

ISSUE

REPORT N° 37 — September 2017

African futures: Horizon 2025

RAPPORTEURS

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Reports



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Print ISBN 978-92-9198-630-9 ISSN 1830-9747 doi:10.2815/21448 QN-AF-17-007-EN-C

PDF ISBN 978-92-9198-631-6 ISSN 2363-264X doi:10.2815/561974 QN-AF-17-007-EN-N

Published by the EU Institute for Security Studies and printed in Luxembourg by Imprimerie Centrale.

Cover photograph credit: Mark Schiefelbein/AP/SIPA

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FOREWORD

Nearly half a century ago Albert O. Hirschman¹ published a ground-breaking study on responses to problems and crises in organisations, communities, polities, states and families. Entitled *Exit, Voice and Loyalty*, the study highlighted how differently (and how typically) individuals and societies react to decline or conflict. He once acknowledged that his study – still a classic for social and political scientists worldwide – was prompted by his observation of rail transport in Nigeria. Yet the typology suggested in his book could easily apply to many other situations (one famous example being German unification in 1989/90) and, surely, to most of the issues raised and analysed in this EUISS Report.

The impulse to explore Africa's futures came from the experience made with previous projects carried out at the EUISS: on the Arab world (2015), Russia (2016) and China (2017) respectively. Each of those followed a tailor-made approach, although all aimed at identifying medium/long-term trends – and so does this one, focused as it is on 'trendspotting', too, but through specific and selective lenses.

Africa as a whole has become increasingly relevant for – and indeed in – Europe, due *inter alia* to the migratory pressures ('exit', or leaving, to echo the title of Hirschman's book) and radicalisation concerns ('voice', or fighting) of the past few years. The 2016 EU Global Strategy goes as far as to incorporate the entire African continent (and not just North Africa) in the 'peaceful and prosperous' cooperative regional order it seeks to promote around the Mediterranean and the Middle East. Similarly, the recent Joint Communication by the EEAS and the European Commission on 'A strategic approach to resilience in the EU's external action' devotes much attention to the continent, both directly (e.g. Nigeria) and indirectly (climate- and conflict-related vulnerabilities). Yet Africa is not just a source of concern: it is also a vibrant and dynamic macro-region – the youngest continent in the world, often governed by its oldest rulers – which can easily foster 'loyalty' (acceptance and commitment), too, and will surely impact the twenty-first century in many unpredictable ways. This is precisely the open-minded and engaged approach that the EUISS project has adopted from the very beginning and tried to translate into this Report – prepared also in view of the forthcoming 5th Africa-EU summit, scheduled for 28/29 November in Abidjan, Côte d'Ivoire.

1. Albert O. Hirschman (1915-2012) was a German-born scholar and internationalist who left his country after 1933 to study in France, the UK and Italy. He fought on the Republic's side in the Spanish Civil War and with France in 1940, before engaging in the rescue of leading European artists and intellectuals escaping to the US from occupied France. He then served in the US Army – in the famous Office of Strategic Services – during World War II, worked for the US Federal Reserve, assisted with the implementation of the Marshall Plan in post-war Europe (his elder sister Ursula, incidentally, married Altiero Spinelli), and advised Latin American governments before joining top US universities.

Acknowledgements

‘African Futures – Horizon 2025’ has benefited from many types of input and forms of support through an explicitly consultative and cooperative process. The Institute is grateful to the Egmont-Royal Institute for International Relations in Brussels for allowing Valérie Arnould to steer a significant phase of the work leading up to this publication and for co-organising the opening workshop, held in Brussels on 1 March [see Annex]. Similarly, the Scuola Superiore Sant’Anna (SSSA) in Pisa and NUPI in Oslo ‘lent’ us Francesco Strazzari to team up with her throughout the project. The methodology adopted for this Report is set out in detail in their introduction.

Morocco’s OCP Policy Centre (OCP PC) kindly set up and generously funded another major conference in support of the project, held in Rabat on 4 April, and provided relevant insight on various occasions, in line with the country’s self-perception as a ‘bridge’ between Europe and Africa. The Open Society European Policy Institute (OSEPI) took the lead in organising a dedicated seminar in Brussels on 10/11 May. Similarly, the African Institute for Security Studies (ISS) has actively collaborated throughout by offering regular analysis and feedback – building on its own ‘African Futures’ research findings and publications² – and hosted the final workshop, held in Pretoria on 29/30 June. The Robert Bosch Foundation in Stuttgart has generously funded the event in South Africa and offered to help disseminate and discuss the project’s findings. And Chatham House has permitted Alex Vines to contribute to the Report with his vast knowledge and experience of Africa. Last but certainly not least, Nicolò Russo Perez from the Compagnia di San Paolo in Turin has constantly assisted us in identifying the most appropriate partners and formats to bring this project to a successful completion.

These acknowledgements show the extent to which this has been a truly collective endeavour, involving a large number of participants from both Europe and Africa [see Annex]. The drafters and crafters of the Report – and the Institute in its own right – owe particular gratitude to the members of the African Futures Task Force who have accompanied and nurtured its preparation over the past number of months, and notably to Ciara Aucoin (ISS), Abdelhak Bassou (OCP PC), Julia Bello-Schuenemann (ISS), Angel Carro Castrillo (EEAS), Jakkie Cilliers (ISS), Bram Dijkstra (OSEPI), Youssef El Hayani (OCP PC), Marta Martinelli (OSEPI), Nicoletta Pirozzi (IAI), Luca Raineri (SSSA), Natznet Tesfay (IHS-Markit) and Elizabeth Tison (EEAS).

At the EUISS, Laura Kokko acted as overall project coordinator from Paris and managed to juggle all stakeholders and participants while also providing valuable research assistance – along with Aleksandra Tor and Alice Vervaeke (who also prepared the Annex). José Luengo-Cabrera did some preliminary work for the project.

2. The ISS’s focus has been more long-term, first looking to 2050 and then, more recently, to 2035: see J. Bello-Schuenemann et al., *African Futures – Key Trends*, ISS, May 2017.

Specifically, Valérie Arnould wrote most of chapters 1 and 5, Alex Vines most of chapters 2 and 4, Gerald Stang most of chapter 3 and Francesco Strazzari most of chapter 6. Gearoid Cronin edited the final text with his usual dedication and accuracy and Christian Dietrich worked his magic on the infographics.

Antonio Missiroli
Paris, September 2017

INTRODUCTION

If Sub-Saharan Africa's future had to be encapsulated in a single word, it would be *transformation*. In recent years the continent has undergone significant economic, socio-political, and technological transformations, a process which is likely to accelerate over the coming decades. While it would be an overstatement to proclaim that the future will be African, there are strong indications that the global importance of the continent is set to rise – and not only as a source of risk factors spilling over from poverty and instability. By 2045, approximately a quarter of the world's population will be African. Looking ahead, there is also the potential for Africa's economic growth to outpace the global average. The expansion of foreign direct investment (FDI), which today already outstrips aid, could drive further integration of African countries in the world economy. The diversification of Africa's relationship with external partners – which now not only include traditional Western partners such as the EU, but also Asian, Middle Eastern and Gulf countries – will also contribute to increasing Africa's prominence in the global arena.

These developments are accompanied by growing assertiveness on the part of African countries, institutions and citizens in taking the lead in framing what Africa's future will look like. This is illustrated by increased leadership by African regional organisations and coalitions of African states in defining regional or continent-wide economic and security initiatives (albeit still with a dependence on logistical and financial support on external partners for their implementation). The activism of youth movements, growth of innovation hubs, and the emergence of a new decolonisation movement seeking to reclaim African ownership of knowledge production on matters pertaining to Africa, all attest to the dynamism of the continent. What is likely to emerge over the longer term is a more outwardly projecting Africa..

But as African countries experience an acceleration of economic, socio-political and technological transformations, they will also confront dislocations in various areas. The capacity, readiness and willingness of African governments to manage these obstacles will be key to defining the course of Africa's future. Significant challenges also need to be overcome if African countries are to realise their potential. These include their resilience to global economic uncertainty and climate change pressures and their integration in the world economy in a productive rather than extractive role. Although levels of armed conflict have declined since the 1990s, armed conflict remains prevalent on the continent and continues to outpace the global average, which entails a high social and economic cost for African societies. Further challenges include infrastructural, capability and governance obstacles to the expansion and deepening of inter-regional trade and the fact that large segments of the population continue to lack access to basic infrastructures and services.

The objective of this Report is to reflect on the major trends that will orient Africa's future, looking ahead towards 2025. Such an attempt at forecasting African Futures

is confronted with three significant challenges. First, there is a lack of reliable data on many key economic, political and security indicators due to the weak capacity of governments and regional or international organisations to collect and analyse data and the fragmented and dispersed nature of much of the data collection. Therefore, it is near impossible to make accurate predictions on future trends, even in the short term. Second, there is a tendency to compare the performance of African countries against an ideal benchmark, which fails to take account of the low base from which many African countries started out. Comparing African transformations and progress against global averages or developments in other regions is therefore of limited use as it may lead to undervaluing the changes that have taken place on the continent. Africa should thus be assessed against its own realities. To detect and understand trends it is less useful to observe a given African country's global ranking based on one or more indicators, than to examine how it performs *vis-à-vis* other countries in the (sub-)region, and ultimately, its own performance in the past. Lastly, it must not be forgotten that the African continent is immensely diverse – ecologically, politically, economically, and culturally. A single African future therefore does not exist. While there are some overarching challenges which nearly all African countries will confront, the way in which these will play out will vary by sub-region or country.

In light of these considerations, this Report does not seek to put forward specific forecasts about a whole host of indicators that are of relevance to the future development of African countries. Instead, it zooms in on six key overarching trends or challenges which African governments and societies will face over the coming decade, and which are clustered in three categories: socio-political, structural and security transformations. The Report thus does not aim to draw an exhaustive picture of all possible trends, but to identify the dominant trends which are likely to have the most significant impact on Africa's economic, political and security futures. First, two key trends at the socio-political level are that African countries will have to address the contrasting challenges of the disappearance of ageing long-standing rulers and the expansion of the youth bulge. Second, economic and structural trends will centre on the challenges of growing resource depletion and land pressures, complemented by patterns of diverging growth and inequality. Lastly, the dominant security trends are, on the one hand, the consolidation of multi-layered security challenges and, on the other, the persistence of religious extremism as a vector of violent mobilisation. Each of these trends is individually outlined in the subsequent chapters of the Report. The chapters set out the broad contours of these trends, why they matter for Africa's futures, and explore some regional or country-level specificities.

Encircling and fuelling these trends are several drivers of change, which operate at a deeper and more macro level. These drivers are factors that evolve across a space-time continuum that goes beyond that considered in this study. They frame the environment in which the above-identified trends will unfold, thereby to some extent conditioning how they will develop and with what impact. They also determine

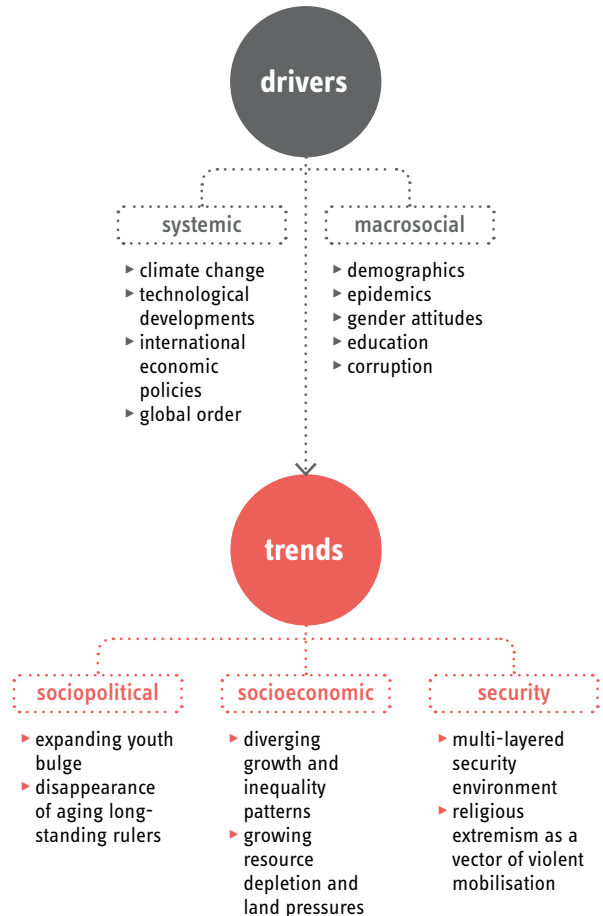
how successful African governments and societies will be in managing the challenges or reaping the benefits flowing from these six trends.

Attention to drivers of change is a methodological approach commonly used in studies by development agencies intent on producing contextualised response strategies to ongoing challenges. The underlying idea is that not everything is just a trend: the way development happens is shaped by structural conditions, a clear understanding of which is needed to improve our grasp of strategic dilemmas, insights and initiatives. The implications of these drivers of change for the six above-mentioned trends will be addressed in a cross-cutting fashion across the Report's chapters.

On the one hand there are systemic drivers of change. These are exogenous factors that originate in the outer macro-environment, i.e. the segments of the international system upon which state and non-state African actors can only exert a limited direct influence, but whose positive and negative effects are deeply felt across Africa, thus requiring adaptive responses. These are mechanisms whose dynamics are to a large extent beyond the control of most African leaders and policymakers today, but whose impact will need to be managed to ensure they do not negatively contribute to the above identified trends.

Thus, African leaders and citizens will have little control over oil, gas and commodities prices, over the purchasing choices of US food consumers, over the Chicago Mercantile Exchange (CME), and on how agricultural prices will be impacted by consumer demand in affluent societies in general. Likewise, the dominant orientation informing international financial institutions' strategies, fiscal doctrines and

Figure 1: Dominant drivers and trends



trade agreements is enormously relevant for the future of Africa, but this is something that is near impossible to forecast and over which African governments have little control. Economic strategies such as delocalisation favoured by multinational companies are also beyond the control of local actors, given how strategic investments are sensitive to comparative advantage and other environmental factors: global corporate governance regulation and practice reflect how businesses operate in a truly global marketplace.

Changes in the nature of the global order will also be highly relevant to Africa's future as they will influence the kind of political, economic and strategic partnerships that African countries will build with external partners. The degree to which global governance will be affected by multilateral views and doctrines – be they liberal interventionism, nationalism and protectionism or otherwise – will also influence the degree and nature of foreign intervention on the continent. In addition, global democratic trends are likely to significantly impact governance trends in Africa. For instance, a democratic involution or regression worldwide, but particularly in the OECD area and in the Western world, would be highly likely to adversely affect the impetus for change in Africa as well as lead to a reduction in support for civil society-led advocacy and reform projects.

Africa will also be confronted with huge climate change-related challenges caused by shifts in temperatures (the Intergovernmental Panel on Climate Change estimates that by 2100 Africa will have warmed up 1.5 times faster than the global average), changing rainfall patterns and variability, rising sea levels and increases in extreme weather events. Although there will be important regional differences across the continent (for instance, changing rain patterns and variability may lead to increased desertification in some countries, while others will see an increase in rainfall and concomitant risk of severe flooding), climate change will put strains on the adaptive capacities of African societies and governments. Climate change will not only create stresses in terms of food security, water scarcity and resource management, but also strain the capacities of governments to deploy the institutional tools and resources needed to address the six identified trends.

