State of extraction:

The new scramble for Africa

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A new scramble

In recent years Africa has experienced waves of new investment, particularly in mining, energy and agriculture, and has seen elevated commodity exports. These flows are tantamount to a new scramble, creating wealth for foreign direct investors, some local entrepreneurs and a growing comprador class. Resources are typically exploited without raising the living standards of the people and at significant environmental cost. On the ground this has engendered significant resistance. The new scramble is a modification of traditional imperialist relationships which Africa experienced with former occupying colonial powers. But how do we understand the differences between the old and new scrambles? Who ultimately holds the power?

The African economy has more than tripled in size since 2000 and the IMF forecasts that Africa will account for 11 of the 20 fastest growing national economies in the world up to 2017. But are these boom conditions – often related to oil or gas discoveries -- either sustainable or beneficial to the population? Whilst there is a growing middle class, said to be 300 million strong, inequalities seem to have sharpened. Over 50% of Africans, according to the Africa Progress Panel[1] live on less than US$1.25 per day. The benefits are therefore accruing to foreign capital and a sprinkling of local partners. In some cases wealth is accruing to large state-owned corporations, allowing leading politicians and their families and entourages to syphon off the cream. This is particularly notable in Equatorial Guinea and Angola, whose ruling dynasties continue on their respective thrones decade after decade.

This boom has been noticed by global capital which has sought to engage with the continent more vigorously. The traditional links sewn up with the EU and the USA are being outflanked by the recent entry of some newer players. Investors are impressed by growth rates. They see Africa as under-populated,[2] under-polluted,[3] under-regulated[4] and replete with large amounts of arable land and fresh water resources. Africa has become the site of many large-scale land and water acquisition transactions, often referred to as 'land grabbing'.[5]

The new scramble follows similar patterns to those of the old, without the factor of direct political control. It requires a willing local comprador class, which becomes a junior partner in the exploitation of local people, and often acting in the interests of a neo-imperial project. With globalisation and the consolidation of free markets and neoliberal ideology, there is much more complicity between the state and global capital. Often the collaboration with transnational capital is implemented through programmes of localisation, indigenisation or 'black economic empowerment'. Few African firms, with the exception of a handful of South African companies, have emerged as global players, yet there is a growing layer of African politicians and entrepreneurs who form part of what Susan George has dubbed the 'Davos class'.

The new players

To assert that there has been a new scramble, we need to look at the recent levels of investment on the continent, and look at flows of resources.

Measuring foreign direct investment according to the number of new projects commenced in Africa since 2007, we find that the top twenty nations still command about 80% of the total. The traditional investors are still there --- comprising the US, EU countries, Japan, Canada and Australia. But the growth of their presence has tapered off to around 8%. A new feature is the 21% growth in the number of investments undertaken by emerging economies. There are three strands to this: the more industrialised countries such as India, China and South Korea; African countries themselves such as South Africa, Kenya and Nigeria; and the gulf nations of Saudi Arabia and the UAE. In the wings but currently less prominent are other players such as Brazil, with an increasing presence, as well as Malaysia and Turkey.

While the US, UK and France continue to make the most new investments, the relatively slow or negative growth rates associated with a number of the EU countries can be attributed to post-2008 recessionary conditions. In the same period, there has been significant growth in the number of projects involving Indian, Chinese, Japanese, Korean and Saudi capital. Another noticeable trend is the investments deriving from within Africa itself. Key investment sectors include the extractive industries (mining, oil, gas, timber), agriculture, and services (finance, ICT, infrastructure).

Table 1
Top 20 FDI new projects' source countries investing in Africa

Rank	Country	New Projects (2007-2012)	Compound Annual Growth Rate (2007-12)
1	United States	516	11.2%
2	UK	456	25.1%
3	France	398	-6.3%
4	India	237	24.0%
5	South Africa	235	56.5%
6	UAE	210	13.3%
7	Spain	194	-15.2%
8	Germany	173	14.9%
9	China	152	15.5%
10	Portugal	137	-26.8%
11	Kenya	113	60.0%
12	Japan	105	16.3%
13	Switzerland	105	3.7%
14	Italy	94	3.4%
15	Canada	86	13.2%
16	Nigeria	78	20.1%
17	Australia	69	-4.9%
18	Netherlands	58	7.4%
19	South Korea	57	51.6%
20	Saudi Arabia	56	45.4%
Rest	Other investor countries	844	

Source: Ernst and Young, 2013. Africa Attractiveness Survey, p. 34.

