### C. International trade and trade facilitation

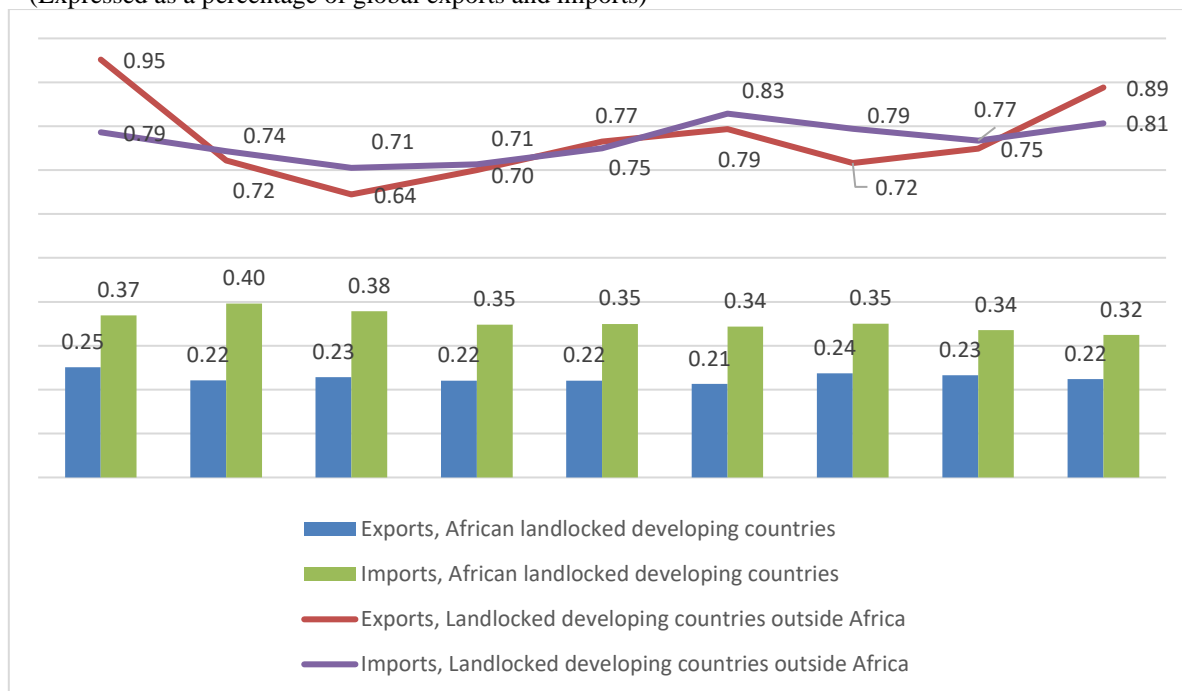
26. During the implementation period of the Vienna Programme of Action, African landlocked developing countries remained marginal players in regional and global trade, accounting for an average of only 0.2 per cent of world merchandise exports and 0.3 per cent of world merchandise imports. Over the same period, landlocked developing countries outside Africa accounted for an average of 0.7 per cent of world merchandise exports and 0.7 per cent of world merchandise imports. As illustrated in figure III, the share of global trade accounted for by both groups of countries remained relatively stable over the implementation period.

<sup>45</sup> ITU, DataHub database. Available at <https://datahub.itu.int/> (accessed on 10 November 2023).

<sup>46</sup> ITU, "The affordability of ITU services 2022", Policy brief (April 2023). Available at [www.itu.int/en/ITU-D/Statistics/Documents/publications/prices2022/ITU\\_Price\\_Brief\\_2022.pdf](http://www.itu.int/en/ITU-D/Statistics/Documents/publications/prices2022/ITU_Price_Brief_2022.pdf).

<sup>47</sup> AfricaNenda, World Bank and ECA, *The State of Inclusive Instant Payment Systems in Africa: SIIPS 2023* (Nairobi, 2023).