The technological revolution currently underway is undoubtedly another important systemic driver of change. This new revolution is one where technological advances in previously disparate fields such as robotics, artificial intelligence and machine learning, cloud technology, 'big data', nanotechnology, 3D printing, peer-to-peer platforms, genomics and biotechnology are all building on and amplifying one another. To cite only one example, will drone technology be able to help overcome problems posed by the poor state of African road and rail transport infrastructure? In Africa, drones are today seen as an ideal solution in various domains including the inspection of infrastructures or crops, delivering medical aid, mapping, surveillance and wildlife conservation. African skies will soon see drones being used for multiple activities, from emergency services to mining and property development. It is too soon to say whether drones will impact on space as much as the advent of

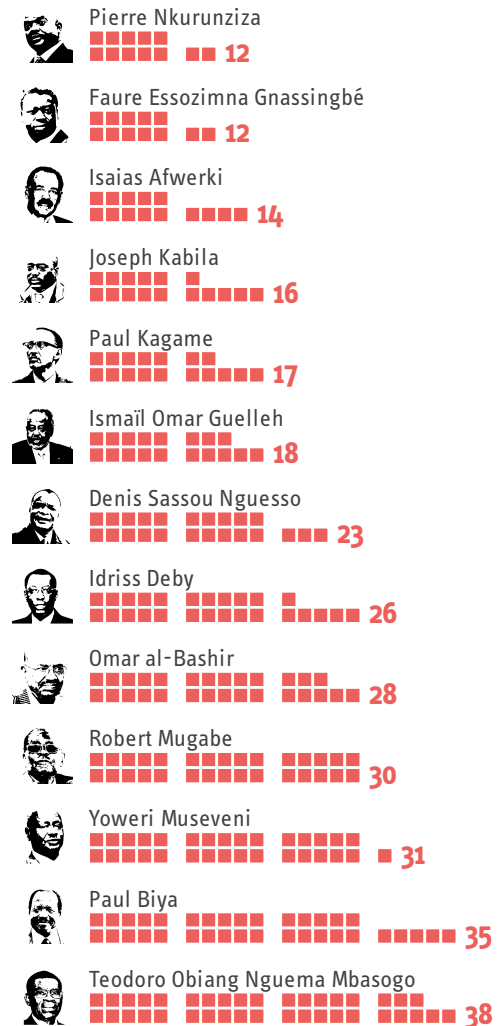
mobile telecommunications did, with a veritable explosion in consumer demand that has made subscription growth rates in Eastern and Central Africa the highest in the world, accompanying the rise of an industry sector that showed low sensitivity to conflict and geopolitical volatility. The diffusion of telecommunications infrastructure also enabled mobile banking to spread across the continent, introducing different forms of money circulation (mobile money transfers, digital currencies etc). The digitisation of financial services has created enormous opportunities, but it also creates an environment where cyberterrorism, cybercrime and cyberfraud loom as potential destabilising factors. The ways in which new technologies might transform social mobilisation, political participation, and sociopolitical contestation, especially among young people, will also shape Africa's future.

A second category of drivers of change can be considered macro-social transformations. These are processes endogenous to Africa but which, like systemic drivers of change, are inherently unfolding over the longer term: African governments appear to have limited direct control over them. Demographics are an obvious example. Although policy efforts to promote birth control are being discussed by African leaders (e.g. in the Sahel sub-region), there is little doubt that population growth in Africa will continue. This development will be amplified by a growing youth bulge and high rates of urbanisation. Intra-African migration, which currently accounts for about 80% of African migration, will add to these demographic pressures. Other important macro-social change processes that will affect whether African countries will be able to reap the benefits and curtail the potential negative effects of the six above-identified trends relate to more institutional and sociocultural developments, in particular corruption, gender attitudes, and – also as a reflection of these – the consolidation or erosion of institutional capacities. Lastly, while advances have been made in tackling certain serious diseases such as HIV/AIDS and reducing infant mortality, periodic public health crises and epidemics will continue to pose significant challenges in Africa over the longer term, and may even increase under the effect of climate change. These not only carry high human costs but also economic and political costs that will determine whether some of the identified socio-political and economic transformations will produce positive or rather negative effects.

I. THE DISAPPEARANCE OF LONG-STANDING RULERS

The political governance landscape in Sub-Saharan Africa has strengthened on various fronts since the ‘third wave of transitions’ in the 1990s, but consolidation remains fragile and developments have been uneven across the continent. A particularly notable phenomenon has been the prevalence and persistence of long-standing rulers in Africa despite the decline in formal one-party rule regimes in favour of multi-partyism. At present, about 30% of African countries are ruled by long-standing rulers (this refers to heads of state who have been in power for more than 10 years, i.e. beyond the classic five-year two-term mandate – except in countries such as Liberia, Senegal and Cape Verde which expressly provide in their constitutions for either 6 or 7-year terms or three-term limits). Africa also counts one of only seven absolutist monarchies still in existence today (Swaziland). While Africa is not the only continent where this phenomenon is present, it is, alongside Central Asia, the region with the current highest number of long-standing rulers, as well as the region with the longest ruling leaders (occupying 7 of the top 10 spots). It also has a history of long-standing rulers as a prevailing mode of governance: about a fifth of all African heads of state since independence can be classed as long-standing rulers and only five African countries have never been ruled by a long-standing leader.

Figure 2: Current African long-standing rulers
Years in power



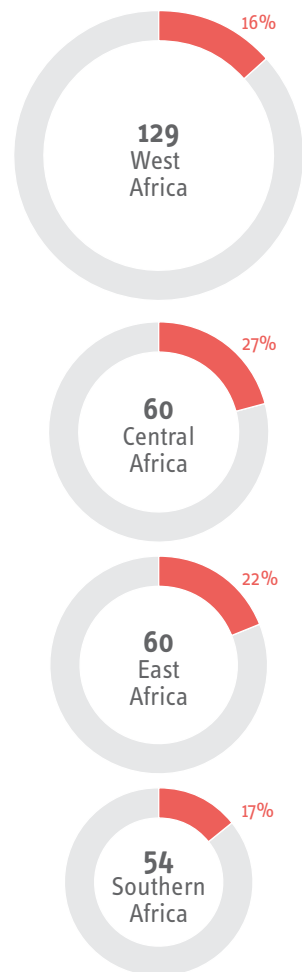
Democratic governance: a mixed picture

This trend has happened against a background of mixed democratic developments in Sub-Saharan Africa. On the one hand, average democracy scores have increased since the 1990s and elections have now become the main means through which power transitions occur. A particularly important trend in this regard has been the significant decline in military coups: while 142 coups (of which 63 were successful) took place between 1950 and 2000 in Africa, only 33 coups (of which 12 were successful) occurred between 2000 and 2015. Yet while electoral democracies have become more common on the continent, their quality is uneven. Freedom House currently categorises 44% of African countries as ‘not free’ and 45% as ‘partly free’, while the Economist Intelligence Unit does not class any country in Sub-Saharan Africa as a full democracy and Polity IV classifies 61% of countries in Africa as ‘anocracies’ (these are political systems combining democratic and authoritarian traits and practices). The quality of electoral processes also leaves a lot to be desired, as vote rigging or manipulation and electoral violence remain prevalent. Important challenges further remain in the delivery of accountability, rule of law, and in the protection of rights guaranteeing citizen participation, such as the freedom of expression and association and the violent state repression of street protests. The above gaps are reflected in Afrobarometer’s findings that in 26 of 36 African countries surveyed, the popular demand for democracy exceeds the perceived supply of democracy. All this suggests that the transitions to multi-partyism initiated in the 1990s in Africa have not resulted in a linear democratic progress but rather in the predominant emergence of hybrid regimes and weak democratic institutionalisation.

There exist, however, important regional differences. While the level of democracy has over time been higher in Southern Africa than in West and East Africa, the latter two regions have since the late 1990s experienced a more continuous average increase in democratic governance while Southern Africa has seen more erratic dips and rises. At the same time, despite having experienced a positive political governance shift, West Africa has remained the region most susceptible to military coups. In

Figure 3: Historical overview of long-standing rulers

Percentage of long-standing rulers (out of all leaders that have ruled since 1960)



Data: Archigos

contrast, Central Africa is the only region that has experienced a democratic regression since the mid-1990s and it continues to be highly vulnerable to military coups. Regional differences also exist in terms of long-standing ruler trends. The phenomenon has been most prevalent in Central Africa and least prevalent in Southern Africa – thereby mimicking broader democracy patterns. Attempts at circumventing presidential term limits have on average been more successful in Central Africa than in West Africa, which suggests that higher levels of democracy may act as constraints on attempts by rulers to overstay their term in power.

Ageing rulers: an obstacle to democratisation?

The persistence of long-standing rulers reflects weak democratic institutionalisation and the continued marked preference of most post-independence African countries for strong presidential systems, characterised by weak separation of powers, strong centralisation and significantly high levels of rent extraction. In principle, long-standing rulers do not necessarily equate with poor governance and despotic rule, as illustrated by Leopold Senghor in Senegal or Quett Masire in Botswana. In practice though, ‘good’ long-standing rulers have been the exception rather than the rule in Africa. Most have presided over authoritarian and kleptocratic systems that have performed poorly on political and socioeconomic governance indicators.

The phenomenon also runs counter to the growing recognition of the principle of presidential term limits as a good practice for states, as enshrined in the African Union Charter on Democracy, Elections, and Governance. The 1990s also saw many African countries adopting new constitutions in which two-term limits were introduced with the express purpose of constraining executive power and preventing the emergence of long-standing rulers. At present, only 11 Sub-Saharan African countries (of which two are monarchies) have no term limits in their constitutions, while one country (Cape Verde) has a three rather than two-term limit. Beyond these legal provisions, Afrobarometer surveys also show that 74.8% of African citizens favour term limits.

The prevalence of long-standing rulers is problematic because it often acts as an obstacle to democratisation. To remain in power, long-standing rulers have resorted to questionable means of ‘legal engineering’ (such as forcing through changes to term limits via a pliable parliament or the organisation of referendums, resetting the counter to zero once presidential terms are introduced, or applying for court rulings legalising third-term bids) which contribute to weakening the rule of law and hollowing out existing institutions. The prevalence of long-standing rulers also closely ties in with the lack of genuine alternation and transfers of power that have thwarted the development of more accountable governance in Africa. It is notable that the reintroduction of elections has not commonly led to an increase in transfers of power: of all presidential elections held between 1990 and 2000, only 15% were won by opposition candidates. This effect of the power of incumbency is even

stronger in the case of long-standing rulers: where African leaders have managed to circumvent term limits, they have almost consistently won third (or fourth)-term elections (the two exceptions are Abdoulaye Wade in Senegal and Yahya Jammeh who ran for additional terms but were defeated through the polls). Because the power of incumbency is so strong in Africa, thereby creating an uneven political playing field, decisions by leaders to agree to step down after the end of their constitutional term is a more important factor for democratisation trends than the formal holding of elections.

Consequences of the disappearance of long-standing rulers

Looking ahead, a significant development over the coming decade will be the disappearance of a host of these long-standing rulers as many of them are ageing: 10 out of the 14 current long-standing rulers are aged between 65 and 92 years. It is therefore likely that most of them will step down or pass away over the coming decade. This may lead to shifts in the political governance landscape in these countries by creating opportunities for political pluralism and the emergence of a new political class. In principle, where elections are organised following the disappearance of a long-standing ruler, there are also greater opportunities for the opposition to make significant electoral gains – on average, opposition parties in Africa tend to fare better in open seat polls than in incumbent elections.

Past experiences, in Africa and beyond, however suggest that when an authoritarian long-standing leader dies in office or initiates a transition by stepping down, democratisation is not a foregone outcome. Instead, the most common trajectory is a persistence of the *status quo* as the transition is internally managed by the ruling elite, even in instances where the latter is divided among rival factions. Even where the disappearance of a long-standing ruler is followed by the organisation of elections and has led to some initial political opening, this has tended to be short-lived and not produce substantive changes to the regime in question. One important caveat though is that opportunities for long-term political change following the disappearance of a long-standing ruler are somewhat higher in dominant-party regimes such as Angola and Sudan than in personalistic regimes such as Eritrea and Equatorial Guinea, as well as in instances where the ruler is removed through popular protests (as happened recently in Burkina Faso) rather than following a ‘death in office’ or an internally-orchestrated succession of power. Dominant-party regimes are also less likely than personalistic regimes to experience familial successions after the disappearance of a long-standing ruler. Historically such dynastic transitions (outside of monarchies) have, in fact, been rare in Africa. Political family dynasties are present in various countries and eight African countries have seen sons of former presidents rising to the highest office, but there have only been four instances of immediate successions (DRC, Gabon, Togo and Djibouti – the latter was a transmission of power from uncle to nephew).

Figure 4: African long-standing rulers since independence



Data: Archigos

Since dominant-party regimes and authoritarian multiparty regimes are becoming more prevalent than personalistic regimes in Africa, this raises the prospect that the disappearance of several long-standing rulers over the coming decade will offer greater opportunities for democratic change than has been the case in the past.

The disappearance of a long-standing ruler may raise concerns that it will heighten political instability or provoke an escalation of violence if it leads to the collapse of the authoritarian regime. Concern with the latter is particularly prevalent since in many countries no succession plans are in place (a notable recent exception is Angola). Moreover, in those countries where the long-standing ruler is a 'liberation leader' (Angola, Eritrea, Rwanda, Uganda, Zimbabwe) there is also great uncertainty about the extent to which the successor will be able to garner the same level of legitimacy and authority that has so far guaranteed regime cohesion and stability.

Drawing from past experiences, the disappearance of long-standing rulers has, on average, not been accompanied by a breakdown in law and order or a descent into violence. A notable trend in Africa since the 1990s, and which is likely to continue in the near future, is that successions following the disappearance of a long-standing ruler increasingly occur in line with constitutional provisions and are followed by elections, while non-constitutional successions such as coups or appointments by the military or Cabinet have become less common. Instances where the disappearance of a long-standing ruler was a trigger factor in the outbreak of violent conflict have also been rare.

Looking ahead though, it is possible to identify several factors that will place some countries at higher risk of political instability and violence when confronting succession challenges. First, countries with no clear constitutional provisions on succession or those where constitutional provisions have been sidestepped or hollowed out by the current ruler will be at increased risk of instability. Second, personalistic regimes or those countries with very weakly institutionalised ruling parties will likely be less resilient in managing a peaceful transition after the disappearance of a long-standing ruler. Lastly, countries with recent experience of armed conflict or popular protests will also be at higher risk of post-succession instability and violence. On this basis, it is possible to conjecture that some of the countries currently at highest risk of violent breakdown if their long-standing ruler disappears include Cameroon, Chad, the DRC and the Republic of Congo.

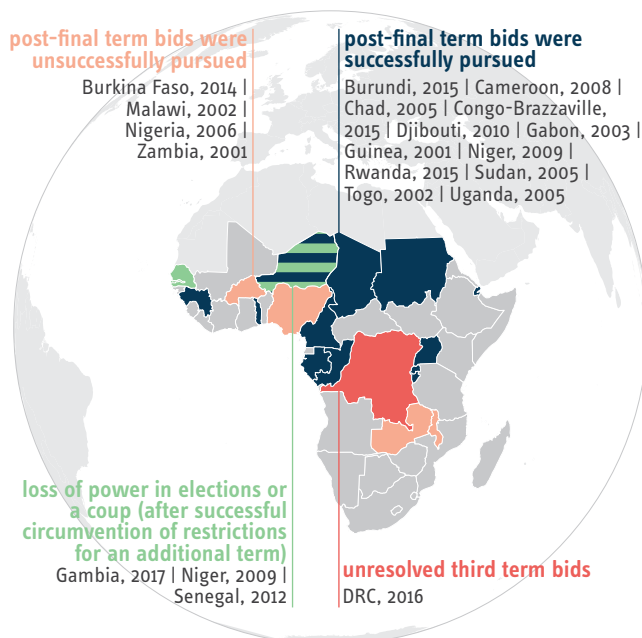
Beyond the impact that the disappearance of a substantial group of long-standing rulers will have in the countries in question, it is also worth considering the effects this might have at regional level. The emergence of less entrenched heads of state, and in particular the waning influence of 'liberation leaders', could positively impact the willingness and ability of regional and sub-regional organisations on the continent to promote good governance and rule of law. Organisations such as the African Union (AU) and the Economic Community of West African States (ECOWAS) have developed normative frameworks banning unconstitutional changes of power and

recent interventions by ECOWAS in response to political crises in Burkina Faso, Gambia and Niger illustrate how regional organisations on the continent can play a central role in bringing effective pressure to bear on leaders who seek to cling to power or unconstitutionally seize power. However, enforcement of the norm has so far been unequal and particularly arduous in cases of leaders seeking unconstitutional term extensions. Where the disappearance of long-standing rulers leads to the emergence of more democratic leaders at the country-level, this can have a positive spill-over effect on (sub-)regional organisations' ability and willingness to promote good governance and rule of law (a process already at play in the case of ECOWAS).