The new prominence of India and China on the continent has widened the investment base as well as the marketplace. The growth of these economies has led to the absorption of African products – in India's case, largely consisting of crude oil, with smaller trade in cashew, cotton, phosphates, generic pharmaceuticals, coal and gold. India in turn exports automobiles, machinery and services, indicating its ascendency in the value chain towards manufactured exports. The Tata automobile corporation assembles vehicles in South Africa and Senegal.

China's reputation in Africa is far more controversial, opening it up to criticism of reproducing colonial-type relationships.[7] Chinese trade, particularly in cheaper manufactured goods, has tended to flood African markets, undercutting and creating devastation in the case of local textile, clothing, footwear and household goods manufacturing. In many investment projects, China has insisted on providing its own labour force, excluding local employment. Deals have been made – for example in the Democratic Republic of Congo in 2007-8 – in which China has agreed to deliver local infrastructural improvements in exchange for rights over minerals extraction.[8] Some projects have seen manifestations of racist behaviour towards African people.

The bulk of Chinese investment takes place through large state-owned enterprises, but there has also been an expansion of private operations, especially those of a myriad of small and micro-enterprises. China's trade and investment in Africa have become geared towards meeting the needs of its own industrialisation programme. There is an elaborate supplementary programme offering development aid, debt relief, soft loans, scholarships, and the provision of technical support.

China has also been giving party-to-party support to African political parties to cover electoral campaigns. One of these is South Africa's African National Congress. As a result of this, the South African state has been reluctant to gainsay China in foreign policy matters. For example, the private invitation from Archbishop-emeritus Tutu in 2012 to the Dalai Lama to attend his 80th birthday party was declined owing to difficulties that the Dalai Lama faced in obtaining a South African visa.

Power is therefore being exercised through the

Table 3
Selection of current key Chinese investments in Africa

Corporation	Sector	Presence in Africa	Partnerships/acquisitions
Chinese National Petroleum Corp. – CNPC	Energy	Sudan, S Sudan, Chad, Algeria, Tunisia, Libya, Niger, Nigeria, Mozambique	ENI in Mozambique
Chinese National Offshore Oil Co. – CNOOC	Energy	Morocco, Nigeria, Gabon, Kenya, Uganda, Equatorial Guinea, Congo-Brazzaville	
Sinopec	Energy	Angola	Sonangol (Angola state oil co.)
China Guangdong Nuclear Power Grp - CGN	Energy	South Africa	Bidding to build future Eskom reactor fleet
Huawei	ICT	Nigeria and 38 other countries	
Lenovo	ICT	S Africa, looking to Kenya, Nigeria	Acquired IBM PCs
ZTE	ICT	Egypt, Ghana, Nigeria, Tunisia, Kenya, Zambia, Algeria and Ethiopia	Nitel in Nigeria
China Minmetals Corp.	Metals	South Africa	
Jinchuan Grp	Metals	South Africa, Zambia, DRC	Wesizwe Platinum, Metorex
Industrial and Commercial Bank of China	Finance	South Africa	Acquired 20% of Standard Bank of South Africa, with affiliates in 19 African countries

Sources: Corporate websites and annual reports.

creation of political dependency, rather than simply through trade and investment.

There has been little resistance to the model set up by China. However one exception is in Zambia, which has experienced severe labour problems and fatalities at Chambishi, a Chinese-owned copper mine.[9] In his unsuccessful presidential campaign in 2006, Michael Sata of the Patriotic Front ran on an anti-Chinese ticket. China threatened to withdraw its investments should Sata win, but he was unsuccessful. In 2011 Sata ran again for president but toned down his virulent opposition to Chinese investments. Instead he has come to terms with the presence of China, and soon after his inauguration, began to seek greater revenue for the Zambian state from Chinese and other foreign direct investments.