Figure III  
**Exports and imports of merchandise by African and non-African landlocked developing countries**  
 (Expressed as a percentage of global exports and imports)

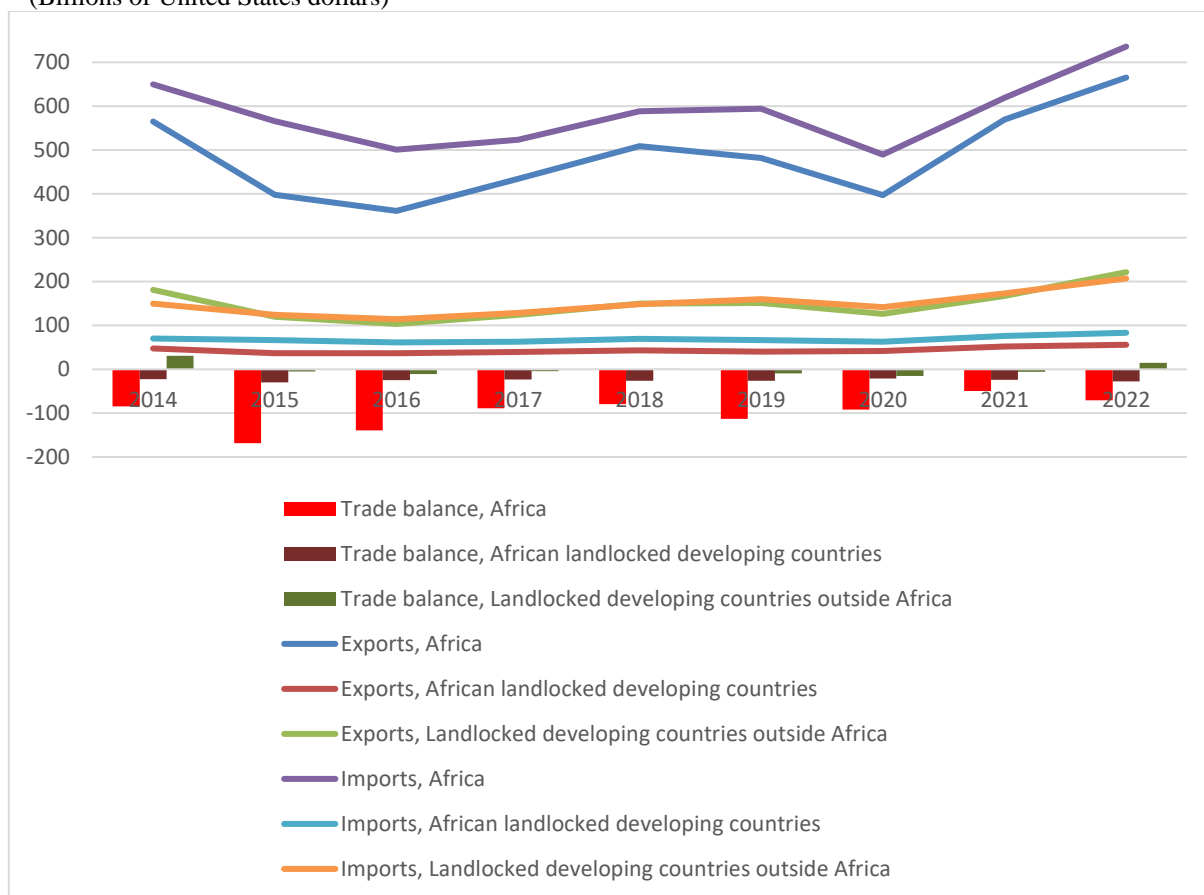


Source: ECA, on the basis of data from the United Nations Conference on Trade and Development (UNCTAD), UNCTADStat database. Available at <https://unctadstat.unctad.org/datacentre/> (accessed on 13 November 2023).

Note: Some data for 2021 and 2022 are preliminary estimates.

27. As illustrated in figure IV, following the continental trend, the trade balance of African landlocked developing countries remained negative between 2014 and 2022. The ongoing trade deficit of those countries reflects their continued dependence on the export of low-value-added commodities and the import of high-value manufactured goods. The economies of African landlocked developing countries appear to be rebounding from the COVID-19 pandemic, with their exports increasing from \$42 billion in 2020 to \$56 billion in 2022 and their imports increasing from \$63 billion to \$83 billion over the same time period. Moving forward, the trade outlook for African landlocked developing countries, and African countries more generally, will depend on their resilience to shocks stemming from the COVID-19 pandemic, the war in Ukraine, the war between Israel and Hamas and the negative repercussions of climate change.

