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BRIDGES AFRICA

Trade and Sustainable Development News and Analysis on Africa

VOLUME 1, ISSUE 5 - OCTOBER 2012



Tapping the potential

LDCS

Trade-related measures in support of graduation and smooth transition

REGIONAL AND MULTILATERAL COMMITMENTS

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International Centre for Trade
and Sustainable Development

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Editorial



This edition of Bridges Africa looks at a variety of issues of importance to the African continent, ranging from regional integration to the need for an orderly and predictable phase-out of trade-related support for least-developed countries graduating from the LDC category, and the role that agribusiness could play in boosting both yields and incomes of Africa's farmers. And finally, this issue examines the sustainable development implications of the vertiginous rise in illegal trade in rhino horn.

Regional integration holds much promise for Africa's economic development, but it also faces formidable challenges due to overlapping entities – many countries belong to multiple regional groupings – as well as potential difficulties in reconciling regional aspirations with pre-existing multilateral commitments. East Africa, for instance, plans to adopt a new common external tariff as part of its deeper integration strategy. Some countries of the bloc, however, have bound their tariffs at the WTO at lower levels than the projected common regional tariff, which may put them in contradiction with their multilateral engagements. In this issue, El Hadji Diouf outlines possible ways to solve this dilemma.

Poaching is decimating South Africa's iconic rhino populations at an appalling rate, threatening not only the species' survival, but also the conservation, employment and economic gains brought by ecotourism. With black market rhino horn now fetching higher prices per kilo than gold, poachers have stepped up their activities. From just 13 animals killed in 2007, this year's tally has already reached 445, surpassing the previous record toll of 448 for 2011.

While international trade in rhinos/rhino parts is prohibited, a debate has emerged on whether black market trade could be curbed through allowing limited trade in legally obtained horns from animals that die of natural causes or are farmed, not killed, for horn production. Advocates and opponents of this proposal are likely to engage in lively exchanges at next year's CITES Conference of the Parties in Bangkok.

We hope you will find these stories interesting and invite you to submit articles for review.

The Bridges Africa team

LDCS

Trade-related measures in support of graduation and smooth transition from the LDC category

Roland Mollerus

Trade-related international support measures should be used more extensively in order to assist least-developed countries in using trade as an engine for growth. One of the limitations of improved use of the measures is the lack of information about their availability. There is also a need for more concrete measures by the international community for a gradual phase-out the trade-related support measures to allow countries graduating from the LDC category to prepare for a smooth transition.

Trade is an important channel for achieving development. One of the key development challenges faced by least-developed countries (LDCs), most of which are located in Africa, is the need to increase exports by adding more value, addressing structural bottlenecks, accessing more markets and further integration into the world trading system. It is generally acknowledged that these countries are disadvantaged due to their reduced trading capacity and limited resources.

What support has been available to LDCs in the trade area? How successful have the measures been? These questions merit renewed attention considering the ambitious goal in the Istanbul Programme of Action for LDCs of enabling half the number of LDCs to meet the criteria for graduation by 2020. In Istanbul, the international community also recognised that the graduation process should be linked to a package of incentives and support measures to ensure that the development process of graduated countries will not be put at risk.

Raising awareness of trade-related support

In recognition of LDCs' special economic situation and their development, economic and financial needs, members of the GATT and the WTO agreed to grant these countries 'special and differential treatment' (SDT) including non-reciprocal preferential market access (beyond what is usually granted to other developing countries). The LDC-specific SDT provisions fall into five main categories: (i) increased market access; (ii) safeguarding the interests of LDCs; (iii) increased flexibility within the rules and disciplines governing trade measures; (iv) longer transitional periods; and (v) technical assistance. These measures were expected to spur further LDC growth and integration into the world trading system.

By and large, the consensus is that special and differential treatment has had only a limited impact on expanding African LDCs' exports and promoting their further integration into the world trading system. This is partly due to the way the measures have been designed and implemented. For example, stringent rules of origin prevent LDCs from realising their full market access potential in a number of countries. They also face difficulties in obtaining information about the whole range of available support. In response to the need for a single source of information on all these measures, the UN has developed the [LDC information portal](#), which also provides access to research and analysis related to their use.

Improving access and utilisation

In designing the portal, the UN conducted a series of surveys with LDCs – 15 in Africa – on the awareness and use of SDT provisions. In addition to the lack of information on support measures, LDCs reported a number of market access barriers. Fewer problems were encountered with regard to capacity-building and longer transition periods for implementing certain WTO obligations. Nevertheless, even when LDCs do have relatively easy access, special and differential treatment often needs to be complemented by other policy interventions. Unfortunately, in most cases, the measures lack enforcement mechanisms and are based on voluntary assistance.

The surveys also indicated that the use of SDT is constrained by severe institutional capacity gaps, including communication and coordination failures. LDCs need to improve inter-ministerial coordination on trade policies, as well as linkages with the private sector. A starting point should be the design and integration of analytical tools to consider priority SDT and how these measures can support the country's overall trade and development policies. Raising awareness, stepping up presence in critical areas of trade discussions in Geneva, and building better institutional memory about access to and utilisation of support measures are other crucial factors in enabling governments to improve their use of SDT. Ongoing capacity development activities in Africa demonstrate that improvements in interactions with donors and trading partners achieve results and can lead to improved use of support measures.

Towards reducing the number of LDCs: the importance of smooth transition

Fast forward into the future: more developmentally effective SDT, better information and an improved ability to utilise international support measures should help countries graduate from the LDC category. There is, however, a general concern among LDCs that graduation may lead to a sudden loss of support and, as a result, cause disruptions and a reversal of progress achieved. So-called 'smooth transition' measures to phase out LDC-specific support aim to alleviate these concerns.

LDC criteria, support and graduation

The category of least-developed countries (LDCs) was created in recognition of the need to alleviate the problems of underdevelopment amongst the poorest countries. From its inception in 1971, the category has comprised countries that are persistently falling behind due to their structural problems and vulnerabilities.