The resource curse and renegotiating control

The 'resource curse' is the concept recognising that, paradoxically, countries endowed with mineral wealth tend to have slower rates of economic growth, increased poverty and conflict. So, despite a new scramble for mineral extraction in Africa, the benefits seldom meet the needs of the broad population. Numerous factors can account for this, including inadequate revenues going to the host country, overvalued currencies, the tendency for other non-extractive export sectors to be negatively affected ("Dutch disease"), transfer pricing, corruption, and inadequate infrastructure.

Mining typifies the 'resource curse', in that the benefits are usually appropriated by those who gain ownership of the resource. Inadequate revenue agreements and taxation systems mean that host governments are seldom able to negotiate a fair distribution of income for all stakeholders, let alone compensating original owners of the resource. External costs are passed on to the state, often in the form of a legacy of environmental contamination, livelihood losses, health problems and social and physical displacement of populations.

Civil society organisations took up the campaign to make the extractive companies more transparent in their behaviour, and urging them to open their books. The Publish What You Pay campaign was initiated in response to a Global Witness report in 1999, detailing the opaque nature of the Angolan oil industry. In June 2003, the UK government opened the way for the creation of the Extractive Industries' Transparency Initiative. This set

Table 4
Top Global Mining Companies with African Investments

Company	Nationality	Global Ranking	Exploration	Mining Production	Smelting
BHP Billiton	Australia	1	Moz	S Af	S Af, Moz
Rio Tinto Zinc	UK	2		Zim, Nam	S Af
Vale	Brazil	3		Moz	
Anglo American	UK	4	Tanz, Moz, Zim, S Af, Bots, Mali, Nam	S Af, Nam, Bots, Zim	S Af, Nam
Phelps Dodge	US	7	DRC		
Newmont	US	9	Ghana		
Anglogold Ashanti	S Africa	12	Tanz, Ghana, Senegal	Tanz, Ghana, Guinea, Mali, S Af	
GlencoreXstrata	Switzerland	Merged 2013	Tanz, S Af, Côte d'Ivoire	S Af, Nam, Eq Guinea, Cam, Tanz, B Faso, Zam, Mauritania,	S Af
Barrick Gold	Canada	15	Tanz	Tanz, S Af	
Gold Fields	S Africa	20	Mali	S Af, Ghana	
Impala Platinum	S Africa	23		S Af, Zim	

Sources: UNCTAD, World Investment Report 2007: Tables IV.5-7, pp. 110-114. Company websites and annual reports.

out a series of rules which countries need to put in place around developing fair distribution of mining revenues. Countries which join need to set up a multi-stakeholder dialogue including companies, governments and civil society. They need to issue regular accessible reports on the progress towards transparency in the sector. However this is an entirely voluntary process, and some countries have stayed out of the process. Others such as the Central African Republic, Democratic Republic of Congo, Madagascar and Sierra Leone have not lived up to expected standards and have been suspended from the process.

In some countries, more transparency has been introduced. For example, in Guinea, the Revenue Watch Institute reported that the government had decided to publish its contracts with mining companies from 15 February 2013. Existing contracts – some signed under conditions of great opacity and revenue imbalance – will be fully reviewed. All contracts and amendments to contracts will be placed online, making access to the public much easier.

In Zambia the government raised the rate of taxation from three to six per cent for mining contracts in April 2012. This brought in an extra 46% in revenues during 2012 (amounting to US$6.3 billion). Even with the new tax, finance minister Alexander Chikwanda announced in parliament in November 2013 that mining contributed only 5 per cent to domestic revenues while in other countries of Southern Africa, the norm was 11 per cent. He attributed this shortfall to 'pervasive fraudulence' and set the Zambian Revenue Authority to design better systems for the state to determine mining output.

Whilst transparency may be a first step in the determination of fair mining revenues, the real power will only shift if the fruits of these are equitably distributed across the society. Across most of Africa there are still problems of the revenues being absorbed by the ruling families or elites, or being syphoned off in side deals with corrupt officials. Watchdog organisations and astute financial journalism are both essential in bringing malfeasance to light.

