

From Aid to Trade:

Transforming Japan-Sub-Saharan Africa Relations



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Kento Ono, Nicolas Valladolid, Raphaela Douglas



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**FROM AID TO TRADE:
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AFRICA RELATIONS**

**Kento Ono, Nicolas Valladolid,
Raphaela Douglas**

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75014 Paris, France
info@andaluscommittee.com

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Authors:

Kento Ono, Nicolas Valladolid, Raphaela Douglas

Editors:

Pranav Harish, Luca Utterwulghe

Design:

Kate Huang

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Executive Summary

Sub-Saharan Africa presents key opportunities for Japan. This report finds that, historically, Japanese assistance to Africa has been limited, whereas political involvement has been broad. Important cooperation avenues remain untapped, and Japan can leverage its diplomatic, humanitarian, and economic capabilities to assist Sub-Saharan African development. This report recommends three actions for Japan.

- 1. **Strengthen multilateral ties.** Strong continental endorsement is lacking. Japan must position itself as a key regional partner to allow for broader cooperation and increased diplomatic engagement via investment and bilateral ties.*
- 2. **Develop key infrastructure.** Transportation remains a challenge for African economic integration. Japan, with its technological prowess, can assist in developing intra-African high-speed rail networks. Such projects would boost African development and have economic and diplomatic benefits for Japan, including manufacturing demand.*
- 3. **Create differentiated conditionality regimes.** African nations prefer less conditional aid. In a saturated African cooperation environment, with multiple external powers involved, Japan must create unique, agreeable conditionality regimes that align with African nations' and Japan's international values.*

Gaps, Challenges, and Interests

Following the waves of decolonization in Sub-Saharan Africa, Japan lacked strong incentives to deepen regional partnerships. By 1970, Japanese official development assistance to Africa averaged less than 2% of Japan's total foreign aid, with the majority going to other Asian nations. After the 1973 oil shocks, Japan began to engage more with the continent to find viable alternative oil suppliers. In the 1980s, as its housing bubble enlarged, Japan found itself contributing the largest share of global assistance, with Africa making up 10.9% of Japan's global contributions (Keiichi, 2024).

Japan began contributing more aid to Africa in 1990 to support its permanent Security Council membership claim. Japan sought niche aid strategies to lead in new African development. It increased official visits and recognized the importance of strong African diplomatic relations. Japan founded the Tokyo International Conference for African Development in 1993, which has become the cornerstone of Japanese-African diplomacy.

Conference meetings between Japan and Sub-Saharan Africa have continued since the 2000s, with the most recent eighth conference held in August 2022 and the ninth planned for 2025. These forums have set mutual goals, such as promoting Japanese private investment in Africa at the fifth conference in

2013. Japanese Prime Minister, Shinzo Abe's 'TICAD VI Nairobi Declaration' envisioned an Africa governed by rules-based order, free markets, and a secure maritime order at the sixth conference in 2016.

Japanese aid increased 180% from 2000 to 2010 but stagnated from 2010 to 2022 (Keiichi, 2024). Despite stagnant aid, Japanese investment in Africa surged from \$3 billion in 2020 to \$7.5 billion in 2021, primarily driven by private sector investments. For instance, Mitsui is a major investor in Kenya, Mozambique, and South Africa. Though significant, Africa's share of Japan's development assistance remains the smallest after Oceania, presenting growth opportunities. Investment remains Japan's sole substantial material engagement with Africa.

External powers like China, India, and the United States have increasingly involved themselves in Africa since the 1990s. China's AIIB lends loans to African countries tied to the Yuan, while China's Belt and Road Initiative extends Chinese links to Africa through infrastructure development, transport networks, and trade linkages. In response to growing Chinese influence, the US has sought to increase involvement in Sub-Saharan Africa through the 2018 BUILD Act, which provides infrastructure and development aid. China and the US provide most of the aid and investment in Africa.

Japan has a history of involvement in the Global South. After the 1970s-80s debt crises, Japan leveraged its high growth and private savings to become the key lender in resolving these crises (Thorp, 1998). Despite Japan's current economic struggles, Japanese banks remain strong, representing opportunities for future involvement in Africa.