Criteria: To be officially recognised as an LDC, a country must fulfil the following criteria: a per capita income level under US\$992; low level of human development (nutrition, health, education and adult literacy); and economic vulnerability including, inter alia, such factors as merchandise export concentration, share of agriculture, forestry and fisheries in GDP, and instability of goods and services exports.

Graduation: Countries that meet the criteria for graduation in at least two of the criteria above – or whose income per capita is at least twice the graduation threshold level – for two consecutive reviews are recommended for graduation from the LDC category and thus stand to lose international support associated with LDC status.

Support: LDCs receive special assistance from the international development community to address their problems of underdevelopment. Broadly speaking, the special international support measures fall into three categories: i) Official Development Assistance (ODA), ii) trade-related measures, and iii) other measures such as travel allowances to promote the participation in intergovernmental meetings.

In response to the lack of guidelines to support LDCs' graduation, a UN General Assembly resolution (A/RES/59/209) put in place a smooth transition framework in 2004. The resolution does not contain any mandatory provisions related to LDCs' trading partners. Instead, it *invites* the latter to extend non-reciprocal trade preferences to graduated countries and to *consider* extending preferential treatment for a period appropriate to their development situation. Since the adoption of the resolution, no phase-out mechanisms have been introduced for most trade-related support measures. Exceptions are found in time-limited extensions of preferential markets access schemes and the Enhanced Integrated Framework.

Main trading partners' responses to the UN survey showed diverging views regarding the extension of trade benefits to graduated countries. Some countries said they were in favour of providing a limited transition period with respect to special and differential treatment and exemptions available to LDCs under the WTO. Others suggested that

graduated countries would be removed from the list of beneficiaries of LDC-specific trade preferences. While WTO decisions related to LDC-specific SDT do not contain smooth transition provisions, a recent decision on preferential treatment for LDCs' services and service suppliers terminates such treatment for graduated countries.

In short, there is no common understanding of what 'smooth transition' implies. Measures have been taken in an ad-hoc manner and are not granted by all partners. In this context, and as a follow up to the Istanbul programme of Action, a recent review at the UN of the smooth transition process for countries graduating from the LDC category stressed the importance of continued LDC-specific support for graduated countries and more formal procedures for extended time frames during the transition. The renewed attention at the UN to the importance of partners in the gradual phasing out of SDT is a welcome start. But, in tandem with the diplomatic push at the UN, formalising the phase-out of smooth transition measures will also require agreement from the WTO membership. To grant extensions of individual SDT provisions to graduated LDCs, WTO members would need to obtain a waiver (akin to the waiver used for granting LDC-specific trade preferences). Given the considerable number of LDC-specific support measures, one option that could be explored is granting graduated countries a time-bound waiver covering all LDC-specific support measures for a given transition period.

Conclusions

The LDC portal should be used as a central source of information cataloguing the wide range of LDC-specific international support measures that can improve LDCs' capacity to use the support and to prepare smooth transition strategies. The goal of enabling at least half of the 48 LDCs to meet the criteria for graduation by 2020 reinforces the need to raise awareness, understanding and utilisation of LDC-specific trade-related support.

Recently graduated countries have shown high levels of concern over the lack of continued support after graduation. A renewed push to establish a formal framework of concrete and predictable measures for phasing out LDC-specific support is required. UN efforts to strengthen the smooth transition process are a start, which can lead to a new resolution with concrete steps for further action. These negotiations should be followed up in Geneva with least developed countries and other supportive WTO members, starting a diplomatic drive for formal agreement on trade-related transitional measures for recently graduated LDCs.



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REGIONAL AND MULTILATERAL COMMITMENTS

West Africa's new common external tariff and the individual WTO commitments of ECOWAS member states: No insurmountable incompatibilities

El Hadji Abdourahmane Diouf

Certain members of the Economic Community of West African States (ECOWAS) could face difficulties in continuing their regional integration process due to a lack of coherence between their multilateral commitments and the new common external tariff envisaged by the group. Building on concrete examples, this article refocuses the debate and offers some guidance on possible legal solutions.

The 16-strong Economic Community of West African States has decided to establish a common external tariff (CET), which is currently being finalised. The tariff, set at 35 percent at most, will modify the rights and obligations ECOWAS member countries. This may create a contradiction between the WTO commitments of individual countries and the requirements of the regional trade integration project essential for West Africa's economic development.

National, regional and multilateral policies are not necessarily coherent or complementary. At first sight, the requirement of WTO compliance jeopardises new commitments at the regional level, but a close reading of WTO law allows us to conclude ECOWAS is likely to be able to continue its regional integration while keeping its new external tariff.

The CET is a priori incompatible with the individual commitments of WTO members

WTO data clearly shows that the application of the ECOWAS common external tariff – both for agriculture and industry – would be a problem with regard to respecting the individual commitments undertaken by the group's members at the multilateral level.

All West African countries have lower applied agricultural tariffs than those they have bound at the WTO. Nigeria, for instance, has bound its tariff for agricultural products at 150 percent, while its applied tariff is only 33.6 percent. The bound tariffs of Gambia, Burkina Faso and Ghana vary between 140 and 97.1 percent. The least 'protected' countries in the region have 'reasonable' bound levels in comparison to the tariffs they actually apply. This is the case for Senegal and Guinea Bissau, which have a smaller margin of manoeuvre to adjust their customs tariffs in case of sudden changes in trade flows. The Ivory Coast is exceptional in that its bound and applied tariffs are almost identical at the relatively low level of 14.9 percent.

The picture is less homogenous for industrial products. Togo and Nigeria have high bound tariffs at 80 and 66 respectively. At the other end of the spectrum, Benin, Guinea, Ivory Coast and Mauritania are already in the danger zone as their applied rates are higher than those bound at the WTO.