Fragile states

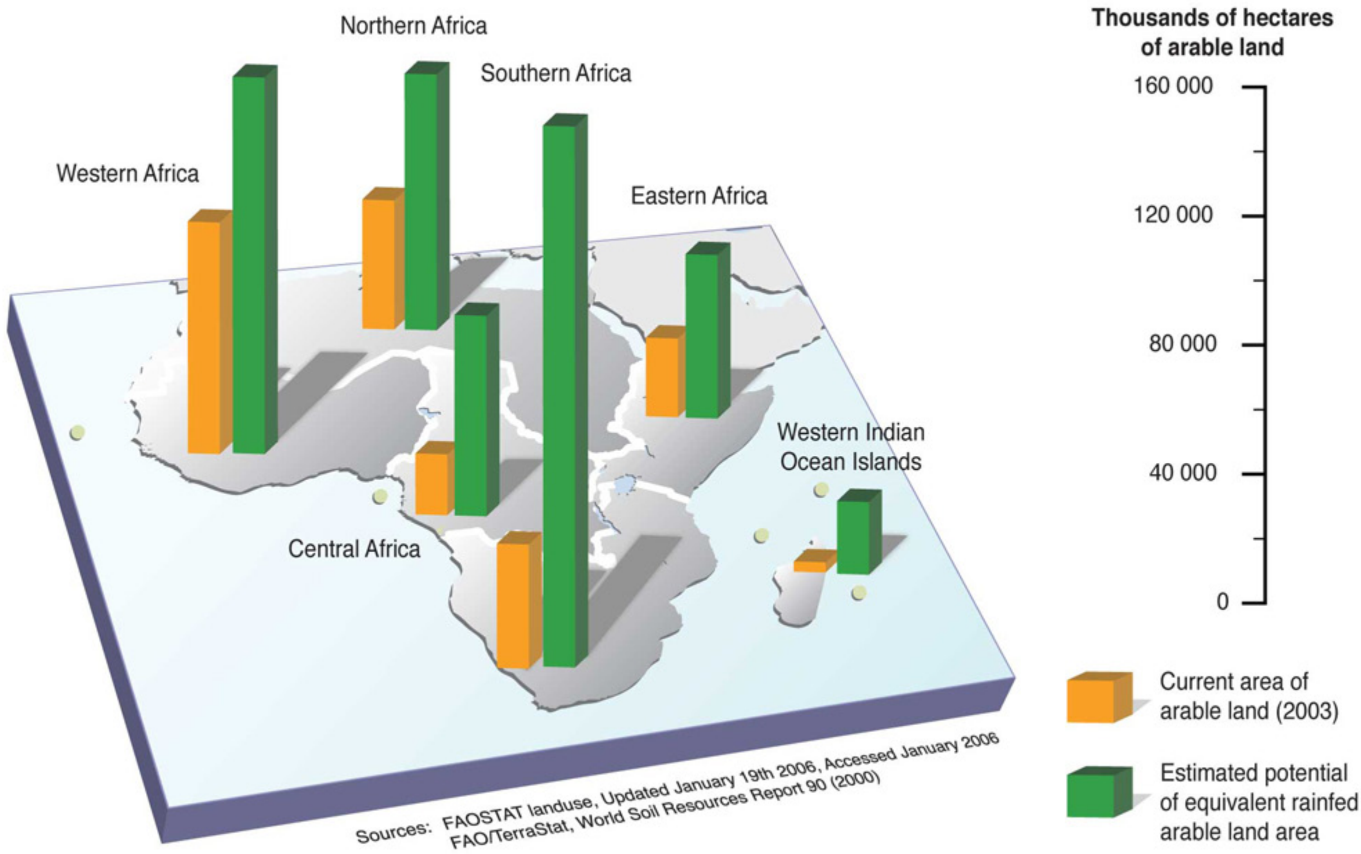
The key extractive corporations are larger in economic size than the countries in which they may be investing. This is a key indicator of how corporations can wield power in relation to states: securing tax breaksfrom the treasury, favours from politicians that are co-opted onto corporate boards or payrolls, and the corruption of regulatory institutions and courts. But what is often more significant is that the central state is too fragile or disorganised to be a presence in some of the areas where extraction occurs.

For example, in the DRC, it has been customary for private timber and mining companies in remote areas to be contracted by the state to provide local communities with social services in areas which the state cannot easily reach. In many cases the companies become a state-within-a-state. Their service provision is precarious, as it is not part of their core business. They might, for example, provide care packages to local people, consisting of soap, sugar, salt, coffee and beer). As a result, the communities are forced to honour the concessions to the companies and the central state has no local presence.