Looking ahead, it is unlikely that the phenomenon of long-standing rulers will completely disappear in Africa, even after the current cohort of ageing leaders leave power. Attempts by leaders to circumvent term limits have remained common, with nearly half of all incumbents who reached term limits since the 1990s trying to do so. Most were successful in bypassing term limits, as recently illustrated by Burundi and Rwanda. In Cameroon, Chad, Djibouti, Gabon, Togo, the Republic of Congo and Uganda, leaders simply scrapped existing constitutional term limits. At present, we are thus witnessing a roll-back which could pave the way for the emergence of new long-standing rulers over the coming decade. Two elements may, however, act as constraining factors to this trend: growing popular contestation of attempts by leaders to extend their stay in power and leaders' ongoing perceived need to organise elections in order to legitimise their rule.

Figure 5: Post-final term bids

Since 2000

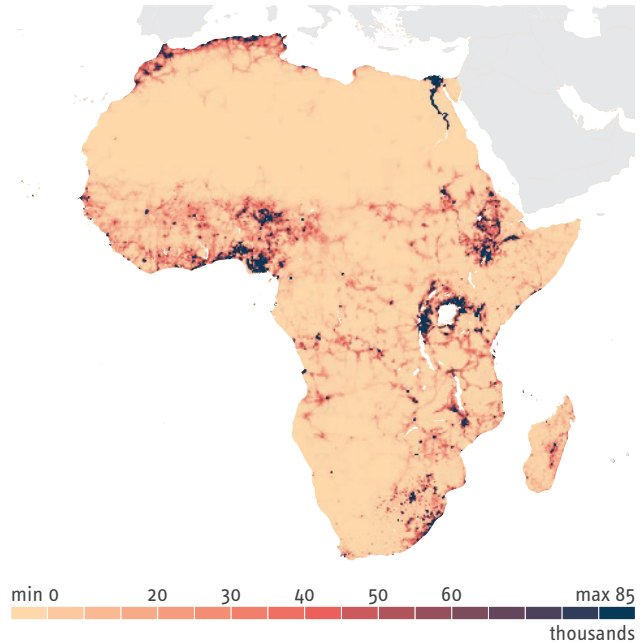


II. THE EXPANDING YOUTH BULGE

The most youthful and fastest growing population in the world is African. Africa is the second-largest and second most populated continent globally with an estimated population of 1.2 billion. Over 40% of Africans are under the age of 15, and 20% are between the ages of 15 and 24. By 2050, one third of the world's youth population will live in Africa: up from about one fifth in 2012. This growth will be uneven across the African continent with Southern and North African countries characterised by slowing or even negative youth population growth, while West, Central and East African countries will experience large youth population increases. Sub-Saharan Africa will have a considerably higher youth-to-population ratio over the

next 35 years, which highlights the need to prepare for an increasingly young labour force. Whether these young people will be able to successfully join the labour market will have significant implications for Africa and its neighbours.

Figure 6: Population density in Africa
2000



Data: United Nations Environment Programme (2000) 'Africa Population Distribution Database: 2000 Population Density', [Accessed 5 September 2017] <https://na.unep.net/siouxfalls/datasets/datalist.php>

A demographic time bomb?

Africa looks to be at the start of a demographic transition. Advances in healthcare and well-being have led to increased life expectancy and improvements in infant and child mortality rates in particular. Fertility rates are also projected to fall as socio-economic well-being increases, but following a time lag. The result is an interim period of rapid population growth, characterised as a 'youth bulge'. While there are considerable variations across the continent, Africa will continue to have a young workforce for this century. This underlines the need to have a good understanding of how young job-seekers engage with labour markets.

Many African countries are also currently undergoing a period of rapid urbanisation. Again there is variation, with many of the Southern and North African countries already having an urban majority while other countries (especially in Eastern Africa) still have relatively low urbanisation rates. Standard models of urbanisation based on the industrialisation of cities do not fit African trends. African countries are urbanising at much lower income levels relative to both East Asia and Latin America, while also experiencing declining levels of manufacturing and low levels of infrastructure investment. Africa also has a larger number of smaller secondary cities than other regions (less than 500,000 people) but these are often disconnected and productively inefficient. Will Africa's burgeoning young population and the linked phenomenon of rapid urbanisation constitute an opportunity or a ticking, demographic and urban time-bomb?

The 'youth bulge' may be concentrated in West, Central, and East Africa, but young people in North and Southern Africa continue to face high levels of low-wage temporary jobs that compound their poverty and sense of inequality. Urban areas have much higher rates of unemployment than rural areas although they can also generate faster economic growth. Despite relatively rapid economic growth, inadequate job creation for a 'youth bulge' of

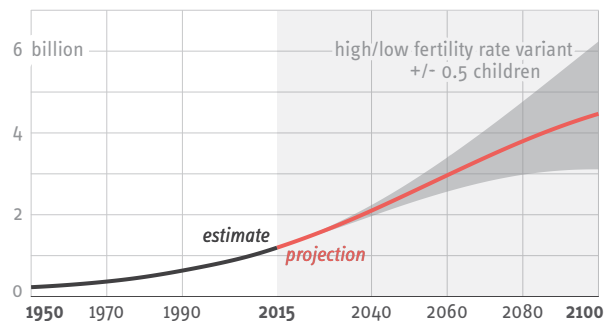
Africans with few skills relevant to the labour market and an underperforming educational system has failed to prepare young people for existing jobs. There is also a significant gender discrepancy emerging as young women tend to enter marriage early and withdraw from the labour force and focus on rearing a family. Africa's widespread youth unemployment threatens to undermine social and political stability and means that young people are particularly vulnerable to radicalisation.

It is not however certain that this 'youth bulge' will lead to a wave of rebellion and revolution. Countries that experienced revolts in the Arab Spring of 2011 – Egypt, Tunisia and Libya – all had large youth bulges but others in the region such as in Western and Central Africa have even larger youth bulges but did not experience revolution. A large youth bulge certainly raises the risks of political turmoil but it is only likely to trigger political rebellion and revolution when coupled with other drivers of heightened inequality and political exclusion.

Education is a challenge closely linked to the youth bulge. In Northern and Southern Africa there has been 'an obvious and growing quantitative overproduction of higher

Figure 7: Total African population

Past estimate and future projections



Data: UN DESA/Population Division.

education graduates compared to what the labour market can absorb' according to the African Development Bank. Governments have increased the number of higher education providers but not focused on the educational curricula and the needs and realities of the productive sectors of the economy. Encouragement of self-employment and SMEs through business development training and skills upgrading could help, but also access to microfinance services and empowerment programmes for women. The Arab Spring of 2011 was predictable. Then African Development Bank president, Donald Kaberuka, observed in June 2008: 'The disconnection between higher learning institutions and the private sector has created the twin problems of high youth unemployment and a shortage of middle to high skills, while in some cases, highly trained individuals lack jobs. For example, in Tunisia with an unemployment rate of around 14 percent, more than 40 percent of university graduates remain unemployed.'

Economic and social challenges

African countries have the potential to reap their demographic dividend but taking advantage of the opportunity depends on an enabling policy environment that includes aiming at reducing fertility rates and relevant skills development, regional markets and circular migration. Many African economies will not create enough formal jobs to absorb many of the new youth entrants to the labour market. This means that it is their informal sectors that will have to absorb more young people and that for many economies the informal sector is set to become the 'new normal' over the next decade.

African economies are heterogeneous with varying demographic profiles, economic structures and youth development policies. Youth policies will need to be context-specific for them to achieve timely and sustainable outcomes. The export of labour will increasingly also be part of African calculations to manage the 'youth bulge'. Given the limited capacities of African economies over coming decades to formally absorb educated youth, labour migration both inside Africa and externally will become much more regular. Currently around 80% of African migration happens within the continent and extra-continental migration from Africa is low by international standards. But external migration has accelerated in recent years and is set to increase further – especially from West Africa, the Horn of Africa and to some extent East Africa. It must be seen as part of the solution to Africa's youth unemployment. African countries will need to formalise and regulate overseas employment of their young populations and some of their surplus labour. Governments will need to think through circular migration models that do not just allow for brain drain and cherry picking of Africa's best, but are designed to provide mutually beneficial arrangements. If executed appropriately such policies could boost public and private demand for youth labour and assist in skills flowing freely across Africa and globally. If ignored, as African countries get more prosperous and young people's

expectations of a better life increase, more illicit migration across the Mediterranean to Europe and beyond will occur.

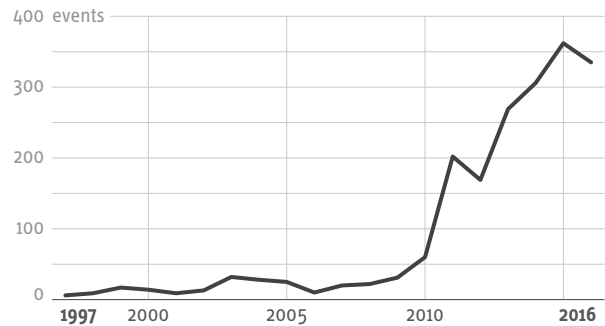
Integrating African youth into the labour market with decent and productive jobs remains a huge challenge that needs regional and international partnership. The African Union’s Continental Agenda 2063 calls for action to support young people as drivers of Africa’s renaissance. This is to be achieved through investment in their health, education, and access to technology, capital, and opportunities. Concerted strategies to combat youth unemployment and underemployment are needed at national and continental levels. Despite the ambitious plans by the African Union (AU) for young people, African government policies are often not youth-centred and international partners are frequently under-informed. African governments have tended to respond with poorly targeted interventions that were neither coordinated nor sustainable. Many programmes have been tainted by corruption or other poor governance practices. As highlighted in the chapter of this Report devoted to economic issues, the formal economy cannot fully absorb Africa’s young work-seeking population and with changing labour demands, it remains to be seen if African economies can become globally competitive.

Avoiding a simple ‘youth bulge and instability’ thesis is important as it leads to distorted assessments of everyday realities. Research shows that although the size of the youth population (particularly the group aged fifteen to nineteen) raises the risk of low-intensity conflict, this is easily mitigated through employment opportunities and other pathways of socio-cultural integration that allow young people achieve adulthood in their societies. In a world where young people strive to gain recognition as adult contributors to society, the power of cultural judgment to impact on young lives must not be overlooked.

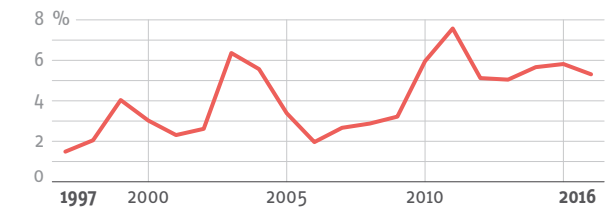
The ‘youth bulge’ is seen as a threat because there will be an increase in the number of ‘vulnerable’ citizens between

Figure 8: Riots/protests in Africa

Involving youth



Riots involving youth as percentage of total riots/protests



Data: Armed Conflict Location & Event Data Project.

the age of 15-20. Existing social cleavages may be amplified by the increase in this cohort, especially current issues of youth marginalisation and frustration. The increased number of young people may also lead to new cleavages emerging, and this is causing uncertainty. While the majority of these people may have a low propensity for violence, increased numbers of marginalised youth will provide a recruitment pool for existing violent groups, or may lead to formations of new clusters or groups of disruptors – i.e. small groups with the ability to cause large-scale economic/social/political disruption.

Urban concentration in conjunction with a lagging economy also spells trouble unless better governance, a drive to reduce corruption and a concerted effort to improve opportunities for young people are undertaken. Economic opportunities in particular need to be made more accessible and not just for those who have advantageous political or family connections. Education also needs to be reformed and redesigned to be relevant for the economic needs of countries, regions and international markets.

The Arab uprisings of 2011 were youth-led, and emerged from a combination of factors including rapid growth in access to higher education, high levels of graduate unemployment, rapid urbanisation and intransigent regimes. Over the next twenty years, increasingly parts of Sub-Saharan Africa will replicate these conditions but this does not necessarily mean that the Arab Spring uprisings of 2011 will be repeated. It does suggest however that going forward there will be continued increasing levels of protest in Sub-Saharan Africa that will not lead to regime change, but will continue to cause disruptions. The next two decades will be a critical juncture for Africa. Working out how to harness this ‘youth bulge’ to create sustainable and equitable growth is the key immediate policy challenge.

III. RESOURCE DEPLETION AND LAND PRESSURES

Africa is rich in natural resources of all types, with sufficient water, land, minerals and energy sources to meet all of the continent's needs in the decades to come. However, it is an open question whether these resources will be developed sustainably, or whether the employment and economic benefits that they can provide will be equitably distributed. While Africa as a whole still benefits from large amounts of arable land and freshwater per capita (relative to East Asia, South Asia or the European Union), this is highly variable across the continent, and in many regions current trends of increasing resource exploitation will soon become unsustainable, with consequences not only for the environment and the natural resource base, but for the quality of life of African citizens. Achieving a sustainable balance will be particularly difficult in the years ahead given the continent's rapidly increasing population and the fact that actions to address the highest priority issues, economic development and poverty reduction, too infrequently integrate efforts toward sustainable resource use and environmental protection. While future improvements in technology, resource governance and demographic trends can help change the narrative, it is likely that many of Africa's natural resources will be exploited at less and less sustainable rates in the short to medium term.

As in other parts of the world, natural resources in Africa are important both for meeting domestic needs as well as for earning income through exports. From 2000 to 2014, many African countries benefited from the commodities 'super cycle' that pushed up the global prices of a wide range of natural resources. Driven primarily by booming demand from rapidly developing economies, especially China, commodity indices, from metals to oil to agricultural commodities, peaked in 2008 and, after falling during the global financial crisis, were pushing towards record highs again in 2011. With the end of the super cycle, prices of some commodities, such as food, have eased off gradually, while others, such as oil, have plunged drastically. The super cycle provided resource-exporting countries with an opportunity to earn a major windfall, while the end of the boom meant relief for resource-poor importing countries, but a potential economic hangover for exporters.

Changing investment in the resource sector

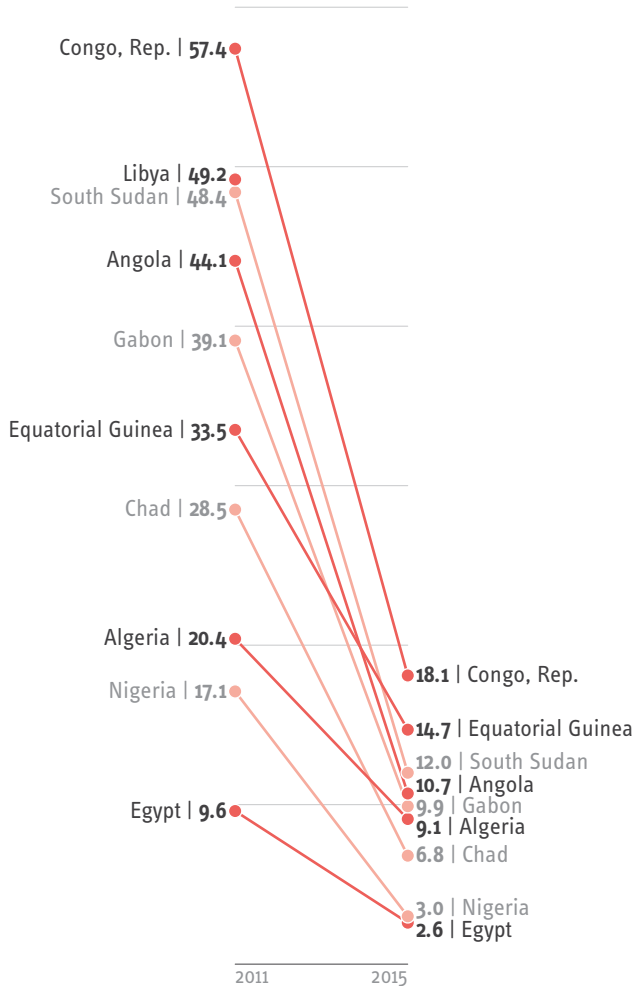
The end of the boom is reflected in dropping foreign direct investment (FDI) in Africa, which dropped in absolute terms every year from 2012 to 2016, as well as in relative terms, from 5.4% of total global FDI in 2014 to 3.4% in 2016. Private estimates of planned capital investment in the oil and gas sector, for example, indicate a drop of as much as US\$100 billion from 2016 to 2020. Changing capital investment trends also portend a potential drop in long-term oil production, including in traditional exporters Nigeria and Angola, but increases in gas production, including in new producers such as Mozambique and Tanzania. While gas has historically

been less lucrative than oil, as the world decarbonises throughout this century due to climate change, this balance of pricing may shift away from dirtier oil and towards cleaner gas. In addition, natural gas can far more easily be used to produce electricity, for which domestic demand is increasing rapidly.