From a legal perspective, this situation is problematic in two principal ways. First, for some ECOWAS countries the proposed CET is higher than their bound WTO commitments, and second, raising tariffs may have negative impacts on other WTO members.

Problem 1: The CET is higher than bound tariffs

With regard to agricultural products, the application of the envisaged rate of 35 percent will entail legal difficulties for all countries that have bound their tariffs lower than the CET (the argument of applied tariffs does not really apply here). Rather, the legal issue is linked to a discrepancy between binding commitments taken at the multilateral level

and problems arising from the desire to establish a regional commercial and agricultural policy. Unless they are granted special waiver, ECOWAS members cannot use a new regional policy as a pretext to exceed their bound commitments.

All but two ECOWAS countries have bound agricultural tariffs above the projected 35-percent CET. However, Senegal with its bound tariff of 29.8 percent will not a priori be able to apply the new common external tariff without a prior revision procedure. The Ivory Coast is in an even worse position since its current bound tariff of 14.9 percent is so low that even a CET limit of 20 percent would be too much.

The same logic applies to industrial products. On the one hand, a group of countries has bound tariffs above the 35-percent ceiling, while eight countries could face difficulties as their bound tariffs are too low to allow automatic application of the regional CET. This would be the case for Ivory Coast, Benin, Burkina Faso, Guinea, Mali and Mauritania (bound tariffs between 9 and 15.5 percent), as well as Senegal (30 percent) and, to a lesser degree, Ghana (34.7 percent).

So, it seems that the application of CET would face legal problems with regard to the existing individual commitments of ECOWAS members. This problem could be solved in two ways at the WTO.



Solution 1: Countries can choose the status quo

Under this scenario, the ECOWAS customs union with a common external tariff enters into force, leaving some member states in breach of their multilateral commitments. However, WTO law allows for the modification of schedules of concessions with the proviso that the country in

question offers 'compensatory adjustment' in the form of lower tariffs on other products (GATT Article XXVII.2). Another WTO provision is of even greater interest in that it could secure the maintenance of the CET without compensatory payments. Indeed, GATT Article XXIV.6 provides that in determining compensation "due account shall be taken of the compensation already afforded by the reduction brought about in the corresponding duty of the other constituents of the [customs] union." ECOWAS members' combined average bound rates for both agricultural and industrial products are well above the CET ceiling. This system of internal compensation within a customs union would result in higher gains than losses for other WTO members. The overall situation of the region means that member countries' individual schedules of concessions are unlikely to be affected. In this case, the region would not need to make compensatory payments even if some countries' bound tariffs are lower than the CET.

Solution 2: Modify schedules of commitment

One way to go about this is through modifying the schedule of concessions. Not only does the WTO offer this possibility through the GATT Article 18 procedure, but the solution has the advantage of having already been tested by Gabon. The country's authorities noted in 2007 that their industrial product tariffs were bound 15 percent at the WTO, while the duty actually applied was 18 percent under the common external tariff of the Central African Economic and Monetary Community (CAEMC). Faced with a problem of legal inconsistency, they requested the WTO to grant them permission to modify Gabon's schedule of concession as envisaged in Article 18. In 2008, the WTO Committee on Market Access authorised the country to raise its bound tariff to 18 percent. It should be noted that to optimise its chances, Gabon invoked its status as a 'small and vulnerable economy', putting forward several indicators, which were taken into account by the WTO. According to latest news, Gabon has submitted a second request asking to increase its bound tariff from 18 to 28 percent. West African countries should emulate this. A priori,

the only difficulty in using this procedure is the lack of grouped solution; every country must initiate its own request.

Problem 2: Negative impact of the CET on third parties

ECOWAS is currently a free trade area. With the adoption of a common external tariff, it would become a full-fledged customs union. GATT Article XXIV.4 recognises that the purpose of a customs union should be to "facilitate trade between the constituent territories and not to raise barriers to the trade of other contracting parties with such territories." In a similar vein, Article XXIV.5a provides that in the case of the formation of a new customs union "duties and other regulations of commerce imposed [...] shall not, on the whole, be higher and more restrictive than the general incidence of the duties and regulations applicable in the constituent territories prior to formation of such a union." In other words, customs union participants should avoid causing prejudice to third parties (i.e. other WTO members) arising from the establishment of a new regional agreement that confers additional trade commercial benefits to its members. Hypothetically, at least, setting the regional common external tariff ceiling at 35 percent carries the risk of creating additional tariff obligations for third parties since some ECOWAS member states have bound WTO tariffs below that level.

Solution 1: Carry out an assessment of the general incidence of duties and other commercial regulations on the basis duties actually applied in case forming a customs union

Individually, each WTO member retains its margin trade policy space resulting from the difference between bound and applied tariffs. If West African countries leave the situation as it is and start implementing their customs union, they will fall under GATT Article XXVI.5 to the extent that the increase in customs duties enforceable against third parties would result directly from the creation of the union. As a consequence of the establishment of the new entity, the measure will be sanctioned by the negotiation of compensation. On the other hand, taken individually, nothing prevents countries in the region from increasing their applied tariffs to benefit from legal margins before the launch of the customs union. In this way, the higher duties are no longer the result of the establishment of the customs union, but a case of a WTO member country exercising the legal rights granted by the system. This would of course require a high level of regional consultation.

Solution 2: Changing the legal basis at the WTO

This solution is the simplest to carry out. All provisions linked to raising duties can be found in GATT Article XXIV. However, ECOWAS has already been notified to the WTO as a free trade area under the 1979 Enabling Clause. If, after the adoption of the common external tariff, the new customs union is notified to the WTO following the same procedure under the Enabling Clause rather than GATT Article XXIV, the impact of higher tariffs resulting from the creation of a customs union no longer applies. It would be wise to proceed in this direction.