Despite a moratorium on the issuing of new logging permits, timber exporters in the DRC have been continuing on the basis of using illegal 'artisanal' permits. A series of recent reports by the independent regulator show systematic illegal logging activities and irregular conduct on a huge scale by transnational logging corporations. [10]

The DRC, along with eastern neighbours Rwanda and Uganda, has been implicated by the United Nations in exporting coltan (columbite-tantalite), an ore containing tantalum, an essential element in the manufacture of digital capacitors for cellular/mobile phones and a host of other electronic products. The tantalum has been extracted in North and South Kivu provinces under conditions of warlordism and serfdom, where rebels have seized the mines and force local miners to extract the mineral by hand. Human porters are forced to deliver the product to specified collection sites by carrying 50kg sacks of ore physically along equatorial forest paths for 50km distances. Armed militia extract tolls along the route. The UN Security Council has passed resolutions prohibiting companies from engaging commercially with rebel forces in the Eastern Congo. The US congress has passed the Dodd-Frank Act requiring US manufacturers to review their supply chains and exclude conflict minerals originating from the DRC. This is currently being contested in US circuit courts by the US manufacturing, chemicals and plastics lobby. Despite efforts to restrain consumption of conflict minerals, the trade continues. Consumers of digital products need to be mindful that the source minerals for these may be implicated in the conflicts in the Eastern Congo.

The question of resources extracted under conditions of conflict has also been highlighted in the case of



diamonds, which drove devastating civil wars in countries like Sierra Leone and Liberia, and continue to reproduce conditions of military repression in Zimbabwe. The diamond industry responded by creating the Kimberley Process, aimed at guaranteeing the origin of diamonds from outside conflict areas. The Process has been so controversial and porous that a key civil society watchdog organisation Global Watch has distanced itself from participation.

While it is extremely difficult to prevent corporations from taking advantage of fragile states, poor regulation, conflict and corruption in order to facilitate the extractive process, these challenges should be placed more centrally on the global multilateral and social movement agendas.

The new monocrop frontier

Soya is undergoing a global boom. It is an ingredient in many processed foods, where it is a bulking agent and a relatively cheap form of protein. It is used in feed for cattle and other livestock. Production has traditionally centred on the USA, Brazil and Argentina. In all three the moving soya frontier has reproduced problems of concentration of land ownership, displacement of other land uses and other food crops, and ecological contamination due to heavy use of genetically modified crops and pesticides. Part of the reason why the frontier moves is because expanded production requires more extensive rather than more intensive land holdings, greater mechanisation (requiring more capital and less labour), and because traditional crop lands may have become too expensive. Mono-cropping imposes greater limits on biodiversity, being particularly prone to creating conditions for deforestation of regions like the Amazon. Efforts to offset the worst of the ecological problems, for example by the industry creating a Round Table on Responsible Soy hasdone little to address the harmful impacts of the shifting frontier.

The shifting frontier in Latin America is echoed in Africa in the ProSavana project, in which Brazilian and Japanese capital are jointly stimulating the opening up of an extensive new monocrop soya and sugar cane frontier in Mozambique. Situated in the Nacala corridor in Mozambique's northernmost provinces, the project will cover around ten million hectares of land in at least 19 districts. The aim is to emulate development of the Brazilian Cerrado, a savannah-like ecosystem in the country's central highlands, in which agricultural expansion was financed by Japanese interests starting in the 1970s.

Critics have shown that the expansion of the Cerrado frontier led to severe deforestation, displacement of family farms, and soil contamination through the massive use of pesticides for monocrop soya and sugar plantations.[84] The question that arises is whether the unsustainable development of the Brazilian Cerrado should provide a model for agricultural development in Mozambique.

Justiça Ambiental, one of Mozambique's foremost environmental NGOs, affiliated to Friends of the Earth, has critiqued the ProSavana 'master plan' for its complete lack of transparency, public consultation and public participation. The plan was embargoed by all three participating governments, and the four million small farmers in the project area were not given any information. In the leaked version it became clear that the project had two key aims: pushing of small farmers out of traditional land management practices into intensive monocrop cultivation based on commercial seeds, chemicals and private land titles; and the pushing of small farmers into contract arrangements with large-scale agribusiness. The 'master plan' was drawn up by Brazilian consultants closely related to agribusiness enterprises, including some with links to the Mozambican presidential family, and some with existing interests in the Nacala Corridor.