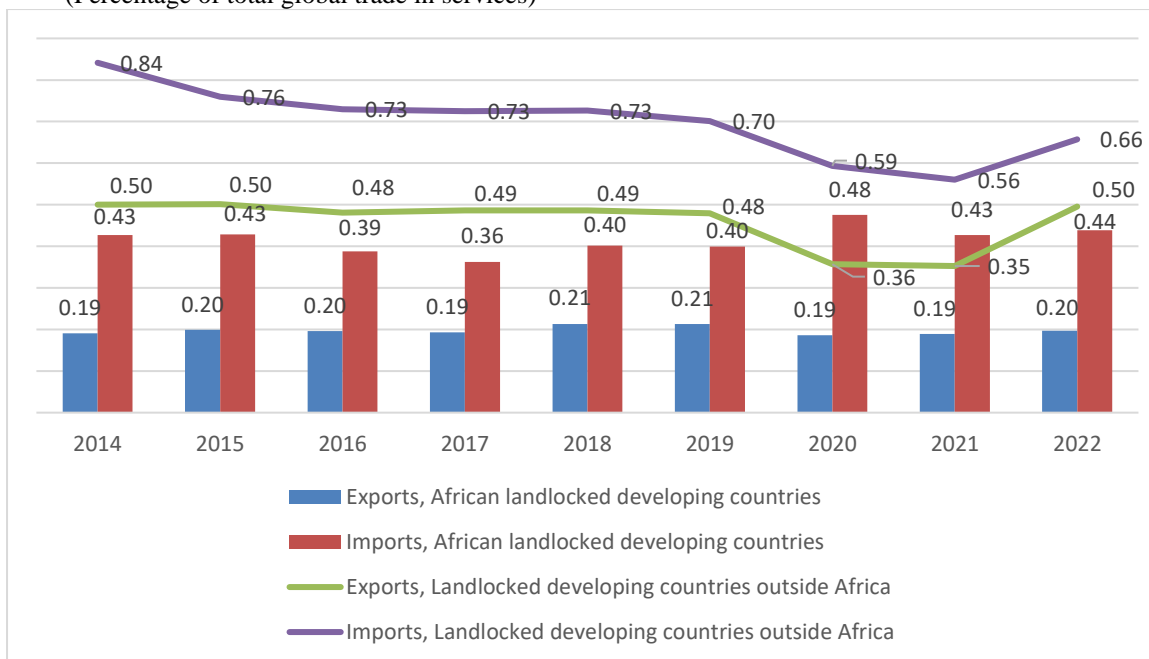
Figure IV  
**Trade in merchandise statistics for Africa as a whole, African landlocked developing countries and landlocked developing countries outside Africa**  
 (Billions of United States dollars)



Source: ECA, on the basis of data from UNCTAD, UNCTADStat database. Available at <https://unctadstat.unctad.org/datacentre/> (accessed on 13 November 2023).

28. As illustrated in figure V, between 2014 and 2022, trade in services by African landlocked developing countries was extremely low, accounting for only 0.2 per cent of global service exports and 0.4 per cent of global service imports. Landlocked developing countries outside Africa experienced a sharper decline in exports and imports of services than African landlocked developing countries in 2020 and 2021, but their trade in services recovered, approaching pre-pandemic levels in 2022.

Figure V  
**Exports and imports of services by African landlocked developing countries and landlocked developing countries outside Africa**  
 (Percentage of total global trade in services)



Source: ECA, on the basis of data from UNCTAD, UNCTADStat database. Available at <https://unctadstat.unctad.org/datacentre/> (accessed on 13 November 2023).

#### Implementation of the Agreement on Trade Facilitation of the World Trade Organization

29. As at 7 November 2023, 14 African landlocked developing countries and 16 transit countries had ratified the Agreement on Trade Facilitation of the World Trade Organization (WTO). Ethiopia and South Sudan are unable to become parties to the Agreement, as they have not yet acceded to WTO. The average implementation rate of the commitments prescribed in the Agreement was 52.3 per cent for Africa as a whole and 50.7 per cent for African landlocked developing countries (up from 46.7 per cent and 44.1 per cent, respectively, in November 2022), underscoring the strong commitment of African landlocked developing countries to implement the provisions of the Agreement.<sup>48</sup> In that regard, it should be noted that Botswana, Rwanda and Zimbabwe have already implemented more than 80 per cent of the commitments prescribed in the Agreement.