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TRADE AND AGRICULTURE

Tapping into the agribusiness potential for Africa's prosperity

Philippe Scholtès

Despite considerable GDP growth over the past decade, much of Africa remains mired in poverty. This article explores how a shift from smallholder farming toward agro-processing could expand domestic markets and foreign trade, thus creating jobs and raising rural incomes throughout the continent.

The significance of agribusiness for wealth creation in Africa has been widely recognised in recent years. GDP growth alone, based chiefly on exports of oil, minerals and agricultural commodities with little or no processing involved, has not led to sustained poverty reduction. In order to accelerate sustainable growth and development, a rural transformation process is needed to raise the economic value of agricultural commodities and create off-farm employment opportunities for areas such as post-harvest processing, logistics, finance, marketing or quality management. Farming should be seen as a modern industry with distinctive scientific, technological and management inputs: the focus of development assistance must move beyond agriculture, towards agribusiness.

A changing global economic space

Robust economic progress since the turn of the millennium resulted from high commodity prices in resource-based economies, and is poised to continue over the foreseeable future. Across sub-Saharan Africa incomes per capita increased by a factor of 2.5 in the eight years to 2010, life expectancy at birth rose by four years, while 12 percent more children completed primary education^①.

Yet the region remains mired in poverty: home to 33 of the world's 48 least-developed countries, it highlights the limits of a commodity-driven growth path. Investment geared predominantly to oil and minerals brings about the 'resource curse' of currency overvaluation, weak linkages to the domestic economy, and the societal stresses associated with a skewed distribution of growth dividends. Meanwhile less than 40 percent of agricultural output is processed, although agro-processing makes for 70 percent of manufacturing value added and nearly half of all exports in most LDCs^②.

Today's shortfalls are tomorrow's opportunities. Adding value to agro-commodities can create jobs and raise rural incomes, as well as reduce post-harvest losses and price volatility, trigger growth in other sectors, and expand domestic markets and foreign trade. Together, these factors will contribute to improved food security.

Agribusiness for Africa's prosperity

The path to reap these benefits goes through a profound transformation of Africa's rural hinterland from a subsistence household economy to modern industry, and a shift of resources and functions from farm to firm.

In its 2011 publication *Agribusiness for Africa's Prosperity*^③, the UN Industrial Development Organization (UNIDO) argues for a holistic approach that effectively mobilises a country's productive potential and addresses preconditions for agribusiness growth by identifying the weakest links of the value chain from farm to market and the binding constraints for policy and investment.

The strategy rests on seven pillars: enhancing agricultural productivity; upgrading value chains; exploiting local, regional and international demand; strengthening technological efforts and innovation capabilities; promoting effective and innovative financing; stimulating private-sector participation; and improving infrastructure and access to energy.



Eight case-studies of African agribusiness value chains⁴ revealed that strategies are product-specific, while value chains are typically driven by buyers, concentrated around lead firms. No African company currently occupies a lead position, although some appear as second-tier suppliers in global chains. Local firms across the continent depend on global retailers and branded manufactures. Integrating value chains creates opportunities for smallholder farmers and increases their incomes by 10 to 100 percent across the research sample.

High commodity prices since 2007 brought along windfall profits to exporters, but caused havoc for consumers in food-importing countries. In this context, regional markets represent opportunities for local agribusinesses provided that tariff and non-tariff barriers are reduced. African countries must pursue their participation in preferential trade agreements and Economic Partnership Agreements: with South-North trade hampered by tariff escalation for semi-processed and processed goods in the OECD region, commerce with emerging countries can grow rapidly on the back of tariff reductions and dovetail China's resource priority with Africa's processing priority.

However, cross-border trade is impeded by weak physical infrastructure. The internal handling of goods in Africa takes 45 days on average compared to 29 days for Latin America and 13 days for OECD countries. Better air, rail, sea traffic and transportation corridors are required, as are improvements in road transport, border restrictions and information technology.

An enabling business climate is a prerequisite for nurturing private participation in agribusiness through a mix of created competitiveness and inherited comparative advantage; the promotion of private sector development through investment supported by public goods; increasing the efficiency and productivity of local enterprises; and encouraging entrepreneurship by removing legal, financial and structural constraints.

Finally, strong leadership and public governance are more than ever necessary to implement policies that promote openness, macroeconomic stability, high savings and investment rates, and market allocation of resources. Agribusiness policies in particular must encourage the liberalisation of trade and investment, research and extension services, market orientation, social inclusion and environmental sustainability. Such policies will address market failures, promote aid for trade, support public-private sector dialogue and cooperation, as well as coordination amongst actors in value chains, regional integration, exchanges of best practices and South-South cooperation.

Agribusiness needs to 'go beyond borders'

In a close partnership with the UN Food and Agriculture Organization and the International Fund for Agricultural Development, UNIDO has held a series of international consultations on agribusiness as a means of addressing food security and sustainable poverty reduction in low-income countries. The *African Agribusiness and Agro-industries Development Initiative*, or 3ADI, reckons that the expansion of the sector requires a convergence of independent initiatives from smallholder farmers to larger agribusinesses through processors, traders, providers of logistics, quality assurance, finance and insurance services, and the like. It also calls for more foreign investment and external trade.

Joint operations are now under way in a first batch of 12 countries – Afghanistan, Comoros, the Democratic Republic of Congo, Ghana, Haiti, Liberia, Madagascar, Nigeria, Rwanda, Sierra Leone, Sudan and Tanzania – where one or two key agricultural products are selected by the local authorities in line with national strategies. Each product forms the basis of a detailed value chain analysis that maps out all steps of economic activity, from resource to market.