In a similar fashion, Saudi concerns about food security in the global food crisis of 2008, during which there were shortages at home, led to the establishment of a fund to develop farming operations in other countries and the acquisition of Saudi-owned croplands in Sudan, Egypt and Ethiopia, amongst others.

Saudi Star, a company led by Ethiopian national Mohammed Hussein al-Almoudi, has obtained an area of 300 000 hectares from the government of Ethiopia, of which 10 000 hectares has already been devoted to a pilot rice-growing project. In Sudan, Saudi corporation Hadco has acquired 9 000 hectares on the basis of a 60% Saudi government subsidy.

In relation to the new scramble for African land, a further series of problems has arisen. Land holdings have become more concentrated. Small producers are increasingly being excluded from markets and land. Farm workers face redundancy with the switch to greater mechanisation. Land quality is compromised by high inputs of chemical fertiliser, pesticides and genetically modified crops. Seed is increasingly being monopolised by a few (usually foreign) corporations. Claims on water resources are often ceded to larger landowners at the expense of small producers. The peasantry is increasingly being drawn into outgrower schemes for transnational land companies. Corporations are increasingly lobbying for the rewrite of land laws, which in many African contexts vests with the state, rather than being held under individual title. They see greater advantages to themselves in the marketization and commodification of land.

Resistance grows

All around Africa, as the new scramble for extractive resources has expanded, there have been responses by affected communities and social groups to the violations of their rights by the industry.

In the province of Tete in Mozambique, Brazilian conglomerate Vale has been mining coal at Moatize. Local people have been forcibly removed, affecting their livelihoods and access to familiar croplands. Their resistance has taken the form of blocking railway lines by which the coal reaches coastal ports for export.

At Ga-Pila in South Africa's platinum zone, communities have been resisting Anglo Platinum. This South African corporation has forced people to leave their areas, cut off their water supply, demolished their housing, and violated the graveyards of their ancestors. Replacement housing is remote and inadequate, without foundations or indoor sanitation. The community has appealed to the Human Rights Commission, a statutory body.

In August 2012, at Lonmin's Marikana platinum mine in north-west province of South Africa, rock drillers went on strike to point out that their wages had not kept up even with raging inflation. Their resistance was met with a massacre by police who shot 34 miners, urged on by prominent politicians who had a 9% stake in the mining company. This case has reverberated extensively, illustrating how far the state has moved from any fidelity to its founding ideals.

In Tanzania, the Bahi swamps - 120km north of the capital, Dodoma - has been the site of exploration for uranium. Community organisations have complained that the chemicals used in the exploration have affected their health, livelihoods and water supply. Community environmental campaigners bringing these issues to public attention have been harassed by police and district officials.

Stories like these are being reproduced all over the continent, and have resulted in the formation of a plethora of local and national campaigns, backed by growing international support.

The African Initiative for Mining, Environment and Society (AIMES) is perhaps the oldest of these. It has long raised issues of greater revenue and tax justice, promotion of the African Mining Vision (a charter signed by AU member governments) as well as community rights in the mining sphere. The brainchild of existing networks like the Accra-based Third World Network Africa, AIMES has held regular strategy and information meetings with its affiliates. Different networks have developed the Alternative Mining Indaba (AMI) which meets annually in Cape Town at the same time as the official Mining Indaba, a conference of governments and mining companies with interests in Africa. The AMI has staged a number of marches and protests against the industry's violations of people's rights. A more recent formation is the International Alliance for Natural Resources in Africa (IANRA), with membership from ten countries, and focusing on community rights, the lobbying of the pan-African parliament, and AU-sponsored human rights institutions, as well as on women in mining. The Global Campaign to Dismantle Corporate Power and Impunity established an African office in 2013, and this will be taking on the question of extractive industries more vigorously.

Activism on a continental level against uranium mining is embodied in the African Uranium Alliance, a network of over thirty organisations engaged in alerting the public to the health, environmental and other consequences of the uranium and nuclear industries. With its headquarters in Windhoek, Namibia, AUA has worked closely with affected communities and has participated in large continental meetings and site visits in Mali, Tanzania and Namibia.