Notably, though, as investment in the resource sector has shrunk, the investment dollars that are entering Africa are increasingly weighted towards the manufacturing and services sectors; in 2016 for example, announced greenfield FDI projects for primary resource sectors accounted for barely one twentieth of the announced value of projects in service sectors, including utilities, construction, transport, storage, communications, and business services.

International investments can be a mixed blessing, however, notably with regard to the lease or purchase of land for agricultural production, often derisively labelled as ‘land grabs.’ The trend of African land grabs really took hold during the period of high food prices from 2008 to 2011, but foreign buyers continue to buy agricultural lands, even after the price surge abated. Data from the Land Matrix Initiative shows that many deals that were announced earlier have failed to materialise, but many that remain are under contract and in production. Africa accounts for 42% of global deals,

Figure 9: The end of the oil boom
Oil rents as % of GDP



Data: World Bank
<https://data.worldbank.org/indicator/NY.GDP.PETR.RT.ZS>

totalling 10 million hectares (or 1% of Africa's total agricultural land).¹ The purchase of land by foreign owners can contribute to increased competition for land and potential conflicts with the local population, particularly when deals are made with little transparency or engagement from local stakeholders. Large-scale foreign investments may help improve productivity and employ newer technology, but can also disrupt agricultural labour markets and contribute to problems of monocropping without necessarily improving local development.

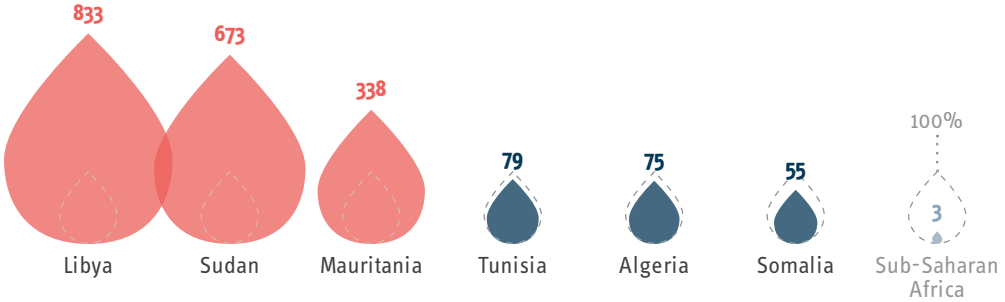
Issues of sustainability

In recent years, demand for natural resources of all types is increasingly coming from Africa itself. This is particularly true for renewable resources such as water and land due to the impacts of demographic and economic growth. As growing numbers of households climb the development ladder, their ecological footprint increases due to improved diets, a higher level of general consumption and increased use of electricity and other energy sources.

The World Bank estimates that most African countries are not currently overstressing their domestic freshwater resources; on average, African countries use around 2% of their renewable resources, which is well below the global average of 5%. However, the continental average masks the fact that a number of countries in North and East Africa are overexploiting their freshwater resources (notably Egypt, Libya, Tunisia, Algeria, Mauritania, Sudan and Somalia). Rapid population growth, an already arid climate, overdrawn aquifers, and poor water management increase water scarcity across these countries and others in North Africa and the Sahel. Lake Chad, for example, once covered 25,000 km² and provided water and livelihoods for people in four countries, but has shrunk by an estimated 90% in the last 50 years and may soon disappear altogether, with water diversion by humans and changing weather patterns both contributing to the problem. As this surface water dries up, trends toward increased pumping of groundwater across the Sahel will likely increase. Examples of massive over-pumping abound around the world, from the US to Egypt, from India to the Maghreb states, suggesting that the sustainable use of groundwater resources is rarely pursued before the problem nears crisis levels. And even for countries that appear to be doing better, national data may hide sub-national problems in places such as northern Nigeria. In addition, the expected impacts of rapid demographic and economic growth, along with the uncertainties of a changing climate – that will have a stronger impact in Africa than elsewhere – mean that the balance of freshwater supply and demand is likely to be problematic in an increasing number of African regions in the years ahead.

1. Kerstin Nolte, Wytse Chamberlain, and Markus Giger, 'International Land Deals for Agriculture. Fresh insights from the Land Matrix: Analytical Report II', Bern, Montpellier, Hamburg, Pretoria: Centre for Development and Environment, University of Bern; Centre de coopération internationale en recherche agronomique pour le développement; German Institute of Global and Area Studies; University of Pretoria (Bern Open Publishing, 2016).

Figure 10: Total annual freshwater withdrawals
% of internal resources



Data: World Development Indicators (World Bank)

Africa's water challenges are not limited to the freshwater variety. Pollution and overfishing off Africa's coasts is becoming increasingly common for the same reasons as found elsewhere in the world: unregulated and destructive overfishing (by both local and international fleets), increasing pollution and agricultural run-off, and the impacts of climate change on water temperature and acidity. Without cutting back on overfishing, regulating international fleets, and improving the management of aquatic and marine resources, not only might millions of livelihoods be affected, threatening the food security of millions more, but whole ecosystems may be disrupted, never to recover. African waters do not yet face the same overfishing challenges as those of East Asia, for example, but the trends are in that direction – and the two regions are connected. With much of the coast of China already overfished, thousands of Chinese trawlers fish further abroad, with West Africa being the favourite location; one estimate suggests that Chinese boats alone cost West African economies \$2 billion each year.

Moving inland, almost 26% of the land area in Sub-Saharan Africa was covered in forest in 2014 (compared with 38% of the EU and 34% in the US). Interestingly, forest cover has actually increased in many developed regions, including the US and across the EU, as changes in agricultural production and rural populations have reduced pressures to farm marginal-quality lands. In Africa, however, with rural populations booming and too few economic opportunities outside of agriculture, forest cover is likely to continue to drop in the decades ahead. Expansion of agriculture and settlements, illegal logging, extraction of wood for firewood and charcoal, and uncontrolled bush fires pose serious threats to forests.

Agriculture matters

But while forests and fisheries are big business, agriculture is still the dominant sector for employment and food security in Africa. In 2014, approximately 42% of

Sub-Saharan African land was devoted to agriculture, compared with 38% globally, 57% in South Asia and 45% in the US. Nearly half of the world's remaining uncultivated land (that is suitable for agriculture) is in Sub-Saharan Africa. The years ahead will see increasing pressures to bring more of this into production, squeezing out the space available for other species to survive. Trends in agriculture are especially important given that more than 60% of people in Sub-Saharan Africa live in rural areas, as compared with 46% globally, and 25% in the EU. Thus, while urbanisation is progressing rapidly in Africa, a huge portion of its population will still be rural for decades to come.

Africa's food and beverage markets are predicted to be worth \$1 trillion by 2030. But African cereal yields are barely half of the global average. This low productivity is detrimental to efforts at improving rural livelihoods, ensuring food security, and competing with exporters from elsewhere. The African Development Bank (AFDB) estimates that net food imports are expected to grow from US\$35 billion in 2015 to over US\$110 billion by 2025. The balance of imports vs. domestic production is a delicate one across much of the continent as countries seek to improve their food security without relying too much on external sources. In 2016, the Food and Agricultural Organisation (FAO) noted that on aggregate, Sub-Saharan Africa achieved adequate food availability over the 2014–2016 period, although this conclusion clearly masks the crisis in South Sudan and the ongoing challenges in other regions to improve food security. Domestic food production will continue to be the biggest driver of changes in land use.

In such a context, in which poverty reduction and improving food security are high on government agendas, the land grabs discussed above are quite rightly the subject of controversy. However, the problems raised by these foreign-led projects are also often very relevant for the 99% of African agricultural land that is not affected by foreign land grabs, including security of land tenure and other land ownership issues, infrastructure and transport bottlenecks for producers, the rapid expansion of agriculture into marginal lands and once-forested areas, and the wider challenge of transparency and responsiveness by governments making policy or cutting deals with investors. Additionally, in a continent with a massive agricultural labour population, improvements in agricultural productivity may not lead to more or better jobs – improved agricultural productivity elsewhere in the world has not generally generated more rural jobs – rather the opposite, particularly where mechanised farming takes place.

Land ownership and land use issues will continue to be an enormous challenge, not just ecologically, but politically and in terms of security challenges. Many African countries have incomplete land tenure laws that are poorly enforced. This impedes the efforts of farmers to use their lands as collateral for accessing credit, investing in new technologies, irrigation systems, crop types, storage facilities and transport options for bringing their crops to market. In addition, although women are the primary agricultural workers in much of Africa, they often face formidable obstacles

in terms of land ownership and access to markets, which represents a major obstacle not only for them, but for the entire agricultural sector.

The decades to come will see significant changes in agriculture, not least due to the impacts of climate change. While temperatures are rising globally, the regions of the globe will be affected differently; Africa is expected to heat at a quicker rate than the global average, and experience greater impacts on weather and rainfall. These impacts are likely to increase water stress and the frequency of heatwaves, with subsequent consequences for livelihoods and food security. Because of Africa's relatively low climate resilience, with populations and economies highly dependent on rain-fed agriculture, there is real potential for negative social, economic and political consequences.

Towards sustainable resource governance

Changing weather and land use in Africa are also likely to cause significant problems for the continent's biodiversity and ecosystems. The Stockholm Resilience Centre has identified nine planetary boundaries, beyond which there is a risk of abrupt and irreversible environmental change. Notably, two of the boundaries, biosphere integrity and land-system change, are in the spotlight in Africa. Scientists recently sampled 27,600 terrestrial vertebrate species and showed an 'extremely high degree of population decay' in vertebrates, including in common species that were previously considered of low concern. The African lion, for example, is still relatively common and visible in the wild, yet populations have dropped 43% in less than 25 years. The prognosis for the next 25 years is not good, given that the pace of human population growth and agricultural land expansion is higher in Africa than anywhere else on earth.

Increasing pressure on renewable resources across Africa will create both ecological and socioeconomic stresses. As has occurred during development processes elsewhere (most rapidly and recently in China), and as is already evident across much of Africa, it is likely that in many cases, these stresses will be seen as relatively acceptable by governments, as well as by much of the population as long as economic development proceeds rapidly.

According to the Ibrahim Index of African Governance, overall governance scores have evolved positively over the last decade, but in breaking down the numbers, it is unclear whether the positive trend will continue in the years ahead. For example, almost four fifths of African citizens live in countries that improved in terms of political participation and human rights in the decade to 2016, but over the same period, scores for corruption and bureaucracy declined in 33 African countries. This does not bode well for the transparency and corruption challenges that are so important for effective resource management.

Too often, efforts to prioritise ‘sustainable development’ and ‘green growth’ are dismissed as disconnected from the economic priorities of populations and political priorities of governments. It is an open question whether national governments will integrate environmental and climate issues into their plans for economic growth, infrastructure expansion or agricultural development. And where governments do attempt to pursue sustainable development, they will need the capacity to ensure that these policies translate from paper to the real world. From illegal oil production and refining to illicit fishing offshore, governments seeking to shepherd their resources will face many challenges. It does not appear likely that Africa will choose a more sustainable path of resource development than the rest of the world has, preferring to pursue economic development as quickly as possible first, and clean up a bit later. But this might change, depending on three factors, each of which will vary greatly across the continent.

The first factor is the **pace of global technological change** – how quickly greener energy, transportation and manufacturing technologies become available at affordable prices. In terms of efficient resource uses, there are a wide range of technologies such as drip irrigation for dry areas, local solar power for regions unserved by electrical grids, or hybrid vehicles which require less petrol that could greatly improve the efficiency of resource use, were they available at more affordable prices. With increasing global focus by both private and public sectors on improved resource efficiency, it seems likely that some technologies will indeed continue to plummet in price and increase in availability. While nuclear, fuel cells, Carbon Capture and Storage (CCS) and cold fusion technologies have not (and perhaps never will) become more widely affordable, other technologies will make rapid gains, providing ‘leapfrogging’ opportunities that will allow developing nations to avoid some of the sustainability and pollution errors of other developed regions. One important opportunity for such leapfrogging in the next decade may be in the development of solar power in the place of dirty coal-burning plants across the continent.

The second factor will be the **demographic trends** highlighted elsewhere in this Report. Even if green technology spreads quickly and governments enact and enforce good policies, if domestic demand grow too quickly, then positive change will be very difficult.

The third factor will be the **evolution of resource governance** – both how quickly overall national governance capacities improve (can the state create and enforce the necessary regulations and sustainable development processes?), as well as how quickly environmental issues and sustainability concerns become real priorities for citizens and governments. An important indicator for the evolution of Africa’s natural resource sector will be the differences between the existing oil and gas producers, Nigeria, Algeria and Angola, each afflicted by the ‘resource curse’, and the newer producers from Ghana to Tanzania to Mozambique, which will be challenged to develop environmentally-sustainable production that provides good jobs, while making wise use of export income to invest in key sectors that benefit the population

and that can assist with long-term diversification of the economy. Pressures from increasingly demanding populations will likely ensure that natural resources governance will be among the sectors under the microscope as government accountability issues move to the fore across the region.

IV. DIVERGING PATTERNS OF GROWTH AND INEQUALITY

Predictions of Africa's economic growth swing back and forth from the 'Africa Rising' narrative, to that of 'Africa Declining'. For a heterogeneous continent of 54 countries, including 48 countries in Sub-Saharan Africa, such slogans fail to capture the complexity of Africa's economic landscape. A closer examination of the economic growth projections shows an Africa that is neither rising nor falling, but an Africa diverging over the next 20 years – with clusters of African states performing at different paces and with differing patterns of inequality.

In theory, Africa's outlook is positive: currently at around 1.2 billion, Africa's population will rise to 1.7 billion in 2030 and around 2.5 billion in 2050 – but in order to reap the benefits of the 'youth bulge' the labour pool needs to have access to jobs. If the jobs do not materialise, the results can be highly destabilising. Africa's economic performance, expressed in terms of growth in GDP per capita, is under half that of the South Asian economies, while Africa has over double the number of unemployed.

Sub-Saharan Africa remains on the margins of the world economy, accounting for about 3% of global trade, hosting 34 of the world's 48 least developed countries and handicapped by a lack of competitiveness or economic diversification. Many African countries remain highly dependent on rain-fed agriculture and commodity exports and are vulnerable to external shocks, either due to commodity market price swings or severe climate fluctuations – as droughts in Southern Africa and the Horn of Africa remind us.

Although GDP growth on the continent slowed from an average of 5.5% (2000-10) to 3.3% (2010-15), if you subtract the performance of much of North Africa and Africa's oil exporters, Africa is still projected to be the second-fastest region for economic growth in the coming years. A growing average debt to GDP ratio, up from 40% in 2011 to 50% in 2015, is also worrying. The problem for many African governments is affordability: a number have borrowed recklessly and are now under financial stress.

Disparities in wealth distribution

Poverty will continue to decline in many parts of Africa in the coming decades but the 2017 *Africa Wealth Report* demonstrates the growing variability of wealth distribution in Africa. In 2016 Mauritians were the wealthiest individuals in Africa and Zimbabweans the poorest. According to the report, the wealth of an average Mauritian was US\$25,700 in 2016 – up by 20% on the 2015 figure (although the global

average is US\$27,000). South Africa, Namibia, Botswana, Angola, Algeria and Kenya followed in the top ten. At the bottom of the table were citizens in Mozambique, Ethiopia, the Democratic Republic of the Congo (DRC) and Zimbabwe – all with a level of less than \$US1,000. Zimbabwe was one of Africa’s wealthiest countries in 2000 but illustrated the damage that poor governance can inflict on an economy by undermining local wealth creation and investment. Côte d’Ivoire in contrast has bounced back since its conflict ended in 2011, attracting new investment and making the top ten of the *Africa Wealth Report* – a reminder that an enabling business environment coupled with skilled labour and better governance can turn things around for African states.