Reviving the fortunes of white gold in Ghana

Launched in 1968 with the creation of the Cotton Board, the production of cotton in Ghana had declined steadily since the turn of the millennium. By 2010, output had virtually ground to a halt under the combined influence of unfavourable world prices and structural weaknesses. National authorities now consider that the revival of the cotton industry is key to poverty reduction in the poorer, northern region of the country. Attracted by international prices then at a historical peak, and inspired by the success of nearby Burkina Faso's cotton sector, they divided the production region into three zones and enlisted the support of large agribusiness companies to raise the surface under cultivation from a low 5,000 hectares to a first target of 50,000 hectares.

A joint World Bank-IFC-UNIDO mission visited the country in early 2011 and recommended a comprehensive array of interventions to expand the value chain, from soil preparation through irrigation and mechanisation; organisation of farmers' communities and the delivery of extension services; reform of the public role in the industry; regulations and a price-setting mechanism acceptable to all stakeholders; quality management and the grading of seed cotton and lint.

The revival of the cotton sector will create jobs and rural incomes; it will also strengthen the country's position in foreign trade in two distinct ways: on the input side, Ghana will save considerable time and costs by building on neighbouring Burkina Faso's advances in seed improvement and management. On the output side, the production increase will feed into the growing demand of processors in China, South Asia, Turkey or Egypt.

Linking smallholder farmers to larger agribusiness

In a typical agribusiness value chain, raw materials and other inputs flow from pre-production to processing and on to end markets. A coordinated mobilisation of resources is required to improve the productivity of resource endowments and production factors – land, labour and technology. This involves enhancing skills and know-how in areas such as management and marketing; capital through finance and investment; knowledge and adoption of quality control and food safety measures, new and adapted technologies such as processing machinery, land preparation equipment, irrigation technology, and inputs adapted to changing environments (e.g. drought-resistant seeds, fertilisers).

Most of these resources are now held by the private sector. Private investment flows (both domestic and foreign) in sub-Saharan Africa have been on a steady rise over the past decade; in 2008, private fixed investment represented more than three times the volume of official development assistance.

Several funds have been established in response to a fast-growing interest of private investors in the potential of agribusiness in the developing world and in low-income countries across Africa in particular. They offer a range of structured products from debt to equity, catering to varying risk appetite of investors, as well as a diverse market from smallholder farming enterprises to large agribusinesses.

Services to agribusiness investors at pre-investment stage include developing pipelines for private finance; sharing basic information on agriculture, agribusiness and value chains; organising workshops for SMEs on innovative sources of finance; promoting linkages between private finance and development projects in general and, most importantly, exploring synergies between private finance and public investment projects by introducing private investment projects to government officials or donors, and documenting the potential impact of a public investment on the expansion of a value chain.

At post-investment stage, development assistance will reduce transactions costs for agribusiness investors while supporting smallholder farmers by organising the supply side in rural communities; developing wherever warranted out-grower schemes; building processing capabilities in rural SMEs; improving the productivity, quality and consistency of their output; or facilitating the management of supply chains through the introduction of traceability mechanisms.

Conclusion

Substantial and well-coordinated financing, as well as other resources, will be necessary to steer African agriculture to a more productive and efficient path. Among the main actors in this transformation are farmers and traders; suppliers of fertilisers, pesticides and seeds; rural energy service companies; transporters and processors; and providers of technology or rural finance. At the end of the chain, domestic and foreign buyers must be guided by strong and coordinated signals in the form of clear and predictable public policies, as well as adequate physical and institutional infrastructure. This is where national governments, development finance institutions and public aid agencies can best target their efforts. .

❶ Source: World Bank on-line datasets.

❷ Source: UNIDO industrial statistics

❸ Kande K. Yumkella, Patrick M. Kormawa, Torben M. Roepstorff and Anthony M. Hawkins, Eds, UNIDO (2011)

❹ In Cameroon, Ethiopia, Kenya, Mali, Nigeria, Senegal, South Africa and Zambia. Reference: Karl Wohlmuth, Patrick M. Kormawa and Jean Devlin: Agribusiness for Africa's Prosperity: Country Case-Studies, Working Paper, UNIDO, September 2011



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TRADE AND SUSTAINABLE DEVELOPMENT

Sustainable development implications of South Africa's 'rhino wars'

Sanaz Sohrabian

A spike in demand for rhinoceros horn is decimating populations in South Africa. At stake is not only the survival of the species, but the many sustainable development opportunities afforded by ecotourism.

Together with lions, leopards, elephants and Cape buffalos, rhinoceros are one of Africa's 'big five' wildlife tourist attractions. In South Africa – home to more 80 percent of the continent's rhino population – wildlife tourism and the safari industry represent an invaluable source of revenue for marginalised rural communities where few other employment opportunities exist. All this is under threat from skyrocketing poaching.

Between 2010 and mid-October 2012, a staggering 1,236 rhinos were poached in South Africa and 604 poachers were arrested. According to the latest figures released by Pretoria, 455 rhinos have been lost to illegal killings since the beginning of this year. This tally has already eclipsed the 448 incidents reported last year. Kruger National Park – the country's largest and best known game reserve – has been hit hardest, with a loss of 272 rhinos since January. The increased number of rhino deaths not only jeopardises conservation efforts in South Africa, it also poses challenges to sustainable development in the entire region.

Supply and demand

Rhino horn is prized in Eastern traditional medicine, particularly in China and Vietnam. According to wildlife trade experts, a rumour that rhino horn had cured cancer in a high ranking Vietnamese government official sparked off the recent surge in demand for rhino horn in Asia. The rumour eventually made its way to China, rejuvenating an interest in the horns, which had until recently been primarily used in traditional medicine. Since then, poaching gangs have organised themselves in a sophisticated manner, igniting a clash – dubbed Africa's 'rhino wars' – between poachers and conservationists.

Pretoria recognises the explicit threats poaching has on the country's economy and environment and is taking a strong stance against illegal hunters. The South African Department of Environmental Affairs has received nearly US\$3 million from the Washington-based Global Environment Facility, aimed at strengthening the country's ability to fight wildlife crimes. South Africa says it hopes to enhance its enforcement capacity through forensic-based technologies.