#### D. Regional integration and cooperation

30. Efforts to promote regional integration are vital in addressing the fragmentation of Africa, a continent of more than 50 States, 41 currencies and 1.3 billion people. They are particularly important for African landlocked developing countries, which face a number of complex challenges.

31. The signing in Kigali in 2018 of the Agreement Establishing the African Continental Free Trade Area is undoubtedly the continent's most significant achievement in recent years in the area of regional integration.<sup>49</sup> As of September 2023, 47 countries, including all African landlocked developing countries except

<sup>48</sup> WTO, "Implementation commitments dashboard", Trade Facilitation Agreement Database. Available at [tfadatabase.org/en/implementation](https://tfadatabase.org/en/implementation) (accessed on 13 November 2023).

<sup>49</sup> ECA, *The AfCFTA: What You Need to Know – Frequently Asked Questions & Answers* (Addis Ababa, 2023).

South Sudan, had deposited their instruments of ratification.<sup>50</sup> In February 2023, ECA hosted a meeting to discuss how the Agreement and its protocols could be leveraged to overcome the particular complex challenges faced by African landlocked developing countries and small island developing States.

32. The establishment of the African Continental Free Trade Area is expected to have a positive impact on the continent's share of global GDP, trade balance and output. It has been calculated that intra-African trade could be as much as \$204.5 billion higher in 2045 than it would be in the absence of the African Continental Free Trade Area (an increase of 34.6 per cent), with the largest increases occurring in the agrifood, services, industry and energy/mining sectors.<sup>51</sup> Moreover, ECA and the African Union Commission are currently conducting a study on the Boosting Intra-African Trade Initiative of the African Union in order to assess the progress achieved in that regard and challenges impeding its implementation.<sup>52</sup>

33. ECA, the African Union Commission and their partners have also promoted implementation of the Agreement Establishing the African Continental Free Trade Area by helping some 30 member States develop national implementation strategies. Ten African landlocked developing countries have benefited from the support provided by ECA, namely, Burkina Faso, Burundi, the Central African Republic, Eswatini, Malawi, the Niger, Rwanda, South Sudan, Zambia and Zimbabwe. ECA will, moreover, convene a conference in Nairobi in early 2024 to encourage the sharing of experiences and best practices by States that have received support in the development of their implementation strategies. ECA has also developed the African Continental Free Trade Area Country Business Index to capture the views of the private sector on implementation. Furthermore, ECA is currently assessing the impact of implementation on African greenhouse gas emissions. Its preliminary findings indicate that implementing the Agreement would considerably increase intra-African trade without causing a significant increase in pressure on the climate, and that efforts should be made to promote continental coordination of carbon pricing mechanisms if countries decide to establish a single or multiple carbon markets.

34. With the establishment of the African Continental Free Trade Area, African landlocked developing countries can expect to benefit from increased trade, reduced trade costs, improved competitiveness, increased foreign investment and enhanced regional integration.

## **E. Structural economic transformation**

35. Despite significant efforts to expand their private sectors and improve their manufacturing, scientific, technological and innovative capacity, African landlocked developing countries still face the challenge of sustaining structural economic transformation.

36. As illustrated in figure VI, the services sector contributed the most to African GDP in 2022, at 46 per cent, followed by industry at 28 per cent and agriculture at 17 per cent.<sup>53</sup> In African landlocked developing countries, the services sector contributed 44 per cent of GDP, followed by industry at 26 per cent and agriculture at 21 per cent (see figure VII), suggesting that the economies of African landlocked developing countries are slightly more reliant on agriculture than other African countries. The services sector was a particularly large contributor to GDP in Zimbabwe, Botswana and Malawi in 2022, at 58 per cent, 56 per cent and 55 per cent, respectively.

<sup>50</sup> Trade Law Centre NPC, "Status of AfCFTA ratification", 6 September 2023.

<sup>51</sup> ECA and Centre d'études prospectives et d'informations internationales, "Greening the implementation of the African Continental Free Trade Area Agreement" (forthcoming).