The number of high-net-worth individuals is also increasing in Africa – Mauritius with its offshore banking sector saw an increase of 230% in 2016, while Ethiopia ranked in second place and Rwanda came third. It is important to recognise that both Ethiopia and Rwanda graduated from a low base. A growing number of higher-income households – representing 6% of Africa’s population and 24 % of its consumer spending – will be active by 2025 but it remains to be seen if they significantly contribute to growing their economies. The pattern up to now has been that Sub-Saharan Africa has among the highest levels of inequality – both in terms of income and gender – in the world, even after accounting for the lower levels of per capita income in the region. Such inequality impedes macroeconomic stability and growth. Sadly, over the last 15 years of high growth in Sub-Saharan Africa although there was a small decline in the level of gender inequality, income inequality has remained broadly unchanged.

Sub-Saharan Africa faces particular challenges when it comes to tackling growth and inequality together and registers a higher level of inequality when compared with economies in the rest of the developing world. However, if seven high inequality ‘African Outliers’ – Angola, the Central African Republic, Botswana, Zambia, Namibia, Comoros and South Africa – are excluded, Africa’s level of inequality actually approximates those of other developing economies.

Poverty, slow economic growth, and unequal income and wealth distribution will remain endemic in many African countries over the coming decades. Indeed, among the developing regions of the world Africa has made the least progress in improving living standards. Poor economic performance is not limited to resource-poor countries such as Niger and Mali; it is also a feature of resource-rich countries such as Angola and Nigeria. Moreover, poor economic performance co-exists with widespread corruption.

Economic and governance challenges

Africa needs investment. But while Africa comprises 15% of the world’s population it only receives around 4.4% of total foreign direct investment (FDI), some \$50-55

billion. Expatriate Africans also send home around \$40 billion in remittances a year. But these inflows are still eclipsed by capital flight – especially in resource-rich economies. Data shows that ordinary Africans invest in Africa, while the very richest Africans, rather too frequently, do not.

In addition, business will not flourish under poor governance. Likewise, state-building is tied to business, via the key linkage of tax – which is central to the social contract between people and their government, and a driver of accountability. But in much of Africa, governments only raise low volumes of tax. Improvements in governance will bolster business and consumer confidence in governments, and diminish perceptions that they are predatory. This is also a reminder that FDI into Africa appears to have become more selective than during the boom years and investments have fallen from a peak of 27% of GDP in 2005 to 16% in 2015.

Clearly many African governments are handicapped because they have a small tax revenue base. In many cases, those revenues are dominated by resource rents that in themselves are impacted by commodity price volatility. Clearly any attempt to finance or stimulate business growth in Africa must be shaped by a deep understanding of the specific national and regional context. But there are a number of common constraints to business, particularly limited access to mid-scale finance for small and medium-sized enterprises (SMEs), poor infrastructure, especially electricity and roads, a shortage of skilled labour, and corruption.

Poor governance and capture of economic resources by elites have blighted inclusive growth and thwarted poverty reduction in many Sub-Saharan African countries. A few African countries such as Ethiopia and Rwanda have tried to replicate the Asian developmental state or hard state model with some success. It is unlikely that many other Sub-Saharan African countries will closely follow this path over the coming decade and both Ethiopia and Rwanda's economies will increasingly face challenges as other more open societies become more competitive.

Growth on its own is not enough – economic diversity and higher rates of formal employment are key for developing better governance. So how will African states create the necessary economies of scale and generate that urgently needed inclusive growth? There is no single answer to this. Africa's immense cultural and political variability ensures that the solutions need to be regional, local and global. The current economic woes of South Africa, Nigeria and Mozambique are not just about lower commodity prices but also about policy mismanagement. Trade with emerging economies rose steadily from 2000 but this has now levelled out, mostly due to the Chinese rebalancing their economy. Other economic powers, such as India, may step in, but the peaks in commodity prices experienced in recent years are unlikely to be replicated any time soon.

The export of natural resources will still play an important role in Africa's economic future over the coming decades. The continent has 60% of the world's

unutilised croplands but also contains the world's largest reserves of vanadium, diamonds, manganese, phosphate, platinum, cobalt, aluminium, chromium and gold. Although declining, 10% of global oil exports come from Africa and new gas discoveries mean that the continent is increasingly the focus of international partnerships. 9% of the world's reserves of copper and 5% of iron ore are also located in Africa. Only a fraction of what has been discovered has been extracted and as commodity prices strengthen new investments in exploration and production will take place over the next decade.

Although the risk appetite of investors in Africa has declined, some still see long-term opportunities there. By 2034, Africa is expected to have a larger workforce than China and India. It also will have the fastest rate of urbanisation in the world – it is forecast that an additional 187 million people will be living in urban centres by 2025. Between 2015 and 2045 African cities will gain an average of 24 million more people each year (compared to 11 million in India and 9 million in China).

Pillars of growth and pools of poverty

Urbanisation brings with it significant challenges but it also provides opportunities. There will be dramatic increases in demand for housing and better urban infrastructure. Studies from elsewhere show that urban areas can generate higher productivity and real GDP growth – twice the production of rural areas in theory. This could occur in Africa with the right policy frameworks. Certainly Ethiopia has invested in industrial parks and new urban infrastructure to create jobs and boost exports and internal consumption. Household consumption and spending is growing and could reach \$5.6 trillion by 2025 according to McKinsey Global Institute. Some 60% of this growth would be from an expanding population, up 3.8% to \$2.1 billion – half from East Africa, Egypt and Nigeria. By 2025, 15% of growth in Africa's consumer spending will be in Nigeria, with consumption concentrated in a pool of some 75 cities across Africa. An economic pattern of pillars of growth, surrounded by pools of poverty, seems likely.

Despite all the hype and some optimism in Ethiopia elicited by its development of industrial parks, one of the single biggest obstacles to scaling up Africa's economies is the continued underperformance in the African manufacturing sector. There is an ongoing debate as to whether African states can sustainably lift themselves out of poverty without industrialisation. Countries like Ghana and Kenya have shown how by embracing accelerating technological change – such as the internet and mobile telephony – they are trying to leap frog in technology. 50% of Africans should have smartphones by 2020 and electronic payment methods such as M-Pesa, e-commerce and Fintech have been shown to be innovative – even Zimbabwe has adopted e-payments to try and ameliorate its acute cash liquidity crisis. Better educated and technologically competent Africans should be able to take advantage of

emerging business clusters whose development will be encouraged by the surge in urbanisation over the coming decades.

Currently only 16% of Africa's exports are traded between African economies. Intra-regional trade has improved since the 1990s but could significantly grow. The Regional Economic Communities (RECs) could facilitate broader trade by integrating into more international value chains. This would require bringing down regional barriers and hurdles. African intra-regional trade currently costs 50% more than in East Asia.

A key trend over the next decade will be that profitability will be concentrated in sectors of the African economy that do not employ many low-skilled people. Upgrading skills through training can help, but as we have seen Africa mostly remains on the margins of the global economy and remains uncompetitive compared with many Asian economies. It also has to contend with an increasing number of low-skilled workers looking for employment over the next decade. Broadening the benefits of technological change to increase poverty reduction and inclusive growth will be the key challenge of the next decade for African governments. To effectively compete and generate dynamic economic growth, they will need to encourage further innovation and develop niche businesses while also catering for the needs of the less skilled.

Box 1: Cybersecurity in Africa

Technology adoption in Africa is on the rise: between 2005 and 2015 the number of internet users grew tenfold and Sub-Saharan Africa has been the world's fastest growing mobile region, with subscriber growth rates more than twice the global average. Over half of the population has mobile phones, and mobile device usage has grown over 350% in the last decade and is estimated to reach 725 million unique subscribers by 2020. With the ongoing digitalisation and growth of the e-commerce industry, cybercrime poses a growing risk. Cybersecurity experts estimate that 80% of personal computers on the African continent are infected with viruses and other malicious software. In South Africa, over 70% of adults experienced cybercrime in 2015, costing the South African economy US\$242 million. South Africa has the third-highest number of cybercrime victims in the world, after Russia and China. Three African countries – Somalia, Algeria and Rwanda – are also among the world top 20 countries with the highest number of computers infected by malware. Use of outdated or illegal software is also widespread. It is estimated that almost a quarter of users rely on the operating system Windows XP from 2001 for which software patches were discontinued in 2014. The 2016 BSA Global Software Survey found that 57% of software used in Africa and the Middle East is unlicensed, with some individual countries attaining rates well above the continental average (Côte d'Ivoire: 80%, Kenya: 76%, Nigeria: 80%, Zambia: 81%, Zimbabwe: 90%).

The growth of cybercrime is a global problem but some cyberthreats are more likely to impact Africa. One of them is mobile malware. With a high percentage of the population using mobile phones and Africa being a world leader in money transfers (14% of Africans receive money through this medium), mobile devices are one of the most lucrative targets for cybercriminals. 89% of mobile phones in Africa run on Android, and already one out of seven mobile devices in Nigeria is infected with mobile malware.

The main challenges in addressing the problem of cybersecurity are lack of awareness, lack of specialised training for both IT experts and law enforcement agencies and weak legal frameworks. According to the Africa Cyber Security Report 2016, more than 90% of Africans affected by cybercrime did not report cases of cybercrime to the police and in cases where they did report them no further action was taken. Lack of training and awareness among law enforcement and judicial officials makes the prosecution of cybercrime very difficult. Private companies and public institutions themselves also do not take care of the problem properly - 96% of organisations in Africa spend less than US\$5,000 annually on cybersecurity products. More than 80% of organisations manage their cybersecurity internally or do not have any cybersecurity management system. Where cybersecurity issues are managed internally, in many instances IT specialists lack skills or simply sufficient time because they are being given security responsibilities in addition to their everyday workload. For instance, in Tanzania it is estimated that the number of certified professionals dealing with IT security is just around 200. Yet internal capacities to manage cybersecurity are particularly important since the majority of cybercrime reported in Africa in 2016 was caused by insiders, i.e. company employees.

Awareness by African countries of the importance of creating an enabling environment for the prosecution of cyber criminals is growing. In 2015, Tanzania passed the Cybercrimes Act which facilitates the acceptance of electronic evidence in the prosecution of cyber criminals. But the problem of weak legal frameworks and poor implementation remains a key challenge. In June 2014, the African Union adopted the Convention of the African Union on Cybersecurity and the Protection of Personal Data. The only country where there is a comprehensive legislation regarding cybercrime, data protection, and established Computer Emergency Response Team (CERT) is Mauritius. In contrast, countries like Chad, Gabon or Guinea-Bissau have minimal or no cybersecurity legislation in place. Another issue is the lack of practical guidance from the government. Most existing legislations are simply copy-pasted and little understood by the local enforcement authorities, resulting in poor implementation.

Aleksandra Tor

V. A MULTI-LAYERED SECURITY ENVIRONMENT

Historically, Sub-Saharan Africa has carried a large part of the global conflict burden and continues to be a region prone to armed conflicts. Of these, the majority have been interstate wars and non-state armed conflicts. The region has also seen high levels of one-sided violence, meaning civilians have borne the brunt of armed conflicts on the continent. African conflicts have further been characterised by strong path dependency and the prevalence of repeat civil wars: many conflicts today stem from the accumulation of protracted conflicts from the past. There has been a marked decline in armed conflict in Sub-Saharan Africa since 2000, both in terms of conflict numbers and intensity and in terms of the number of conflict-related fatalities. Today, the continent is more peaceful than it has ever been in the post-independence era. However, since 2010 there has been an uptick in violence – although levels today remain lower than they were at their peak in the 1980s-1990s. In 2016, four of the ten most lethal conflicts in the world were situated in Africa (Nigeria, Somalia, Sudan, South Sudan) and Africa was the region with the second-highest number of new internally displaced persons as a result of violent conflict. The sub-regions that are most conflict-prone at present are East Africa and Central Africa, alongside a clustering of violence in two areas of West Africa (the Sahel and Lake Chad Basin). Despite the long-term trend of a decline in armed conflict, Africa will continue to be the theatre of armed conflict and violence, with the possibility of a further upsurge in violence over the short term.

Interlocking conflict dynamics

While conflict patterns and drivers are regionally diverse and differ from country to country, a key overarching pattern of armed conflict in Sub-Saharan Africa is the multi-layered nature of security environments. This has been a fairly consistent pattern over the past few decades, which will persist into the future. There are three main components to this multi-layered security environment. First, there is the imbrication of national and regional conflict dynamics. While statistical analyses show that intrastate or civil wars have been far more common in Africa than interstate wars, the vast majority of intrastate conflicts in Africa could be more adequately described as regionalised intrastate conflicts. Interventions by neighbouring countries in other country's domestic conflicts, whether through cross-border military operations or proxy support to rebel groups, has been common across Africa. Since the 1990s, rebel groups have also become increasingly transnational in character. Beyond the proxy support received by other states, this has also involved the establishment of cross-border safe havens (enabled by complacency or weak territorial control by neighbouring countries), the reliance on cross-border illicit trade and banditry revenues, and reliance on cross-border support networks or ethnic affinities. In some instances of intrastate conflicts, an international dimension has also superimposed itself on the national and regional conflict dynamics through the

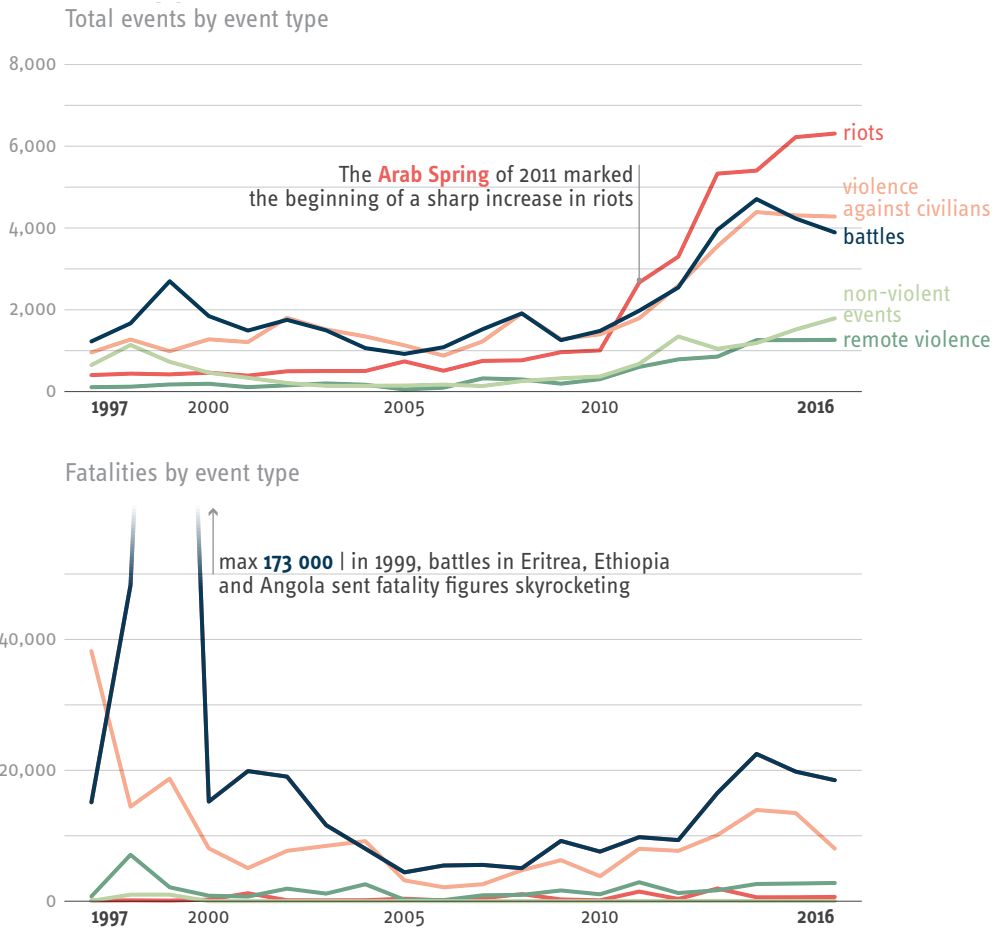
direct or indirect intervention of foreign states (such as the US's repeated interventions in Somalia since the 1990s or France's recent military operations in the Sahel).