Ecotourism impacts

Employment generated by ecotourism has been recognised as particularly beneficial to indigenous peoples' employment opportunities, and the growth of local businesses is connected to increasing numbers of tourists. According to the findings of the Collaborative Partnership on Forests, benefits generated by ecotourism to local businesses are higher than those from mass tourism. This provides incentives to local communities to protect their environment.

These spin-off benefits are now in jeopardy. The recent drop in numbers of black rhinos due to poaching has caused a spike in the value of their horns which, in turn, is stimulating the black market. The growing importance of this market is an imminent threat to ecotourism industry not only because of dropping numbers, but also due to the massive security costs associated with protecting private game reserves.

Regulating rhino trade remains controversial

For the last 36 years, the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) has been tasked with regulating trade in species under threat – or potential threat – of extinction. Rhinos are included in Appendix I, which contains the most endangered species among CITES-listed animals and plants. The convention prohibits international trade in specimens of these species except when the purpose of the import is non-commercial, such as scientific research.

Elephant and rhinoceros conservation sparked fierce debate during the July 2012 meeting of the Standing Committee of CITES. Delegates ramped up pressure on countries that either fail to sufficiently address illegal wildlife trade in their legislation or to report on such trade. Vietnam – a country with high demand for rhino horn – was requested report on the measures it will implement to prevent illegal import and trade in rhino horn, how the black market for such trade is targeted in the country, and what Hanoi is doing to discourage the use of rhino horn.

According to the conservation group Saving Rhinos, a 'freshly cut' rhino horn commands a retail price of USD\$25,000 - \$40,000 per kg on the Vietnamese market.

Delegates highlighted the complexity of the rhino black market, which involves poachers, local receivers, national buyers, national exporters and receivers in consumer countries. They also criticised the shortcomings of current domestic laws and their inability to effectively regulate the market.

Uncertain future

Next year, as Bangkok will host the 16th CITES Conference of the Parties (COP16), countries will vote on a proposal to create a centralised ivory sales body, the Central Ivory Selling Organisation, which would legalise the sale of ivory from elephants that die naturally.

In a move aimed at reducing black market trading and poaching, Pretoria had been expected to submit a proposal along similar lines for limited trade in lawfully obtained rhinoceros horn for consideration at COP16. To the disappointment of advocates for this approach, South Africa decided to defer its submission until 2016 due to the number of obstacles that would need to be addressed. Those opposing the scheme argue that legalising rhino horn trade would not change the fundamental economics behind poaching. Despite the lack of a formal proposal on this issue, heated discussions may be expected in Bangkok.

This article is adapted from a longer version originally published in the August 2012 issue of ICTSD's BioRes Review.



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Regional Update

East African EPA within reach by end-2012

EAC Secretary-General Richard Sezibera is confident the East African Community and the European Union can conclude their Economic Partnership Agreement negotiations by the year's end. "We have come a long way," he remarked after meetings with EU officials in September, noting that several key issues had been agreed upon. The EAC region has the political will to get the deal done, he said, adding that the bloc would negotiate as a single entity.

Mr Sezibera is seeking an increase in the EAC-EU partnership fund, as well as European support for the implementation of the region's industrialisation and energy policies, including renewable energy initiatives. Just 10 percent of East Africans are currently connected to the electricity grid.

At the regional level, infrastructure remains the major stumbling block to East African integration. The first priority is to improve the road network within the bloc, and then turn the focus to rail, which currently accounts for a mere 3 percent of the goods transported in the region.

Read the full story at <http://bit.ly/T8niCM>

SADC free trade area to launch this year

An agreement to lower barriers to trade and improve cross-border commerce in the Southern African Development Community (SADC) should be implemented this year, according to South Africa's Trade and Industry Minister Rob Davies, with nearly all tariff lines traded duty-free. The market would involve 26 countries with a population of 600 million and a combined GDP of US\$1 trillion, "providing the market scale that could launch a sizeable part of the continent onto a new developmental trajectory." The agreement would also form the basis for a continent-wide FTA that would help overcome the challenges of small and fragmented economies.

Read more at <http://bit.ly/QmAhdQ>

New roadmap for promoting agricultural trade in Africa

The African Green Revolution Forum [Click here](#), held in Arusha (Tanzania) in late September, brought together African heads of state, ministers, farmers, private agribusiness firms, financial institutions, civil society and scientists to discuss the right way to scale up investments and innovation for sustainable agricultural growth and food security.

The AGRF action areas focused on four major themes: rethinking public-private partnerships; revolutionising agricultural finance; making markets work; and building the foundations for rapid growth in agricultural productivity. Examples of the specific actions that were collectively decided include:

- Developing structures that incentivise financial institutions to lend/invest in agriculture, especially in poor, socially-excluded smallholder farmers; as well as effective models for interaction and coordination between the various players in the financial system.
- Regionalising commodity trade and harmonising trade regimes; as well as removing trade barriers across countries and sharing knowledge and market information across borders.
- Encouraging regional economic communities to develop plans that address the bottlenecks that inhibit regional markets from working effectively, such as infrastructure, transport and corruption.
- Calling on the private sector and parliamentarians from African countries to work together in a non-partisan way to accelerate government investment in agriculture and introduce policy and regulations that motivate the private sector to invest in agriculture.

Read full story at <http://bit.ly/T8nn9I>.

Stop the global land rush: World Bank should freeze investments

A recent Oxfam International briefing note, entitled *Our Land, Our Lives*, highlights the need to address land-grabs in poor countries. Africa has borne the brunt of this trend, with an area the size of the Kenya sold off in the past decade. The land acquired by investors globally could feed a billion people, equivalent to the number of people who go to bed hungry each night.