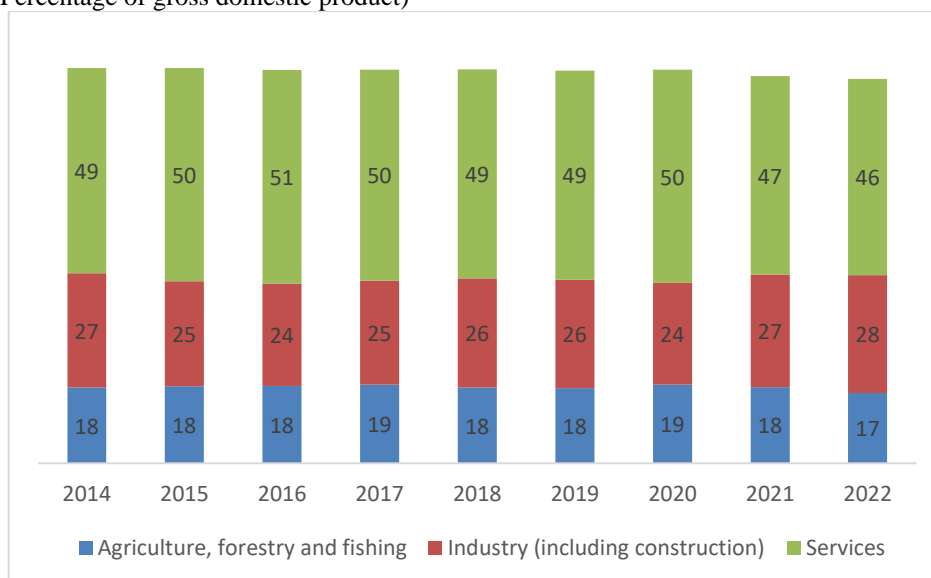
<sup>52</sup> ECA, "Framework for boosting intra-African trade (BIAT), ten-years after: progress, implementation challenges, and implications for the AfCFTA" (forthcoming).

<sup>53</sup> World Bank, DataBank database. Available at <https://data.worldbank.org/> (accessed on 13 November 2023).

Moreover, the only African landlocked developing country in which industry, including construction, contributed more to GDP than the services sector was Chad, where it contributed 49.5 per cent of GDP in 2022. Ethiopia was the only landlocked African country where agriculture, forestry and fishing contributed more to GDP than other sectors (a combined total of 38.6 per cent of GDP in 2022).

Figure VI

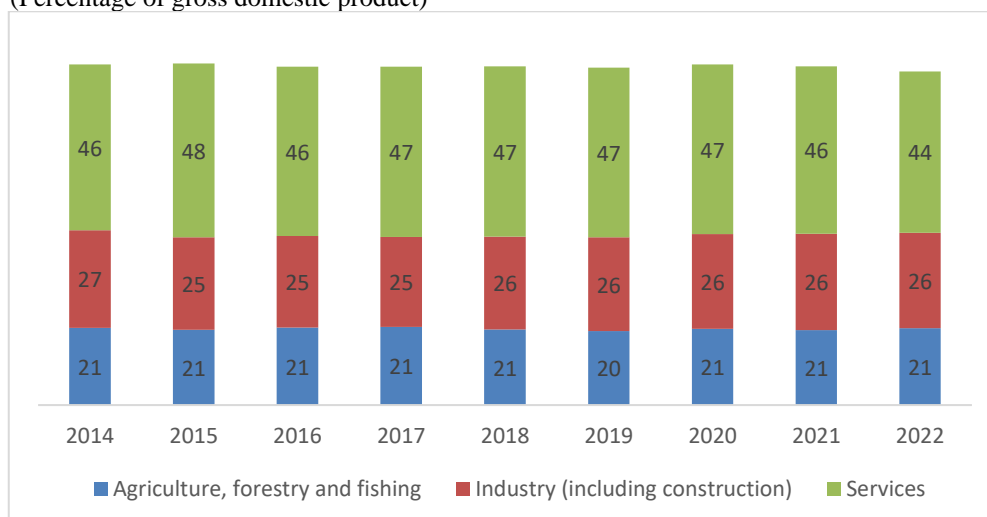
**Value added generated in African countries by various economic sectors, 2014–2022**  
(Percentage of gross domestic product)



Source: ECA, on the basis of data from the World Bank.