Interests for Sub-Saharan Africa

a. Development

African nations' development history is complex. During the Cold War, many African states, influenced by foreign powers and colonial infrastructure, heavily relied on commodities for state revenues (Broadberry & Gardner, 2021).

African states, structurally vulnerable, faced state-building challenges, hindering development. Leaders struggled to establish legitimacy and implement objectives, leading to prolonged political instability marked by authoritarian rule, interstate conflict, coups, and civil wars (Krause, 1998).

Despite the trends, Africa remained focused on development. Rwanda developed strong industrial and technology industries, becoming a regional leader. Nigeria and Kenya leveraged commodity industries to build international shipping capabilities, turning Lagos and Mombasa into major ports. However, Africa continues to lag the world[MOU1] on most development metrics, providing an opportunity for advanced nations like Japan to collaborate on mutually beneficial initiatives.

b. Non-intervention

Colonial powers have historically been deeply involved in African politics. During the Cold War, the USSR and the US supported governments and coups in Africa. Notably, Western governments supported apartheid South Africa, while the USSR supported Angola. US-affiliated actors have supported recent coups in Burkina Faso (2014, 2015, 2022), Niger (2023), and more.

African nations, historically wary of Western involvement, predominantly prefer Western non-intervention. After repeated French military interventions, Chad and Senegal demanded an end to French military presence in 2024 presenting increasing opposition to Western involvement.

Interests for Japan

Despite very strong growth from the 1970s-90s, Japan's economy has stagnated, experiencing a dangerous deflationary cycle which is further complicated by an aging and shrinking workforce. For the past 20 years, every Japanese prime minister has tried and failed to revive strong Japanese growth. Recent developments such as the August 2024 Asian stock market shock have added renewed urgency to Japan's economic issues (Panagiotis Tsigaris et al., 2024). Japan retains competitive industries such as transportation, skilled manufacturing, finance, and electronics along with strong savings rates making commercial lending more feasible (Iwatani & Ravisconi, 2024). Africa presents Japan with strong economic opportunities through commodities and destinations of capital.

Challenges of Japan-Africa Cooperation for Sub-Saharan Africa

a. Political Risk

Africa's history of political turmoil and economic mismanagement has led to high political risk perceptions. Historical economic mismanagement destabilized bond markets and expropriated investors, causing sovereign debt crises in the 1980s due to contagion effects from Latin America. Despite these

challenges, countries have continued to lend to Africa. After the 1980s, the US provided billions in aid through the Brady Plan to help countries restructure debts and recapitalize. Lending to Africa declined in the 1990s to early 2000s but has since risen sharply into the early 2020s, driven by increased confidence in African economies and new geopolitical incentives.

b. Extraction and Infrastructure

Colonial extraction in Africa created infrastructure that only facilitated export to colonial metropolises, hindering intra-African trade. Most railroads extend only to ports, not across national borders. While African infrastructure development has accelerated, road and railroad density remain low. Investments have focused on large megaprojects, but more attention should be given to smaller projects that can boost intra-African trade (Pádraig Risteard Carmody, 2011). African nations, rich in natural resources, must utilize these resources to gain crucial funding for critical industries like skilled manufacturing and technology. Strong infrastructure is key to sustaining this revenue and increasing access to regional markets as other industries develop. While the African Union formed the 2018 African Continental Free Trade Area (AfCFTA), poor transportation infrastructure remains the key barrier.

Challenges of Japan-Africa Cooperation for Japan

a. Competition

Cooperation with Africa is becoming more popular internationally. Countries such as the US, India, and China are pumping billions of dollars into Africa. Diplomatically, these blocs seek stronger ties with the African Union. However, competition among involved countries is difficult as most countries are established regional partners. While Japanese influence is not zero-sum, building strong rapport quickly and capturing significant market share will be challenging. Therefore, finding cooperation and investment niches is crucial to improving Japan's reputation in Africa.

b. Fiscal and Monetary Constraints

Japan's current economic issues and the yen's instability limit its involvement in the African continent. Massive spending abroad is unlikely, as the state's current strategy is to induce inflation domestically. Given the yen's volatility, Japanese non-yen sovereign lending to Africa is unlikely (Luo et al., 2024). Lending in foreign currencies would force Japan to tie up foreign currency reserves in the short term, which decreases their potential to control yen exchange rates. While yen-denominated investments are possible, they contradict Japan's current fiscal and monetary posture. Yen-dominated sovereign loans may also be unagreeable to African countries, who view currency and debt volatility as destabilizing. To address these concerns, future Japanese investment in Africa should lead to short-term spending in Japan.