Intrastate conflicts with cross-border dimensions are likely to remain a dominant feature of the security environment in Africa, which poses significant challenges for the implementation of both peace enforcement and peacebuilding policies. Interstate conflicts are unlikely to supersede this form of conflict, but there is a potential for an increase in interstate conflicts in the future as border disputes (both terrestrial and maritime) are widespread across the continent and regional mechanisms to address these, such as the African Union Border Programme, are hampered by lack of funding and technical expertise. So far, interventions by neighbouring countries have primarily been driven by concerns about the spillover effects of intrastate conflicts, rather than by border disputes *per se* – although both can mutually aggravate each other. Over the longer term, however, increased competition over resources caused by climate change, fresh water stresses and demographic pressures could place additional strains on border contestations between states. The extent to which this poses an increased risk of armed violence will largely depend on changes in the professionalisation of African armies (an issue addressed later in this chapter) and patterns of regional security cooperation.

A second component of the multi-layered security environment in Africa is the coexistence of state and non-state violence. It is not uncommon that within a same conflict space, conflict dynamics are simultaneously driven by confrontations between state forces and non-state forces and by fighting between various non-state forces. The latter has traditionally taken the form of confrontations between competing rebel groups, but increasingly this also involves intercommunal conflict. This form of violence is expected to increase due to growing livelihood pressures. State and non-state conflicts commonly have distinct yet intermeshed drivers, making them difficult to resolve. Dividing lines between state and non-state conflict actors are often blurred as a single conflict entrepreneur can operate as both a state and non-state actor or (informal) links are built between conflict actors across this divide. More recently, growing sociopolitical violence in the form of electoral and social protests has etched itself onto these dynamics, a trend which is likely to persist into the future. For instance, over half of all elections in Africa since 1990 (estimates vary in function of the dataset) have been accompanied by violence, although most of it has been of low intensity. Often overlooked in discussions of violent trends on the continent, largely because data on this is sparse, is the level of everyday violence experienced by African populations. This violence is often meted out by state security forces in the form of police harassment and extortion, the dismantling of informal settlements and markets, and the violent repression of protests. Everyday violence however also flows from criminal violence, which has been on the rise on the continent. According to the United Nations Office on Drugs and Crime (UNODC), in 2013 Africa accounted for 31% of worldwide intentional homicide rates, with Southern Africa particularly affected although rates are increasing in Eastern Africa

as well. The upshot of all this is that the common frame of separating war and non-war violence is of little help in addressing security dynamics in Africa.

Figure 11: Reported political violence and protest events



Source: Armed Conflict Location & Event Data Project

A third, closely linked, component of the multi-layered security environment in Africa is the diversification and growing fragmentation of conflict actors, especially non-state conflict actors. Conflicts in Africa are commonly characterised by the involvement of a plethora of armed groups, which are subject to frequent reconfigurations and shifting alliances. Many of these fragmented armed groups are often also militarily weak and lack cohesion, while at the same time being extremely mobile and adaptive. The result is that fewer states face existential threats from non-state armed groups (i.e. the risk of the regime being overthrown by rebels is low) but there

is a higher risk of protracted and diffuse patterns of violence which are difficult to eradicate, complicated by the shifting geographical boundaries of areas where insurgents are active. Added to this is the growing decentralisation of conflict actors, as a result of the mobilisation of political and communal militias by political actors or other conflict protagonists. Recent research suggests that militia activities may account for up to a third of recent conflicts on the continent. This development results from the continued absence of the state in many areas, a vacuum that is filled by local self-defence and vigilante groups, which may act independently or at the behest of the state as it outsources local policing activities to these groups. The growing influence of Koglweogo self-defence groups in Burkina Faso and their violent enforcement of 'local justice', which has provoked escalating tensions with local populations and the state, offers a recent illustration of this dynamic. Another important factor driving this trend has been the growth of electoral, and therefore political, competition, which has encouraged some national and local political actors to create or mobilise pre-existing militia groups in their bid to access power. Looking ahead, the prospect that states will also come to rely on such groups in the context of counter-terrorism operations could further underscore the salience of these actors in security dynamics in Africa.

Capacities for managing security challenges

There are a variety of factors that are driving armed conflicts in Africa. Looking towards 2025, the extent to which armed conflict will continue to decline or increase will depend on, among other factors, patterns of relative inequality, poor governance, and democratic deficits in specific countries. Over the longer term, it remains an open question how far the growing youth bulge and increasing resource pressures will become drivers of armed conflict and sociopolitical violence (these trends are discussed in chapters 2 and 3 of this report). There are, however, three trends that will be particularly significant in shaping the security environment on the African continent in the near future, and the capacity of African states to manage multi-layered security challenges: (i) the professionalisation of African armies; (ii) the strengthening of regional security cooperation; and (iii) the diversification of external security actors.

Traditionally, African militaries have been weak and underfunded. In 2016, defence spending by African countries only represented 2.2% of worldwide global spending. However there exists significant variability between African countries: while about 28% of South Sudan's government budget went to defence spending in 2015, Liberia spent less than 2% of its budget on the military. The result has been poorly equipped and ill-trained armies and difficult living conditions for soldiers, leaving many African armies unable to respond effectively to security challenges and, in some countries, even evolving into major security threats themselves. Lack of resources helps explain this weakness that affects so many African armies. But another important factor has been the deliberate weakening of militaries by African

leaders in order to pre-empt risks of military coups. The deliberate underfunding of armies and the development of parallel structures of authority within the security forces – creating huge challenges for enforcing command and control, broader accountability and operational efficacy – has been a common tactic used to curtail the political influence of the military forces.

Over the past ten years there has been an important shift though as defence spending has systematically increased. According to the Stockholm International Peace Research Institute, defence spending in Africa has increased 48% since 2007. This increase in military spending has occurred despite the overall decline in armed conflict on the continent. It is also noteworthy that some of the highest defence spenders in Africa include countries that are not presently in the throes of armed conflict and are not all authoritarian regimes (Angola, Botswana, Guinea Bissau, Mauritania, Namibia and Zimbabwe were in the top 10 of defence spenders in 2015). This suggests that the increase in defence spending has not merely been motivated by security threats but also by African countries' drive to modernise and professionalise their armies. Over the past two years, there has been a reduction in overall African defence spending: it declined by 5.3% in 2015 and 3.6% in 2016. However, this is likely to be a short-term trend as the decrease is primarily driven by the drop in world commodities prices, as reflected by the sharp reduction in defence spending by major oil producers such as Angola, South Sudan, and Chad. Other countries like Botswana, the DRC, Nigeria, Mali and Senegal have continued to increase their defence spending albeit at a slower rate. Looking forward, it is therefore likely that investments by African countries in the modernisation of their armed forces will continue. This will be buttressed by growing external military support provided in the context of counter-terrorism operations, particularly in West and East Africa, and the affirmed commitment of African countries to bolster the conflict management and peace-keeping capabilities of the African Union and sub-regional organisations.

Further modernisation and professionalisation of African armies could positively impact the security landscape on the continent by boosting the national and (sub-) regional capacities to respond to security threats. It could therefore help to reinforce the long-term trend of a decline in armed conflict. However, where rises in defence spending occur in authoritarian regimes facing political instability, more professional armies also means increased capacity for repression and therefore constitute a driver of future violence and armed conflict. Stronger and more effective armies could also increase the risk of interstate conflicts over unresolved border issues (particularly in East Africa), unless this development is offset by closer regional security cooperation. (Sub-)regional organisations will be key venues for promoting such cooperation, although more informal and *ad hoc* arrangements are also likely to emerge, as seen recently between countries in the Lake Chad Basin region.

Despite this trend of growing modernisation and professionalisation, governments in Africa will continue to rely on multinational peace operations and external military assistance. Africa has over the past decade seen an exponential growth in the

deployment of peacekeeping operations. An estimated 120,000 peacekeeping troops were deployed across the continent in 2015, primarily within the framework of United Nations-led missions. While African countries contributed over 60% of the troops for these peacekeeping missions, they have contributed less than 0.5% to UN peacekeeping budgets and less than 1% to the African Union's peace support operations budget. Commitment by African countries to contribute troops to peacekeeping missions is likely to continue into the future. Patterns of country contributions will however shift over time (for instance, over the past decade, Nigeria and South Africa have become less prominent contributors while Ethiopia and Rwanda have become the top contributors), depending on countries' financial resources, internal stability, and regional interests (regional proximity and concerns over conflict spill-over effects constitute a key factor driving the willingness of individual African states to contribute troops to peace operations). Efforts by African countries to take more direct leadership over conflict management and peace operations on the continent, through the African Union and sub-regional organisations, are also set to endure although the trajectory this takes will be highly contingent on their ability to increase the financial independence of these organisations as well as the degree to which the reform agenda for the African Union put forward in January 2017 is successfully implemented. Looking towards 2025, dependence on the UN for the delivery of peace operations will therefore likely persist.

Box 2: African Peace and Security Architecture

Support for peace and security in Africa forms a cornerstone of the EU's strategic partnership with the continent. Support for the African Peace and Security Architecture (APSA) was identified as a priority in the 2014-2017 roadmap of the Africa-EU partnership on peace and security. One of the main challenges for the operationalisation of APSA is the lack of funding and, connectedly, its dependence on external funding which limits African ownership of APSA. The EU has financed over €2 billion since 2004 through the African Peace Facility (APF), which constitutes the main source of funding support to the AU and the Regional Economic Communities (RECs). Under the current 11th European Development Fund (EDF), the APF allocated €961.2 million to Peace Support Operations Division (PSOD), €55 million to the operationalisation of the APSA and €15 million for Early Response actions.

The EU has already taken measures to slowly scale down its support, for instance by limiting funding of African-led peace and security operations (PSO) by 80% of troops allowances costs. Nevertheless, the EU continues to provide substantial financial support to AMISOM (Somalia), the African Standby Force and ongoing operations in the Lake Chad region (MNJTF - Multinational Joint Task Force), South Sudan, the Gambia and Burundi. In addition, it is confronted with new demands in the Sahel to support the regional force, G5 Sahel.

The AU is committed to African ownership of peace and security initiatives on the continent. In June 2015, member states agreed to fund 25% of the PSO budget by 2020 through the establishment of a Peace Fund. This could open the way for increased UN funding under assessed contributions. According to Kabureka's recommendations, a new funding model through a 0.2% levy on eligible imports would ensure a total of \$400 million funding for the PSO budget. While not all member states are on board yet, implementation is progressing.

Beyond funding challenges, results are also mixed regarding the deployment of Peace Support Operations, the ECOWAS brigade in Mali and the ECOWAS brigade in the Central African Republic. The African Standby Force is operational on paper only, and there are significant regional differences in the level of maturity of the regional standby forces. There is no legal framework guiding the interaction between the AU Commission and the RECs/RMs regarding the deployment of a brigade. The emergence of new cooperation models in response to transnational threats, such as the MNJTF and G5 Sahel coordination, calls for a review of APSA and its working methods.

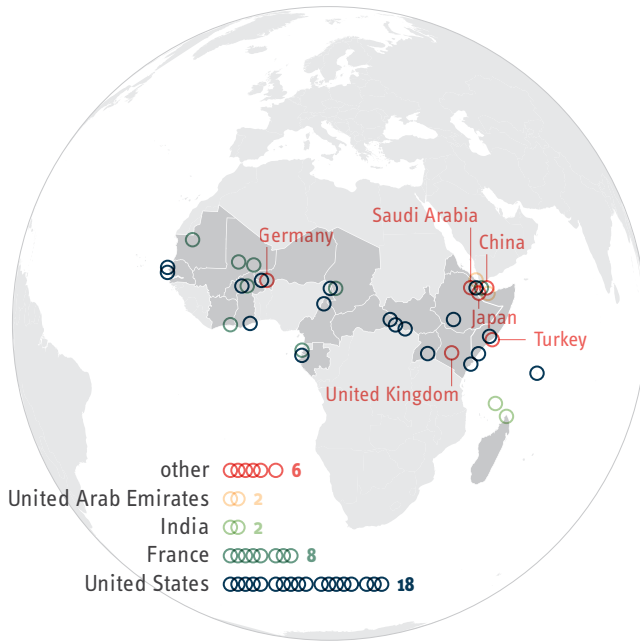
Alice Vervaeke

An important shift that is taking place on the continent is, however, the diversification of external security actors. While the EU, individual European countries and the United States will remain important partners in the security area (in terms of providing training, logistical support, and military assistance), new actors are likely to seek greater influence. Africa has over the past decade seen a diversification of its external partners, primarily at the economic level. Looking ahead though, we are likely to see this diversification expand to the security arena with the increase in military aid from non-traditional partners and the expansion of foreign military bases on the continent. The main emerging security partners on the continent will be China, India, Turkey, Russia, Japan and the Gulf States and the sub-regions that are likely to be most strongly affected by this development are East Africa, followed by West Africa. China's evolving security involvement on the continent – since 2012 its contribution to UN peace operations has significantly expanded and is no longer confined to low-key support roles, while in 2017 it opened its first overseas military base in Djibouti – is particularly significant as it heralds a shift from its traditional non-interference foreign policy stance towards Africa. This is driven both by the need to protect its economic and commercial interests on the continent (including securing maritime routes in the Indian Ocean) and by Beijing's efforts to bolster its position as a global power. China's growing security role will motivate Asian rivals such as Japan and India to increase their own security involvement on the continent, though their capacity to challenge China's influence in Africa will be limited. Equally noteworthy is the potential for a greater security involvement of Middle Eastern and Gulf States in Africa. Saudi Arabia, the United Arab Emirates and Turkey are expanding their military cooperation with countries in East Africa,

and are seeking to develop military bases in the region. While closer cooperation reflects the growing economic interests in the Horn, the conflict in Yemen is the current main driver for their greater security role in the region. If the Yemeni conflict remains unresolved and regional tensions in the Gulf further escalate, East Africa could become a key arena of competition for influence between these countries. This could come to pose a high risk of regional destabilisation and fan the flames of interstate or intra-state conflict in East Africa, affecting Ethiopia, Eritrea and Somalia in particular.

Figure 12: Foreign military bases in Sub-Saharan Africa

Total number by owner of the base



Data: irinnews.

VI. RELIGIOUS EXTREMISM AS A VECTOR OF VIOLENT MOBILISATION

Radicalisation and violent extremism are commonly considered a growing threat to security in Africa, given their devastating impact in terms of human lives and geopolitical instability. While different forms of religious extremism have long featured in violent conflicts across the continent, a distinct jihadist matrix emerged in a number of attacks carried out in East Africa during the 1990s. 2001 marked a watershed in the international security environment: since then African states have been at the forefront of the war on terror proclaimed by the US. A second important turning point was the victory of the Islamic Courts Union (ICU) against Somali warlords in 2006, resulting in a situation where a jihadist-inspired armed movement controlled large swathes of territory. Although the Courts were militarily defeated, the splinter movement al-Shabaab emerged from the ashes of the ICU, and later pledged its allegiance to al-Qaeda. Meanwhile, in north-west Nigeria the Boko Haram sect evolved into an armed movement gaining territorial control, extending across borders, and pledging its alliance to Daesh. Terror attacks, deaths and displacement related to violent actions undertaken by jihadist groups have been increasingly frequent, especially in the vast arc of crisis stretching between the Red Sea and the Gulf of Guinea. Following the implosion of Mali (2012), and the proliferation of jihadist groups controlling part of its territory, international intervention paved the way for a peace process (2015) that remains challenged by armed insurgent groups entrenched in regional strongholds. Looking ahead, it is highly likely that religion – notably Salafist-jihadist variants of political Islam – will continue to act as an important catalyst for violent political mobilisation in the years to come.