Figure VII

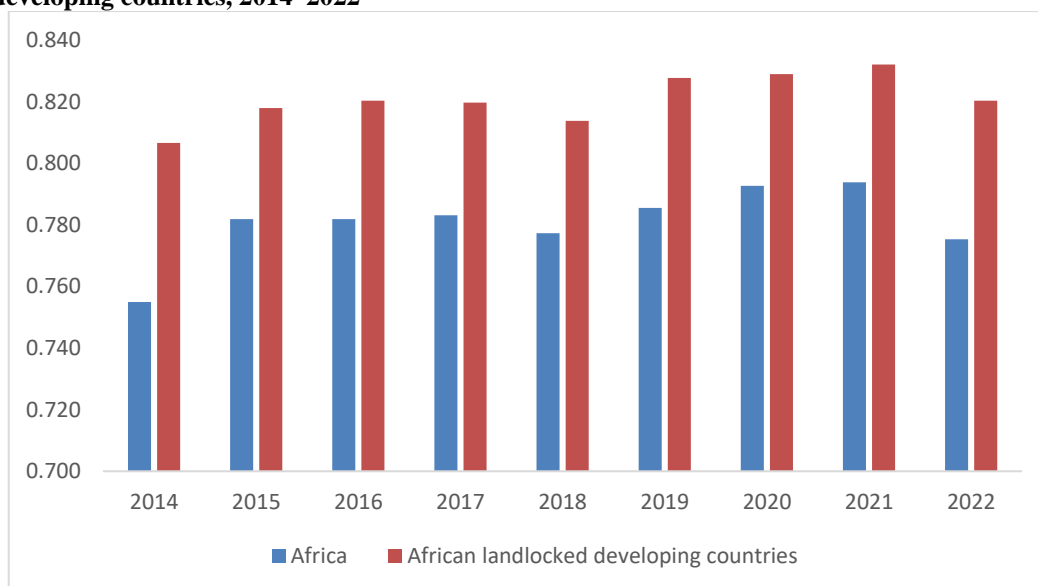
**Value added generated in African landlocked developing countries by various economic sectors, 2014–2022**  
(Percentage of gross domestic product)



Source: ECA, on the basis of data from the World Bank.

37. One of most significant economic changes that has occurred in certain African landlocked developing countries has been the increase in the economic contribution of the industrial sector, including construction. In Ethiopia, for example, the contribution to GDP of industry, including construction, increased from 13.5 per cent of GDP in 2014 to 22.7 per cent in 2022, an increase of some 40 per cent, while in Chad it rose from 39.7 per cent to 49.5 per cent over the same period.

Figure VIII  
**Export product diversification index, Africa as a whole and African landlocked developing countries, 2014–2022**



Source: ECA, on the basis of data from UNCTAD, UNCTADStat database. Available at <https://unctadstat.unctad.org/EN/> (accessed on 13 November 2023).

Note: Index values closer to 1 indicate greater divergence from the global average.

38. Although Botswana, the Niger, Rwanda and Zambia made progress in export diversification between 2014 and 2022, overall export diversity decreased among African landlocked developing countries during that period (see figure VIII). The Central African Republic, Eswatini, and Rwanda had the most diversified exports in 2022, while Botswana, Lesotho and Mali had the most concentrated exports. Export product diversification is of vital importance for African countries if they are to promote economic growth, broaden their industrial base, improve their trade terms with trading partners and enhance their resilience to economic shocks.

## F. Means of implementation

39. Limited financial, technical and human resources continue to hinder efforts by African landlocked developing countries to implement the Vienna Programme of Action. The COVID-19 pandemic exacerbated those challenges. Indeed, the debt burdens of many developing economies increased rapidly during the pandemic, including as a result of increased spending to support national health systems and to mitigate the negative economic repercussions of the pandemic. Moving forward, foreign direct investment, official development assistance and remittances from abroad will remain critical in providing the critical resources needed to promote development in African landlocked developing countries.