c. The Liberal International Order

Oftentimes, cooperation, aid, and investment are made contingent on recipient countries adhering to liberal international values. Common conditions are democratization, human rights, and trade liberalization. African countries are usually wary of these conditions, given their intrusiveness in domestic politics and development initiatives. Thus, more countries have turned towards Chinese investment, given their lower conditionality (Chido Munyati, 2024). Japan's explicit alignment with liberal values might limit its ability to compete due to potential strings attached (Nakano, 2023).

Cooperation Avenues

a. Political Cooperation

Japan has been actively engaging to secure strong diplomatic ties with Africa, with the first TICAD in 1993 marking the start of increased diplomatic activity in the region. From Yoshio Mori in 2001 becoming the first prime minister to visit Africa, to Prime Minister Fumio Kishida's tour in 2023, diplomats have increasingly visited with the aim of positioning themselves as a strong partner.

A key avenue in Japan's political cooperation with African countries concerns a mutual interest in the United Nations. In Japan's bid to gain a permanent seat on the United Nations Security Council (UNSC), the government felt it necessary to emphasize Japan's international contributions. In addition to economic support, development assistance, involvement in peacekeeping operations in Mozambique (1993), and the high-level Japanese visits were important to securing the regional trust. The

conference was a result of this diplomatic approach, with the idea initially being proposed by the Permanent Mission of Japan to the UN. From an SSA perspective, Japan's ambitions for a permanent seat align with the 'Ezulwini Consensus', a proposal for the representation of Africa in the UNSC. While the practical realization of these proposals remains a challenge, the shared vision and mutual interest in addressing regional underrepresentation and increasing involvement with the UN can serve as a valuable basis for continued diplomatic cooperation between Africa and Japan.

Africans cite resolving political corruption as a top three political priority. African countries consistently receive the lowest scores on the Corruption Perceptions Index, averaging 32/100 in 2022. The UN estimates an annual loss of over US\$50 billion through illicit financial outflows. Japan can address these issues by positioning itself as a democratic partner, differentiating itself from China's approach. This is emphasized by the actions Japan has taken to assist African countries with the consolidation of democracy. During the period following TICAD 8 in 2023, Japan provided capacity-building programs to over 3,000 people, strengthening governance in the judicial and administrative sectors and addressing anti-corruption measures. Through these efforts, Japan demonstrated its commitment to fostering political stability in SSA. By addressing corruption, Japan positions itself as a reliable partner, promoting cooperation with the region.

b. Social Development and Humanitarian Partnerships

As Japan seeks to reform its foreign policy stance toward Africa from "Reactive" to "Principled", fundamental assistance for African development becomes increasingly important. As announced at in the 2022 TICAD conference, Japan granted over US\$30 billion in public and private funds to Africa, strengthening stability. Japan's stance on support through humanitarian partnerships was echoed by a pledge to offer workforce training to 300,000 African nationals, utilizing Japan's strengths in the manufacturing and service sector.

c. Healthcare

Healthcare remains one of the largest issues in SSA, with healthcare systems in the region consistently being rated amongst the poorest in the world. One key difficulty in improving the quality of healthcare remains the lack of access to adequate human resources. The World Health Organization (WHO) estimates a shortage of 6.1 million healthcare workers (HCWs) in SSA (262, 2024). Despite these conditions, Sub-Saharan Africans do not consider healthcare a primary concern, instead citing unemployment, agriculture, and corruption as more immediate priorities (Huber, 2015).

In 2022, 255,000 students graduated from healthcare institutions across SSA according to the WHO (Health Workforce (Health Workforce (HWF), 2024). Raising quality, as well as quantity, of graduating students can be a solution to mitigating healthcare issues. Japan has been investing in healthcare projects across SSA, prioritizing reforming

HCW training and education. For instance, the “International Parasite Control Project” was established in Kenya in 2002, contributing to eliminating major parasitic diseases such as malaria, and developing human resource and information networks in SSA for parasite control.