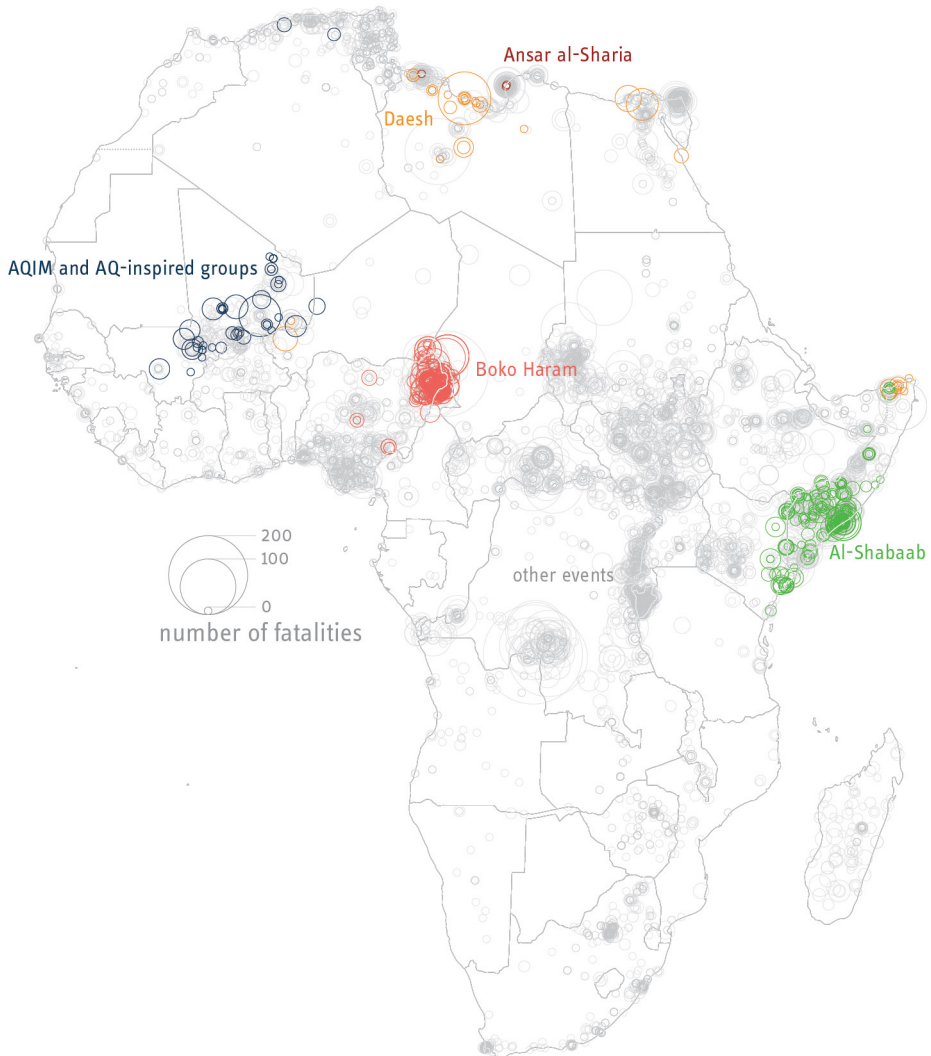
The radicalisation landscape

But while religion has come to play an increasing role in Africa's violent conflicts, it would be wrong to assume that religious demarcations or even radical religious beliefs necessarily translate into the pursuit of violent jihad. The term *radicalisation* is widely used in today's policy debates on terrorism and counterterrorism to designate active support for or engagement in ideologically motivated violence to further social, economic and political objectives. As with all definitions of ideologically-motivated violence however, caution is in order: religious and confessional differences may well be key factors in political conflicts that have turned violent, but where the question of radicalisation as such is hardly an issue. For example, conflict in the Central African Republic or domestic tensions in Ethiopia can hardly be understood without factoring in the role played by religious beliefs (including Islam), yet political violence in such contexts is not necessarily driven by or a product of radicalisation. Likewise, the way in which in 2012 a secessionist Tuareg rebellion in Mali was first outflanked and eventually overcome by jihadist groups was an example of

political opportunism on the part of the jihadists who basically ‘hijacked’ the rebellion: radicalisation features as an effect, not a cause.

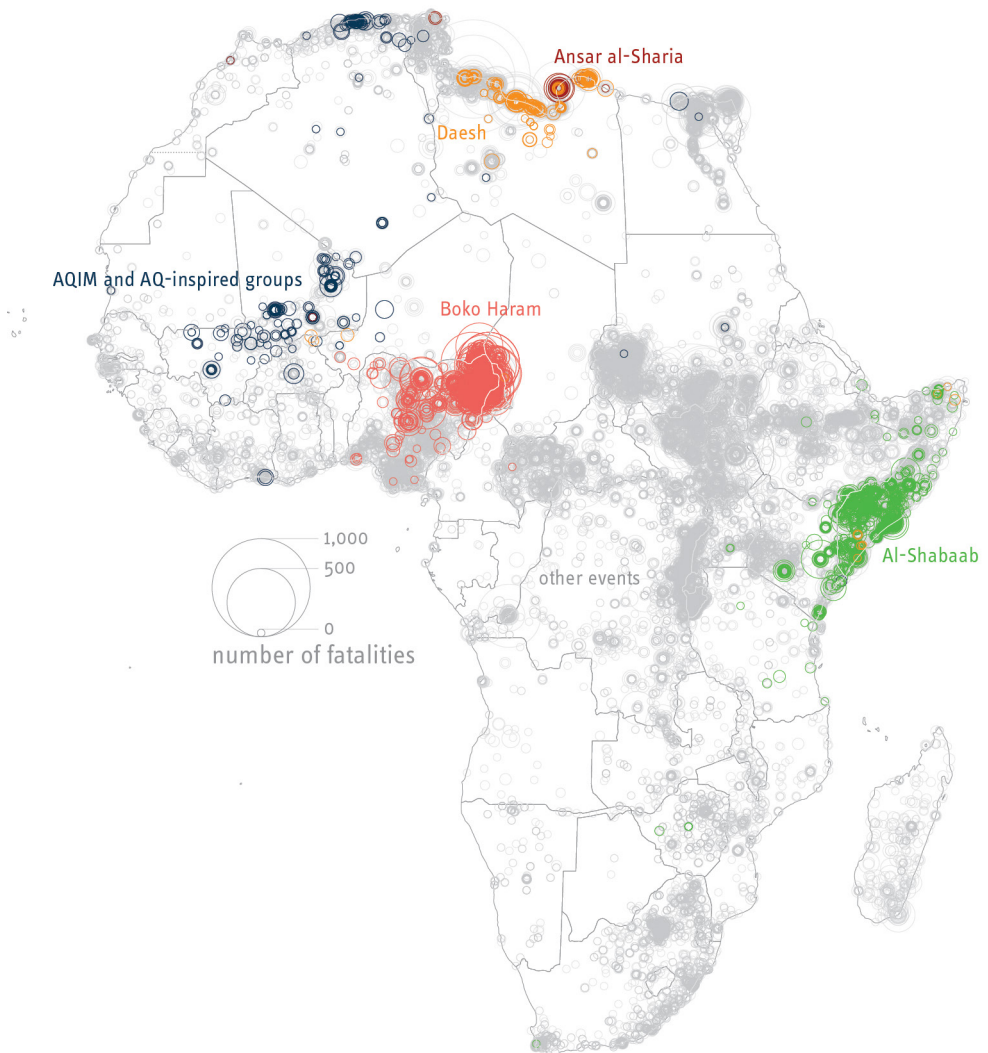
Figure 13: Main active jihadist groups in Africa

Violent acts perpetrated between 1 January and 9 September 2017



Data: Armed Conflict Location & Event Data Project.

Figure 14: Violent acts perpetrated between 2011 and 2016



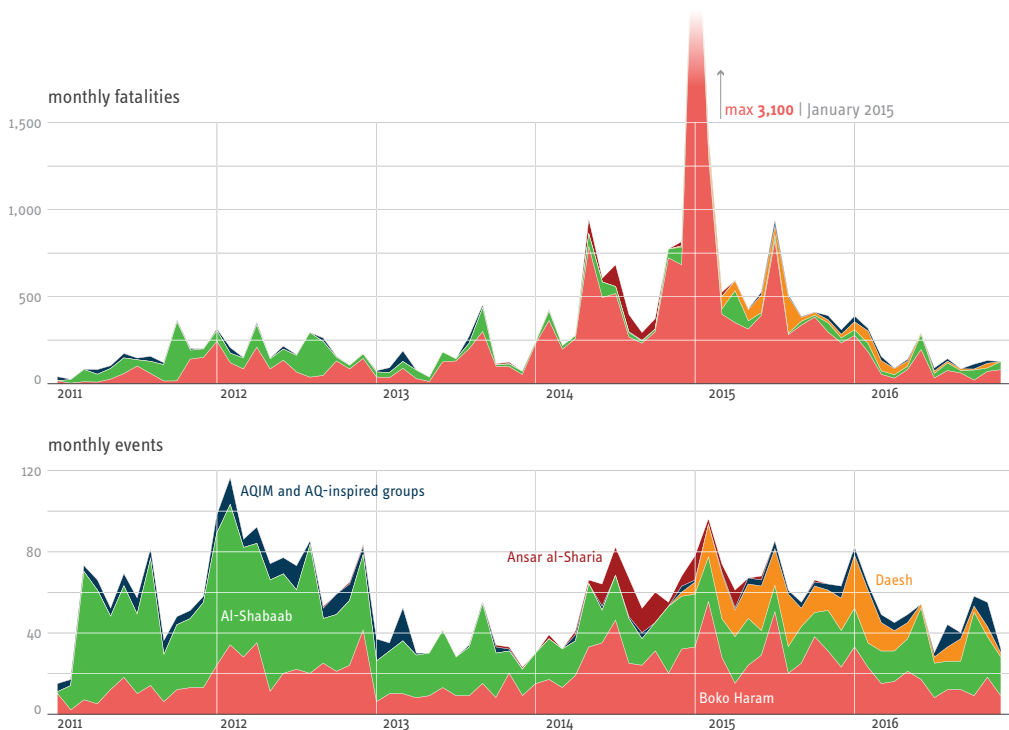
Data: Armed Conflict Location & Event Data Project.

As with the Middle East and North Africa, patterns and trends of radicalisation in Sub-Saharan Africa reflect ongoing controversies surrounding political Islam: this

is particularly true where social movements, political parties and armed groups have been contesting (and, to a lesser extent, justifying) incumbent regimes by invoking a religious duty to fight. In most cases this is a landscape monopolised by jihadist ideologies, whose sources are to be found in the propagation over the last few decades of a puritanical version of Islam, known as Salafism. Since the first Gulf War and the end of the Cold War a transnational populist Islamist movement imbued with a narrative of victimisation exhorting pious believers to take up armed struggle has emerged well beyond war zones such as Afghanistan or Algeria. It would be wrong to simply dismiss this phenomenon as ‘extremism’, given the controversies and rivalries that characterise diverging patterns of sponsorship by states that embrace Islamic law, and that are often credited with a key role in fighting terrorism. The global ‘war on terror’ that is being fought across Africa was declared in alliance with ‘moderate Islam’. More than 15 years on, in armed conflicts across Africa regimes are engaged in a combat against opponents who are systematically branded as terrorists, while local conflicts spill into war across borders. Here, displacement effects can be observed virtually everywhere, while virtually nowhere is there an end to conflict in sight. Acknowledging this uncomfortable state of affairs has obvious implications for drawing scenarios for the next 15 years.

Figure 15: Violent acts perpetrated by selected jihadist groups

Comparison between monthly perpetrated acts and caused fatalities per group



Data: Armed Conflict Location & Event Data Project.

Radicalisation and violent extremism are broad categorisations, under which diverse phenomena that affect African conflicts such as guerrilla movements, sectarian militias, and cell-based terrorist organisations are often lumped together. A closer examination of these diverse violent phenomena shows that Islam is not the origin of the process, but rather a field of contention where the main stake is political legitimacy: rather than postulating a sudden radicalisation that brings about problems with/among Muslims, it should be borne in mind that none of the projects of conquest mentioned so far, beginning with the advances of the Islamic Courts in Somalia, is actually rooted in or triggered by religious matters. Rather, which political project prevails will define Islam at the end of the process. Competition among promoters of 'radical Islam' is increasingly fierce, and is characterised by significant degrees of ambivalence, if not double standards. Traditionally inward-looking, the Kingdom of Saudi Arabia is increasingly assertive in its engagement in Africa, seeking to contain and override its rival Qatar, which is allied with Turkey in its strategic sponsorship of the Muslim Brotherhood. In addition to this, within the world of Islam, the growth of Iranian-backed Shia communities may be observed: today an average of 10% of African Muslims are of the Shia confession and this number is growing, in spite of the fact that they are often the target of hostility.

The rise of violent groups can be ascribed to a number of push and pull factors that operate at a variety of levels. The radicalisation landscape is not only characterised by a clash between lawfully administered secular law and brutally imposed Sharia law but also by sectarian tensions that have turned violent in the Middle East (e.g., Sunni vs. Shia; Sunni Muslim vs Christians), by regional geostrategic rivalries (Saudi Arabia vs Qatar; Turkey vs. Egypt; Morocco vs. Algeria), as well as by direct and indirect forms of Western intervention and sponsorship. In this context, a descent into upheaval and violence – including particularly barbaric forms of violence – is often fuelled by a jihadist call to arms with the aim of destroying impious rule and building from scratch a new order sanctioned by Sharia. When interviewed about their motivations, the majority of voluntary recruits cite religious reasons but admit that they either have not read or have little to no understanding of religious Islamic texts. Thus, even if the focus is limited to the Sunni Islamic world, an analytical spectrum reduced to unidimensional representations along a moderate-extremist axis is ultimately misleading: to give just one example, parties and groups close to the Muslim Brotherhood and Salafist movements clash almost everywhere. In the western and eastern Sahel, the most visible line of fracture runs today between rising forms of Salafist-inspired Islamism and Sufi orders. The Wahhabi-Salafist house is itself divided, with secular regimes fighting 'jihadist terror' sometimes forging alliances with Madkhalism (e.g. in Libya).

A multitude of well-funded humanitarian, religious, cultural and educational initiatives propagate political forms of Islamism that typically erode secular views of the public space and campaign for the introduction of Sharia law to regulate all aspects of public and private life. Sometimes Islamist organisations advocate mediation with jihadist and terrorist groups, as has happened in Mali. The destruction

of historical and religious monuments in Timbuktu in 2012 in Mali bears witness to the jihadists' fury against the Sufi world, whose leaders, perhaps in a defensive stance, tend to identify themselves with traditional local hierarchies and government-backed strongmen.

So, African groups and movements that define themselves according to Islamic precepts – be they inspired by Sufism, Salafism, Shi'ism or Reformism – are highly diverse, and differ in motivation, nature and practice from one another much more than any indicator of their observable propensity to embrace or justify violence may suggest. True, the decision to resort to violence (as opposed to seeking ways to participate in institutional political struggle) and the type of violence to be employed marks 'a point of no return'. However, in an era in which incumbent political formations have a strong vested interest in labelling any political challenger 'radicalised', 'extremist' or 'terrorist', it may be questionable to what extent the resort to violence can be considered as an actual choice, depending on the local context and the level of political repression the groups face. States retain the power to criminalise, and elements or groups deemed to be enemies of the state may be radicalised by design. Needless to say, such tactics are likely to provoke more radicalisation. This is particularly true in border areas affected by war and refugee flows, such as among Somalis in Kenya, or displaced Nigerians facing discrimination and persecution in Niger, Chad or Cameroon: who is a refugee fleeing jihadist rule and who is a jihadist?

The drivers of radicalisation

To gain a better understanding of the origins and dynamics of violent conflict carried out in the name of jihad in Africa, one must consider the social roots of radicalisation. The enmity between Sufis and Islamists certainly involves a theological dimension, but it mainly concerns social and political issues, and in particular grievances regarding political representation and resource entitlement. A wide range of issues is at stake, including the significance of ethnic and tribal affiliations, the transmission of rights and privileges, resource distribution, the role of women and external sponsorship. However, these controversies reveal how different religious discourses are appropriated by competing local, national and international actors engaged in emerging conflicts to justify their political agenda, rather than indicating that the actors involved necessarily espouse a radical interpretation of Islam.