40. Malawi, Zambia and Zimbabwe are currently in debt distress, and Burundi, the Central African Republic, Chad, Ethiopia and South Sudan present a high risk of overall debt distress. Burkina Faso, Lesotho, Mali, the Niger and Rwanda also face a moderate risk of overall debt distress.<sup>54</sup>

41. As illustrated in figure IX, foreign direct investment flows to Africa reached a record level of \$79.6 billion in 2021. That figure was, however, skewed by a single

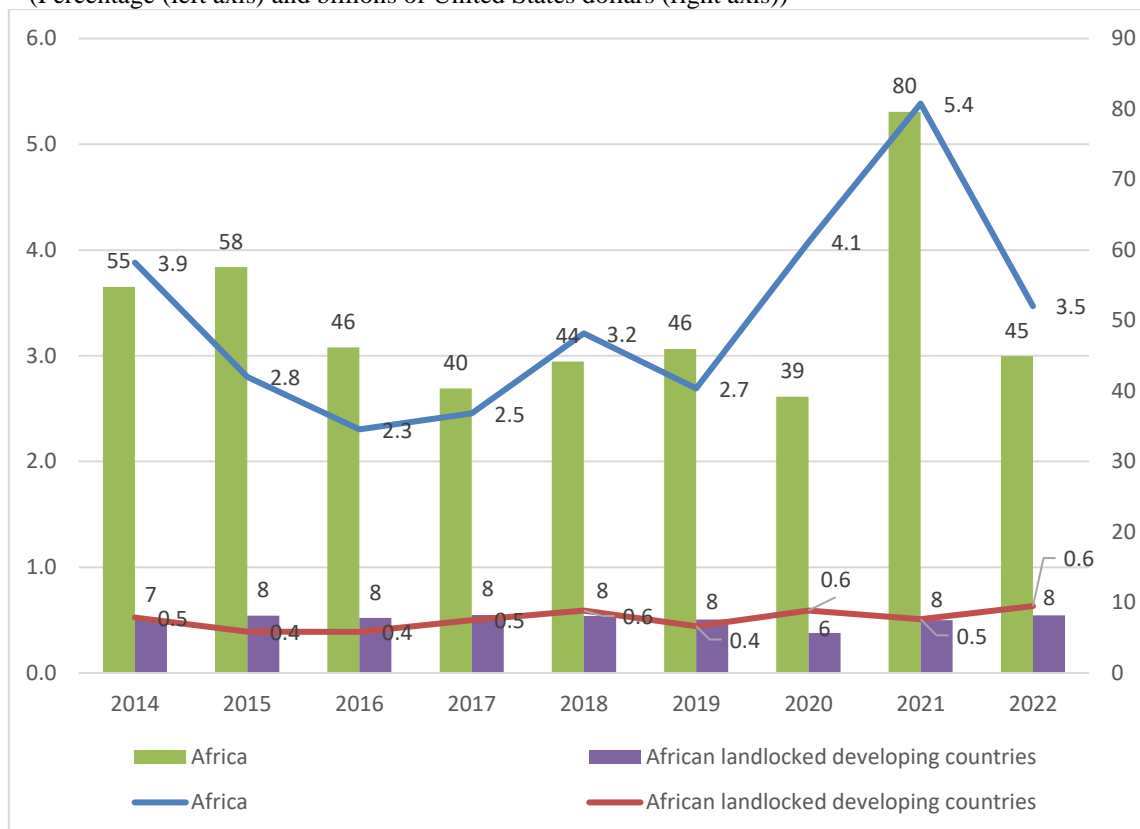
<sup>54</sup> World Bank, “Debt Sustainability Analysis”, Debt & Fiscal Risks Toolkit. Available at [www.worldbank.org/en/programs/debt-toolkit/dsa](http://www.worldbank.org/en/programs/debt-toolkit/dsa) (accessed on 8 November 2023).

intrafirm financial transaction in South Africa.<sup>55</sup> If that transaction is excluded from the analysis, it can be seen that foreign direct investment in African landlocked developing countries has remained relatively constant since 2014. Ethiopia, Uganda and Zambia were the largest receivers of foreign direct investment among landlocked developing countries in Africa between 2014 and 2022.

Figure IX

**Foreign direct investment inflows and share of world foreign direct investment, Africa as a whole and African landlocked developing countries, 2014–2022**

(Percentage (left axis) and billions of United States dollars (right axis))



Source: ECA, on the basis of data from UNCTAD, UNCTADStat database. Available at <https://unctadstat.unctad.org/EN/> (accessed on 13 November 2023).