Japan is a pioneer of digital healthcare (World Health Organization, 2022). By supplying healthcare technology to SSA, such as wearable devices and digital AI consultations, diagnostics and preventative treatment become more accessible. Furthermore, Japan’s digital health data platforms can support SSA governments in collecting and analyzing data to target interventions effectively. This, in turn, can speed-up responses in the outbreaks of disease. Information may also be used in educational efforts, identifying quickly which groups are at risk of disease, and communicating effectively how one can respond to the crisis.

d. Education

A further key cooperation avenue for Japan is the expansion of quality education in SSA. According to the World Bank, in 2023, nearly 90% of children in SSA are unable to read by the age of 10 (Kwakwa, 2023). The above-stated underlying issues with a subpar healthcare system are severely impacting children’s abilities to attend school.

Education is also at the core of developing SSA’s healthcare infrastructure. Japan has created e-learning platforms that can be accessed remotely. By helping to develop the healthcare infrastructure in SSA, Japanese aid can have a long-standing positive impact.

e. Nutrition and Food Security

Food security and nutrition are key in protecting and encouraging the development of SSA countries. Recent crises, such as the conflict in South Sudan and the widespread ramifications of the Russia-Ukraine war, have had detrimental impacts on food security and nutrition in SSA (Otorokpa et al., 2024). Japan has a history of spearheading aid in this domain. However, to develop a long-term partnership with SSA, Japan could develop agriculture parks and technology transfer centers, where Japanese machinery can be assembled, and agricultural education can take place. Both local and Japanese stakeholders stand to benefit in the long term through new partnership streams and contracts. Furthermore, combining food security and education will have profound impacts on SSA populations. Alongside aid in times of crisis, Japan should increase funding to local universities and colleges specializing in Agri-Tech. Japan already leads this sector, with key initiatives like TICAD, CARD, and IFNA.

f. Transportation, Trade, and Investment

Along with high growth, Japan developed strong infrastructure. Japan opened the first Shinkansen, high speed rail (HSR) line, in 1964. Since then, Japan has been a global leader in rail transport technology, exporting Shinkansen to India and the US. Despite increased Chinese rail competition, Japan still retains the most cutting-edge HSR technology. For Japan to become internationally competitive, transportation assistance must be combined with financial and multilateral ties.

Africa lacks robust rail infrastructure for intra-African trade. The African Union's Agenda 63 proposes building an African HSR network; however, tracks are yet to be laid. Japan's involvement would align with Africa's development vision, providing a key avenue for cooperation.

Investment and lending: Japanese firms will immediately benefit from increased demand for Shinkansen-related goods, such as electronics and industrial metals. African nations will also experience a significant boost in labor and manufacturing, leading to higher incomes, and contributing to national incomes and expertise. Japan can leverage high commercial bank savings to finance projects, especially in Africa, where lending is still risky. However, Japan can offer relatively low-interest loans (~3%) to reduce long-term risks (Otorokpa et al., 2024). If Japan can tie loans to yen, it could strategically structure repayments to impact yen exchange rates and aid Japanese monetary policy. Amidst competition with the US and China, Japan must position itself as a trustworthy financing partner with beneficial and differentiated terms.

Trade Integration: African HSR would be key to development, enhancing transport and freight trade integration. Low integration and intra-African trade barriers have been key impetuses to regional development (Pádraig Risteard Carmody, 2011). HSR would solve many infrastructural issues. Exporting and building Shinkansen wins contracts and income for Japanese firms.

Industry Spillovers: HSR requires many secondary industries during and after construction. HSR technology relies on complex industrial processes and specialized high-tech maintenance expertise. An African HSR network would generate demand and a market for new high-tech sectors, increasing incomes.

Recommendations

Partnership in one area enhances integration, and these recommendations should not be pursued separately. They are interconnected and necessary to achieve overarching objectives.