According to Oxfam, "with food prices spiking for the third time in four years, interest in land could accelerate again as rich countries try to secure their food supplies and investors see land as a good long-term bet. All too often, forced evictions of poor farmers are a consequence of these rapidly increasing land deals in developing countries.

As the world's leading standard-setter and a big investor itself, the World Bank should freeze its own land investments and review its policy and practice to prevent land-grabbing. In the past the Bank has chosen to freeze lending when poor standards have caused dispossession and suffering. It needs to do so again, in order to play a key role in stopping the global land rush."

Oxfam backs greater investment in agriculture and increased support to small-scale food producers, but cautions that very few of the recent land investments have benefited local people or helped fight hunger. While two-thirds of these deals by foreign investors are in countries with a serious hunger problem, precious little of this land is being used to feed people in those countries. Instead, the land is either left idle while speculators wait for its value to increase and then sell it at a profit, or it is predominantly used to grow export crops, often for use as biofuels. About two-thirds of foreign investors in developing countries intend to export everything they produce on the land.

Read the full report at <http://bit.ly/TYKhju>.

Africa's digital divide closing, but still significant

TA new UN report shows that the 'digital divide' is closing as a steady fall in worldwide costs of telephone and broadband Internet services has enabled a number of developing countries to expand their access to information and communication technology (ICT).

According to *Measuring the Information Society 2012*, released by the International Telecommunication Union (ITU) on 11 October, developing countries now account for the 'lion's share' of market growth in the mobile sector, where broadband services growth reached 78 percent compared to 40 percent globally in 2011. Similarly, global exports of ICT goods to developing countries accounted for 20 percent of their merchandise trade in 2010, compared to 12 percent worldwide.

The report also identifies countries that have made the most progress when it comes to ICT development. These markets are mostly located in the developing world, with three African countries – Ghana, Kenya and Rwanda – ranked among the top ten 'strong performers'.

Nevertheless, the digital divide – generally defined as the difference in levels of ICT access between developed and developing countries – remains significant, with developed countries' average connectivity values at twice the level of their developing counterparts. The ITU called on policy-makers to pay 'keen attention' to the plight of a group of so-called 'least-connected countries'.

The agency also noted that fixed broadband services remain too expensive in most developing countries, where a basic monthly package represented more than 40 percent of monthly gross national income per capita at the end of 2011, compared to 1.7 per cent in developed economies.

Read the full report at <http://bit.ly/R2Jegd>.

Global news

Services liberalisation talks move forward

Forty-six WTO members exploring the possibility of a new plurilateral services liberalisation agreement have made progress on a potential format for such a deal. While the talks are still in the early stages, many delegates hope that formal negotiations for the proposed pact might begin as early as next year.

Following meetings during the first week of October, participating members tentatively decided that a possible services liberalisation deal would use the 'core articles' of the WTO's General Agreement on Trade in Services, or GATS, with discussions now centring on which core provisions to incorporate into the deal and how.

The new treaty could potentially use a positive list on market access concessions, and a horizontal – or all sectors – commitment on national treatment, with the possibility of some exceptions, a developed country official familiar with the talks told Bridges. However, another official stressed, a 'hybrid' approach is just one of the options on the table, and has not yet been officially agreed.

Under a positive list, members make specific commitments on the sectors they agree to liberalise; under a negative list, all areas not specifically excluded are considered liberalised. Participants in the negotiations – representing 70 percent of global GDP and services trade – have been exploring ways that would allow for new countries to sign on to the proposed pact.

The possibility of a new services agreement has elicited much scepticism from emerging economies, including Brazil, China and India, due to their systemic concerns over WTO members pursuing this initiative plurilaterally. While some countries have informally said that they are watching the talks 'with interest', they have given no indications of whether or not they might consider joining the discussions at a later stage.

Members currently involved in the services initiative include Australia, Canada, Chile, Chinese Taipei, Colombia, Costa Rica, the EU, Hong Kong, Israel, Japan, Mexico, New Zealand, Norway, Panama, Pakistan, Peru, South Korea, Switzerland, Turkey and the US.

Read the full story at <http://bit.ly/RwWfiy>

Signs of momentum in Doha talks

Nearly a year after last December's ministerial conference, signs are emerging that WTO members could soon be reviving their efforts in moving the Doha Round talks forward, after the negotiations were formally declared at an impasse last year.

Discussions with ministers, delegates, negotiators and the private sector have confirmed a "collective desire to re-engage," WTO Director-General Pascal Lamy told members at a meeting of the General Council on 3 October. He added, however, that the factors that had shaped the impasse had not changed substantively, "nor do I harbour any dream about achieving grand designs or comprehensive deals."

Over the last several months, members had been reviewing whether an agreement on trade facilitation could be put forward as an early Doha deliverable. At present, there is no consensus on whether such a deal could stand by itself, or whether it would need to be balanced by another deliverable from a different negotiating area, such as agriculture, special and differential treatment, or a 'non-Doha' issue such as the expansion of the Information Technology Agreement.

Even with widespread acknowledgment that trade facilitation could be an achievable outcome, some members did express concern over potential problems such a deal might raise. Barbados, speaking on behalf of the Small and Vulnerable Economies (SVEs) noted that trade facilitation, while having the potential to make trade more efficient, could also worsen the balance of trade of import-relying countries. Lesotho, speaking on behalf of the African Group, also cautioned that a trade facilitation deal might not necessarily be a win-win outcome.

Read full story at <http://bit.ly/PQY3PX>

FAO lowers hunger estimate

A revised estimate of the number of hungry people in the world, released on 9 October, classifies 870 million as undernourished between 2010 and 2012. Missing from the UN Food and Agriculture Organization's figures was any reference to the one billion mark that the agency had claimed was reached in 2009 due to high food prices and the economic crisis. The new report cites a change in methodology and improved data as reasons for the shift.