In Southern Africa, Bench-Marks Foundation, established by faith-based organisations has been training mining communities to monitor the industry and contribute to research reports that it produces. It has established a solid footprint of activism and advocacy across the sub-region, and was responsible for reports on the plight of South African platinum workers and mining communities only days before the Marikana massacre occurred.

Together with the formal research community, human rights workers, and gender activists, there is now no shortage of data and reports informing struggles in the African extractives sector. Despite this, it should be noted that most of the campaigns and networks are fragile and under-resourced, yet continue to undertake hugely important work.

Conclusion

It is extremely heartening that African communities and organisations are gaining a greater understanding of the dynamics of the new scramble for the continent's resources. Only when it is seen as a new wave of expansion of capital, can adequate strategies for challenging it be discussed, formulated and implemented.

One symptom of the resource curse is greater inequality. Given that the new scramble does not challenges old imperialist development patterns, it will continue to unfairly impact host communities and environment and increase concentration of control over land and mineral resources.

So what can shift these power relations? Will the changes need to be made in the countries where the corporations are based? Will public outcry against the violation of rights of African communities be sufficient to shift corporate behaviour? Preconditions for a power shift need to include the fairer allocation of rents and revenues, as well as full corporate disclosure and transparency. Decent labour practices, fair wage rates and freedom of organisation of workers are also part of the picture. Trade and investment agreements need to move away from imposing the model of "free trade", and instead focus on helping to nurture local development of ancillary industries, adding value to primary commodities, and other job-creating linkages.

Action in the North may be part of the solution, but a transformative shift will depend on actions taken in Africa. Africa needs to address issues of clean governance and resist corporate capture of state and multilateral institutions. It needs regulatory controls that place people's welfare and environmental justice as core interests and outcomes. It needs to reverse the impunity with which its elites accumulate. A vigilant civil society, free from persecution by authorities, must be allowed to play its part.

A number of African institutions have pinned their hopes on the Africa Mining Vision (AMV), a document developed and endorsed by African political leaders in 2009. The AMV does suggest that the old model of accumulation needs to be replaced by measures that treat people and environment more benignly, and sees mining as having potential to create more employment and fight poverty. However the values it embodies have not been encouraged by governments and industry, and the message of the AMV is still hardly applied and not enforced on the continent. The AMV also has its critics who argue its focus on technical and other considerations mean that it does not really question the sustainability and economic potential of the extractive sector. While some Latin American leaders have entertained the idea of leaving resources "in the ground" as a better solution to fighting poverty and achieving sustainability, no similar radical call is heard from African leaders.

What really needs to occur is a vision emanating from below, rather than a hollow document from above which cannot even be accessed either on the AU or the dedicated AMV sites. In Africa, governments cannot be relied upon to take up the quest for such a vision, and the onus now rests on civil society to reinvigorate the debate.

1 The Panel is led by Kofi Annan, and includes Olesegun Obasanjo, Graça Machel and others.
2 Mo Ibrahim, a Sudanese-born British businessman and philanthropist, has pointed out, "Africa is under-populated. We have 20% of the world's landmass and 13% of its population" (Perkins, 2010). Despite this, the African population exceeded 1 billion at the end of the first decade of this century.
3 Lawrence Summers, then chief economist of the World Bank, stated in a 1991 memo: "I've always thought that under-populated countries in Africa are vastly UNDER-polluted, their air quality is probably vastly inefficiently low compared to Los Angeles or Mexico City" (Pellow, 2007: 9). This opinion has been highly contested by African civil society.
4 Financial writer Jo Clarke claims that: "Risks with tax reform, infrastructure, energy and water security, carbon emissions policy, industrial relations and lengthy regulatory approvals in Australia are beginning to outweigh the sovereign risk of starting new mines in far less-developed nations.' (Clarke, 2012).
5 The Oakland Institute has published an extensive series of briefs on land deals in Africa. See www.oaklandinstitute.org. Also see Contesting Global Landscapes, the papers prepared for a conference on land grabbing at Cornell University in October 2012, at www.cornell-landproject.org/activities/2012-land-grabbing-conference/papers/.
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11 The others include Turkey, Ukraine, Kazakhstan, Vietnam and Brazil. See Al-Obeid, 2010: slide 14.