42. Between 2014 and 2021, developing countries received more than \$1.4 trillion in official development assistance, with more than a third of that amount (\$507 billion) directed to African countries. In the same period, African landlocked developing countries received approximately \$159 billion in official development assistance. Among African landlocked developing countries, the largest recipients of official development assistance between 2014 and 2021 were Ethiopia, Mali, the Niger, South Sudan and Uganda.<sup>56</sup>

43. Unlike foreign direct assistance and official development assistance, remittances comprise direct money transfers from household to household, providing families immediate access to funds. Between 2014 and 2022, personal remittances grew from 0.7 to 0.8 per cent of global GDP. In Africa, excluding North Africa, that contribution was, on average, three times higher and accounted for 2.1 per cent and 2.6 per cent of African GDP in 2014 and 2022, respectively. Remittances make a significant contribution to GDP in a number of African landlocked developing

<sup>55</sup> UNCTAD, “World investment report 2022: regional trends Africa – highlights”. Available at [unctad.org/system/files/non-official-document/WIR2022-Regional\\_trends\\_Africa\\_en.pdf](https://unctad.org/system/files/non-official-document/WIR2022-Regional_trends_Africa_en.pdf).

<sup>56</sup> Organisation for Economic Co-operation and Development, “Aid (ODA) disbursements to countries and regions [DAC2a]”, OECDStat database. Available at <https://stats.oecd.org/Index.aspx?DataSetCode=TABLE2A#> (accessed on 15 November 2023).



countries, including Lesotho, Mali and Zimbabwe. In 2022, remittances accounted for 25.7, 6.0 and 11.3 per cent<sup>57</sup> of those countries' GDP, respectively. Remittance flows to all African landlocked developing countries except Burundi and Ethiopia increased between 2014 and 2021.

44. Science, technology and innovation are essential for promoting structural transformation in African landlocked developing countries. Uganda, Botswana and Rwanda, in decreasing order, were the leading African landlocked developing countries in the Global Innovation Index ranking in 2014, and Zimbabwe has joined Botswana and Rwanda to take the lead in 2023. Botswana is now the continent's second most innovative economy, while Rwanda is performing above its level of development and leading the low-income group.

## IV. Conclusion and recommendations

45. African landlocked developing countries have made considerable efforts and progress towards implementing the Vienna Programme of Action, despite the many interlocking crises they have faced between 2014 and 2023. As 2024 approaches, however, those countries have yet to reach many of the targets prescribed in the Programme of Action. Insufficient financial and human resources are among the main constraints impeding its full implementation. To accelerate the development of African landlocked developing countries, ECA should continue working with policymakers, the private sector, development banks, United Nations entities and other relevant partners in order to:

(a) Contribute to the drafting and implementation of a successor programme of action for African landlocked developing countries, building on the lessons learned during implementation of the Vienna Programme of Action and its synergies with the Doha Programme of Action for the Least Developed Countries;

(b) Collaborate with development finance partners to secure the resources needed to implement the new programme of action for African landlocked developing countries, including in the context of efforts by ECA to encourage reforms to the global financial architecture;

(c) Support efforts by African landlocked developing countries to ratify and implement international and regional agreements, such as the Agreement Establishing the African Continental Free Trade Area, the Protocol to the Treaty Establishing the African Economic Community relating to Free Movement of Persons, Right of Residence and Right of Establishment, and the Agreement on Trade Facilitation;

(d) Enhance its support to members to facilitate their efforts to build resilient health systems to promote the health and productivity of their populations, including within the context of the pharmaceutical initiative anchored on the Agreement Establishing the African Continental Free Trade Area;

(e) Collaborate with African development institutions to catalyse investments to address gaps in transport infrastructure, renewable energy, ICT, digital transformation, industrialization and regional integration, with a view to fostering sustainable development in Africa, promoting a circular economy and enhancing coordination in the area of carbon pricing;

(f) Promote capacity-building with a view to supporting efforts to design bankable projects and mobilize resources for transport infrastructure development in African landlocked developing countries;

(g) Advance structural economic transformation, focusing on increasing value addition in the manufacturing and agricultural sectors, further integrating

<sup>57</sup> <https://data.worldbank.org/indicator/BX.TR.F.PWKR.DT.GD.ZS?end=2022&start=1970&view=chart>  
(accessed on 29 December 2023)

landlocked developing countries into global and regional value chains, encouraging economic and export diversification and promoting formal and decent employment.

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