1. Strengthen Multilateral Ties

Japan must strengthen ties with the African Union to build trust with regional partners facilitating trade, investment, and development while creating a new narrative of Japan as a strong development partner. Steps towards implementation include increasing diplomatic engagement and partnerships and appointing a permanent representative to the African Union.

a. Increase diplomatic engagement and partnerships with individual African Union countries

Japan must demonstrate commitments to African development. Japan is unlikely to garner broad regional support without developing smaller bilateral partnerships. Increasing diplomatic presence in leading African countries through new consulates or expanded embassy staff is crucial. Combining this with knowledge, education, and aid programs, such as agricultural technology sharing, university partnerships, and humanitarian aid, will enhance diplomatic engagement.

b. Appoint a permanent representative to the African Union

Japan should appoint a permanent representative to the African Union once bilateral ties are strong. By cooperating with individual African countries, Japan can position itself as a reliable and trusted regional partner. A Japanese representative would increase Japan's multilateral engagement while assisting regional development.

Strong multilateral ties are crucial for development cooperation. Simultaneously, Japan should seek greater integration within AfCFTA to benefit from African trade and multilateral access to markets and resources. AfCFTA partnerships can be pursued alongside African partnerships.

2. Develop Key Infrastructure

Infrastructure is crucial for African regional integration and development. Japan should invest to build infrastructure, leading to spillover development benefits. Japan can assist in constructing an African rail system like Shinkansen.

Strong cooperation from African governments is essential for secure and broad infrastructure investment. After partnerships are established, the implementation process involves the following steps.

a. Create sovereign lending structures

African governments cannot finance large infrastructure projects through their national incomes. Sovereign lending is necessary, but Japanese loans would be more beneficial. Japan receives diplomatic capital from loans, strengthening multilateral ties.

Japan's fiscal and monetary constraints may hinder sovereign lending, but it could still provide economic benefits. Japan could lend in yen, increasing foreign monetary supply, subsequently boosting exports. Japan should incentivize commercial banks to lend to African nations by providing loan subsidies while shifting costs to the private sector.

b. Create private sector incentive structure

Cooperation from Japanese firms is crucial for rail development due to their expertise, manufacturing capacity, and technology. Japan should incentivize technology exports and collaborate with local firms to boost development spillovers. Subsidies can be provided to the private sector and increased if processes are outsourced to local African firms.

3. Differentiated Conditionality Regimes

Competition in investment and cooperation remains a key hurdle for Japan. With many powers vying for influence in Africa, Japan must position itself uniquely to maximize cooperation. Most countries and international organizations provide conditions for development, such as democratization and market liberalization, while African countries prefer to retain autonomy. Japan should offer differentiated conditions without imposing unconditionality.

a. Debt denomination schemes

Most sovereign debt is dollar-denominated due to African currencies' significant fluctuations against the dollar. Offering different debt denominations,

like the yen, might be preferable. Since the yen depreciates against the dollar, yen-denominated debt may be more manageable.

b. Trancheing and private investment quotas

Japan could also increase cooperation under specific conditions. For instance, additional funds could only be provided if a recipient nation achieves a certain absolute value of foreign private investment. This approach incentivizes reforms that aid development while reducing inherent risks to cooperation and lending.

Conclusion

Japan's engagement in Sub-Saharan Africa offers a unique opportunity for economic and diplomatic cooperation, the strengthening of multilateral ties and the development of the African continent. Although historical collaboration has focused on Japan's economic assistance to sub-Saharan Africa, a more dynamic, bilateral partnership can be developed. By leveraging its strengths in areas such as industry, technology and education, Japan can differentiate itself from other countries and position itself as a reliable long-term partner. A mutually beneficial engagement with sub-Saharan Africa will not only enable Japan to exert global influence and contribute to Africa's development, but also strengthen its economic power in the decades to come.

ABOUT THE AUTHORS



Kento Ono

Kento is a student at the LSE, set to earn bachelor's degree in Finance in 2026. As well as being the first Japanese student in BSc Finance, he also serves as LSE Japan Society's Career Officer. He speaks Japanese, English, German, and French.



Nicolas Valladolid

Nicolas is a student the LSE, studying a bachelor's in International Relations and Affairs. He has interned at companies across several industries, including Brown Law Group and Synthase Capital Partners.



Raphaela Douglas

Raphaela is a final year student studying BSc International Relations and Chinese at the LSE. She is interested in pursuing a career in communications, public affairs, media, or finance.

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