The FAO now says that the revised figures, part of the annual State of Food Insecurity Report (SOFI), do not capture the impact of short-term price spikes or depressions and are not comparable to previous editions. Despite this change, the agency still believes that high food prices continue to be a worrying element in ensuring food security for the most vulnerable, since they spend the greatest share of their income on food.

Finding that there are 132 million fewer people hungry in 2010-12 than 1990-92, the report insists that the Millennium Development Goal of halving the prevalence of hunger in developing countries by 2015 is within reach if the trend continues.

SOFI cautions that growth in the agricultural sector is not sufficient to improve food security if policies fail to focus on crops grown widely by smallholders or those vulnerable to hunger. It cites Tanzania as a particular case where export-oriented cash crops, such as cotton and tobacco, received government research and extension support instead of assistance that is more directly tied to undernourishment – maize, root crops, pulses, and oilseeds.

Africa was the only region where the number of hungry grew over the period, from 175 million to 239 million, with nearly 20 million added in the past four years. The prevalence of hunger, although reduced over the entire period, has risen slightly over the past three years, from 22.6 percent to 22.9 percent. In sub-Saharan Africa, the modest progress achieved in recent years up to 2007 was reversed, with hunger rising 2 percent per year since then.

For more information go to <http://bit.ly/RVOhQg>

TPP membership expands despite criticism

Canada and Mexico have joined the Trans-Pacific Partnership (TPP) negotiations, which aim to create a free-trade zone with a combined population of 658 million and a gross domestic product of US\$20.9, accounting for 26 percent of global GDP. The other nine participants are Australia, Brunei Darussalam, Chile, Malaysia, New Zealand, Peru, Singapore, the United States and Vietnam. Business associations strongly back the endeavour.

Rather than traditional market access issues such as tariffs, the focus of the TPP – billed as a state-of-the-art 21st century trade agreement – is on the enforcement of existing commitments and ensuring that regulations do not act as barriers to trade.

The projected pact is controversial for a number of reasons, including tough provisions on intellectual property rights (patents and copyrights in particular) and the secrecy surrounding the negotiations. None of the negotiating texts have been released publicly, but some provisions in leaked chapters have raised alarm.

In August, the Green Parties of Australia, Canada and New Zealand issued a joint statement criticising the TPP, which, they said, had been "negotiated behind closed doors with a level of secrecy that is completely unacceptable in a democratic society." The signatories also warned that provisions in leaked negotiating drafts "could hinder access to safe, affordable medicines, weaken local content rules for media, stifle high-tech innovation, and even restrict the ability of future governments to legislate for the good of public health and the environment." The US Green Party signed the statement on 1 October.

One of the most controversial elements of the new treaty is a NAFTA-like 'investor-state' provision under which companies would be able to sue governments if their parliaments or local councils adopt legislation that reduces their profits or adversely affect their businesses. Should a government lose such a dispute, it could, for instance, be forced to repeal laws that require graphic warnings/plain packaging for cigarettes, or mandatory GMO labelling for foodstuffs and drinks.

The TPP talks are expected to conclude towards the end of next year.

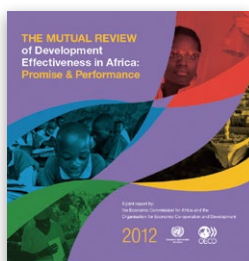
Publications and resources



Economic development in Africa: Structural transformation and sustainable development in Africa – United Nations Conference on Trade and Development – June 2012

The main message of this report is that achieving sustainable development in Africa requires deliberate, concerted and proactive measures to promote structural transformation and the relative decoupling of natural resource use and environmental impact from the growth process. It argues that green industrial development must lie at the heart of this transformation, complemented by policies designed to increase access to energy, in particular sustainable energy, and by policies fostering a green agricultural revolution based on a sustainable intensification of agricultural production.

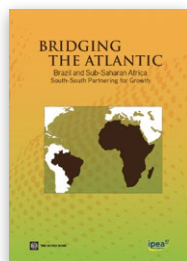
For full report, see <http://bit.ly/POZdhJ>



The mutual review of development effectiveness in Africa: Promise and performance –UN Economic Commission for Africa and the Organisation for Economic Co-operation and Development – September 2012

This report assesses what has been done by Africa and its development partners to deliver on development commitments, the results achieved and key priorities for the future. The report is divided into four main 'clusters' of issues: sustainable economic growth, investing in people, good governance and financing for development.

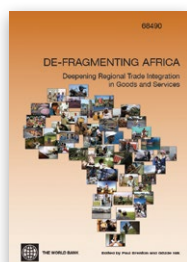
For full report, see <http://bit.ly/RvxDEn>



Bridging the Atlantic: Brazil and Sub-Saharan Africa, South-South partnering for growth – The World Bank and IPEA – 2012

Bridging the Atlantic is a descriptive study about Brazil's involvement with counterparts in Sub-Saharan Africa over the last decade through knowledge exchange, trade and investment. The objective of the study is to better understand these relations with the aim of forging concrete and mutually beneficial partnerships between Brazil and Sub-Saharan Africa.

For full report, see <http://bit.ly/sytZM7>



De-fragmenting Africa: Deepening regional trade integration in goods and services – The World Bank – 2012

This is an analytical work on regional trade integration in Africa, bringing together a collection of papers that look at the nature and impact of barriers to trade within the continent. The contributions draw attention to a wide range of constraints, distortions and abuses.

For full report, see <http://bit.ly/Vmfjhj>



A review of trade preference schemes for the world's poorest countries – ICTSD – October 2012

In this study, Sam Laird – former senior economist with UNCTAD, the World Bank and the WTO – analyses the implementation of the preferential trade schemes of seven major markets, including Canada, China, the European Union, India, Japan, Korea, and the United States. The paper also simulates the impacts on LDCs' exports of (a) extending full duty- and quota-free market access to them, and (b) concluding the non-agricultural market access negotiations in the WTO's Doha Round.

For full report, see <http://bit.ly/VoOT05>

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