When it comes to jihadism more specifically, and recruitment dynamics pursued by insurgents and militant groups, overarching strategic rivalries do exist (beginning with al-Qaeda vs. Daesh), although it should be observed that tactical alliances are far from uncommon among combatant groups that often define themselves as 'brothers in method'.

Although an overall peak in lethality was reached in 2015, jihadist formations kept expanding their operational radius, as they fragmented into splinter groups

or coalesced with other groups. In a longer-term perspective, the military coups in Algeria (1991) and Egypt (2013), as well as the political convulsions in Turkey and its crisis of democracy, suggest that the inclusion of political Islam in parliamentary politics may be problematic. Transnational Islamist movements such as the Muslim Brotherhood seem to have lost some traction, at least as far as the search for a compromise between democratic representation and Sharia is concerned. At the same time, however, now that the apocalyptic appeal of its proclaimed 'Caliphate' in the Middle East has become less potent following a series of military defeats, Daesh faces challenges in establishing itself in Africa. A political space could become available for hardline jihadist groups that are able to link local conflict, regional organisation, national appeal and global rhetoric through a gradualist, long-term strategy. Al-Qaeda has been successful in developing a multi-faceted strategy, protecting its own forces from counter-terrorism initiatives, and diversifying its territorial and governance tactics on the basis of context and circumstances.

Much of the debate on violent extremism in Africa focuses on demographic and environmental considerations, whereby two macro-drivers of change – i.e., the youth bulge and climate change – will generate pressures around scarce resources that fragile states will be unable to withstand, the result being more radicalisation and violence. But in order to gain a fuller understanding of the advances of jihadism in West Africa it may be more useful to examine the underlying micro-political economy – that is, the crisis of a system of clientelist or neo-patrimonial governance. At the local level, inter- and intra-ethnic cleavages over access to natural resources (pasturelands most notably) often exacerbate latent conflictual relationships between different ethno-tribal groups – and, within them, between landowning elites and the vast majority of the poor and dispossessed. Important changes in land tenure were introduced by neoliberal reforms during the 1990s: drastic changes in land use and entitlement altered the equilibrium between cattle herding, agriculture and fishing activities.

Taxation often takes the form of racketeering with overt or covert connivance between public authorities and traditional tribal leaders, the same chiefs who exert control over land allocation and are typically accused of all sorts of fraud and corruption. Their conspicuous impunity and self-enrichment nurtures a sense of injustice that is often found to be one of the principal motivations of radicalised young people who embark on violent jihad.

In highly segmented and hierarchical societies that have been exposed to marketisation and democratisation, regimes' rent-based co-optation of local elites can often be observed. Traditional leaders negotiate deals with political parties in the capital behind closed doors, and state authorities turn a blind eye to their capturing of those resources that enable them to shore up their wealth and power.

Jihadist organisations are quick to exploit grievances, and co-opt local demands for protection, redistribution and moral integrity by framing the revolt against corrupt

neopatrimonial regimes backed by the West as part of the struggle for the global jihad. The individual level appears to be of little relevance: in plenty of cases radicalisation, or closer engagement with jihadist organisations, happens with entire factions or villages being recruited. Field research shows that not only young people are recruited, and that the factors that drive people to join the ranks of the jihadists are multiple, dynamic and overlapping. Often recruits appear to be motivated by purely local grievances or pressures. In every case, the state – i.e. the attitude of public authorities *vis-à-vis* local issues – plays a key role, which cannot be overlooked.

The jihadist discourse and anti-system dynamics

Jihadist violence in Africa is in part a displacement and import from the Middle East and the Arab world. Yet if one looks at the multiplication and persistence of violent attacks in the Sahel, it transpires that both jihadist leaderships and rank-and-file recruits are increasingly local. Jihadist organisations today show considerable capacity to adapt: as counterterrorism initiatives are strengthened, they prove to be increasingly resilient. This trend, too, is unlikely to reverse any time soon.

While those jihadist formations that have acquired a distinctive transnational character and extend their operations across different borders catch the attention of the media and researchers, the social roots and the local dimension of long-term radicalisation and current processes of recruitment remain largely under-explored. Shedding light on these mechanisms means understanding how inter- and intra-ethnic/communal hierarchies are challenged in remote rural areas, often through dynamics that are different from those in urban areas.

In times of rapid change, jihadism offers a compensatory path to social emancipation. Jihadists present themselves as equal opportunity employers: poetry is often used as an instrument of recruitment, emphasising rebellion against tribal norms, abandoning clan ties, and fighting a dishonourable enemy. At other times, Salafism is simply presented as a doctrine that is true to indigenous aspirations, as a return to moral rectitude and a rejection of alien values and practices imposed by colonial domination. The jihadists thus tap into latent social tensions, and offer simplified and ‘effective’ dispute resolution mechanisms through their mobile Islamic courts, which echo local demands for swift action and an end to impunity.

These anti-system dynamics are more likely to gain ground in those more remote or peripheral regions where the action of the state as a provider of public goods is less established and more problematic – i.e., where the state’s monopoly of force is more vulnerable. The ‘backwardness’ is reflected, for example, in the fact that modern schooling is a twentieth-century innovation in large parts of the territories that are contended by jihadists. In imposing new legal models, colonial powers and post-independence state authorities tended to be rather indulgent *vis-à-vis* the survival of customary law in peripheral regions, turning a blind eye to the persistence of

traditional systems and hierarchies. Finally, African states often have little capacity and/or willingness to deploy resources in remote borderlands. Thus, it comes as little surprise that civil/public servants (e.g., teachers and judges) as well as uniformed personnel (policemen and soldiers) are frequently targets of animosity and violence.

Perception surveys indicate that people's main preoccupation is not radicalisation: rather, their principal grievance is that the judicial system is highly corrupt, often the most corrupt part of the state apparatus. Young people appear to be increasingly critical of the injustices and constraints of traditional hierarchies. The sphere of education is also contentious. Schools and higher-education institutions are frequently the targets of violent extremists. Increasingly, families from the poorest sections of society send their children to Koranic schools. The battle for education is going to be more vital than ever for defining state-society relations.

The degree to which religion is likely to remain an important catalyst for violent mobilisation (with marginalised sections of the population increasingly attracted to Salafist ideology promoted by radical preachers) can also be inferred from the proliferation of religious sects that occurred after the decade of structural adjustment that took place in the 1980s which further impoverished large segments of population. Against this background, the production of common goods for large numbers of citizens (education, employment, social protection, healthcare, sanitation and food security) or, to put it another way, the formulation of inclusive policies will remain highly problematic.

Here jihadism typically presents itself through an egalitarian and moralising discourse that castigates corruption and social injustice and aspires to building a more harmonious social order. A 'de-culturalised' Salafist religious identity able to speak a universal language, invoke a universal *Umma* and produce a shared narrative about political and social order can exert strong appeal among the poor and dispossessed who suffer from systematic exclusion, especially if at the same time it proves able to target corrupt local leaders who are protected by state patrons and served by traditional religious hierarchies.

Box 3: Mystical-religious armed groups in Africa

Spirit mediums and mystical religious beliefs have played an important role in many African conflicts from the Maji-Maji revolt in Tanzania (1905-1907) to the recent rise and fall of the Ugandan Lord's Resistance Army (LRA). The LRA grew out of the remnants of the Holy Spirit Movement founded by spirit medium Alice Auma Lakwena and later led by Joseph Kony, the self-declared spokesman of God, seeking to establish a theocratic state based on the Ten Commandments and nativist Acholi tradition. While the LRA is now believed to number no more than around 100 armed men, it has stayed active in neighbouring countries and could rise again.

Yet armed groups formed exclusively for mystical religious purposes in Africa remain rare. Even though they often resort to magic for tactical reasons, socioeconomic and political factors, rather than religious motivations, offer a better explanation for their engagement in civil wars. Even the LRA has been accused of exploiting religious rhetoric to gain more power for the marginalised northern ethnic groups of Uganda. In fact, the LRA could be seen as a variant of millenarian religious movements that often emerge in the context of marginalisation: in the crisis of weakness and despair, religion becomes the medium through which grievances are framed.

Among many population groups affected by extreme poverty and exclusion in Africa, the conditions are ripe for new millenarian promises of religious hope and social revenge. Land conflicts in particular tend to manifest in religious terms, for many ancestor spirits are attached to a certain region and the traditional control of land is gradually eroding in many parts of Africa. Witchcraft eradication movements could constitute another valid cause for new mystical religious groups, as it is typical for many prophetic movements to stress the ideology of social purification and today's newspapers across Africa regularly cover witchcraft accusations and alleged ritual murders.

In certain circumstances millenarian movements may demonstrate a propensity to turn violent: in these cases, apocalyptic spiritualism is often associated with opportunistic politics and warlordism. Furthermore, their evolution depends greatly on local conflict-resolution mechanisms. By no means all grievances turn into an armed conflict.

Another possible way of forming religious armed groups is by imbuing already existing militias, community self-defence groups or traditional hunter associations with mystical overtones. In the Central African Republic, anti-balaka militias fighting against the Muslim Séléka have been recently accused of witch-hunting, but originally they were set up by communities to fight against bandits, cattle raiders or poachers. The religious dimension of the anti-balaka was triggered only when the Séléka militias committed atrocities in attacks on non-Muslim communities.

It is however tempting for armed groups across Africa to gain legitimacy by reviving mystical religious beliefs. As they cannot claim a monopoly of violence, they can assert themselves against rival groups by celebrating their occult powers or noble religious goals. In South Sudan, for example, the White Army, an ethnic-based militia supporting former Vice President Riek Machar, has been reported to use Nuer religious symbols and prophecies to mobilise warriors for battle.

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State responses

Where these trends will lead will depend very much on African states' responses, as well as on international assistance and intervention. In this field, it is illustrative that when asked to specify what motivated them to join a jihadist organisation, 'government action' is the answer given by some 70% of voluntary recruits. To what extent has the terrorist threat in the Sahara preceded the deployment of a major counter-terrorism strategy by the US after 9/11 – or, to put it another way, has the therapy only inflated and magnified the problem? Al-Qaeda in the Islamic Maghreb (AQIM) announced the establishment of an 'Emirate of the Sahara' here in 2012, several years after the US chose Mali as a key security partner in the Sahel-Sahara region, praising its good governance. In hindsight one can only wonder whether the implosion of Mali and the advances of jihadist battalions was a one-off occurrence or an early warning sign of deeper tectonic shifts, and problems to come.

Affected African states are increasingly cooperating with one another, coordinating their criminal justice systems, building new military capacity, developing new security models that include altered border security arrangements, and initiating preventive and remedial counter-radicalisation measures. This approach reflects their growing conviction that ultimately military answers are inadequate to win the war.

A clear trend that is highly likely to develop is the (re-)institutionalisation of Islam, whereby the state takes control of religious practice, often under explicit foreign influence (e.g. Morocco, Saudi Arabia). African Sub-Saharan States will rely increasingly on foreign aid and external assistance, with external players sponsoring a distinctive view of religious affairs and preaching, through the training of ulemas and imams, as well as through the promotion of hybrid education systems that welcome religious teaching in public schools.

A number of factors will determine whether these efforts will gain credibility and legitimacy, and will play a role in shaping future scenarios.

First, the degree to which jihadism will be contained and prevented from intersecting with other cleavages – be they ethnic, tribal, linguistic, sectarian (and even national, in the modern sense of national liberation from foreign intervention/occupation).

Second, while counter- and de-radicalisation initiatives are more likely to be adopted at national level in various fields (economic, educational etc.), we will see more externally assisted bilateral and regional efforts in the field of counter-terrorism (including attempts at regionally harmonising criminal justice systems). This might pave the way towards an 'Africanisation of conflict management' (as illustrated for example by the G5 Sahel force).

Third, how states will perform in a strategic sector such as education, which is increasingly under attack, will be critically important. Although primary education

enrolment rates across Sub-Saharan Africa have doubled in the last generation and tend to converge with those of other continents, completion rates are still under 70%, compared to 90% in East Asia.

Fourth, in presence of armed conflict the effectiveness of DDR and reinsertion programmes targeting ex-militants will be extremely important. Failing to differentiate adequately between, for example, individuals who joined jihadist groups under duress and those who joined voluntarily, between victims and perpetrators, between refugees and criminals, will inevitably exacerbate the drivers of radicalisation. Such an indiscriminate policy will only serve to fuel new grievances that jihadist groups are only too ready to exploit.

Fifth, local grievances need to be addressed through inclusive economic improvement, and anti-corruption policies that curb at least the most blatant forms of rent-seeking by elites. Systematic corruption and elite co-optation are often part of governance systems, so there is a danger that ill-advised anti-corruption measures may generate political instability: such measures need to be complemented with progress towards social inclusion.

In many cases we are likely to see an increase in African countries' budgetary dependence on foreign aid donors due to increased security expenditure, along with new forms of military assistance and intervention. But, quite apart from the fact that historically this does not forebode well for accountability and good governance, externally assisted counter-terrorism cannot be relied upon indefinitely, not only because external sponsors will not provide endless support, but also because it in no way matches local perceptions about priorities.

Depending also on a number of factors that typically impact heavily on state budgets (e.g. international prices), it is possible that in some cases we will see some rebalancing towards development priorities – while in other cases central authorities will not have credibility, and their legitimacy in peripheral regions will be further eroded: at that point, remote governance via corrupt clientelist channels may not prove to be a viable option for all too weak and fragile states. In those areas that are not considered strategic, therefore, we may witness the spreading of hybrid governance or even the emergence of new forms of territorial control by jihadist (including 'former jihadist', 'moderate' jihadist?) organisations, while states will undergo authoritarian consolidation around the capital and portions of territory deemed strategically or economically 'useful'.

Box 4: New forms of Christianity and politics in Africa

The religious landscape of Africa has gone through a major transformation in recent decades, as Pentecostal and charismatic churches have spread rapidly and become increasingly active players in national politics. While in the 1970s less than 5% of Africans belonged to these denominations, today they account for over a third of the continent's population. Even though this trend has barely left any part of Africa unaffected, the growth in Pentecostal and charismatic churches has been particularly important in Southern and East Africa. Contrary to common belief, this expansion is for the most part a homegrown phenomenon and much less a product of Western missionary activities. In fact, some of the African Pentecostals are today establishing churches in the UK and the US to cater for diaspora communities.

The rise of new Pentecostal and charismatic churches is largely a modern and urban movement. In cities, new denominations appeal particularly to the middle class, upwardly mobile professionals, young people and women. Churches spring up in shopping centres, cinemas, nightclubs and warehouses, and with their use of dance, popular music and contemporary fashion code, they attract crowds through lively entertainment. In addition to the Sunday services, churches organise open-air rallies, 'crusades', revival meetings, street preaching and tele-evangelism events. The concept is so successful that even some mainstream churches and Muslim prayer groups have begun to emulate these exuberant modes of worship

While earlier forms of Pentecostalism promoted a rather ascetic way of life, condemning the pursuit of riches, the new brands of Pentecostalism preach the so-called prosperity gospel that promises health, wealth and success for its followers. Churches encourage their members to pray to Jesus for wealth and abundance but also urge them to work hard, take risks and create businesses. Some congregations even provide business skills training to their members.

Despite their modern outlook, the new brands of Christianity have proven successful in Africa because of their willingness to acknowledge traditional beliefs in ancestors and spirits. Contrary to the early missionary attitude that urged rejection of such superstitious practices, Pentecostals take witchcraft seriously, offering healing and deliverance ministries. The Holy Spirit both protects against witchcraft and provides fertility, health and prosperity for believers.

Despite their initially very cautious attitude towards politics, Pentecostals have become increasingly important political actors in the last decades. Convinced that politics should be influenced by Christian values, some churches have adopted an openly hostile attitude towards Islam while others have advocated conservative policies against homosexuality, euthanasia or abortion.

However, new churches appear to be very much beholden to the state authority, unwilling to challenge the ruling elite. Some pastors even call directly on their followers to vote for the head of state or ask people not to protest election results, because the winner 'is chosen by God'. In fact, the most prominent influence that the Pentecostal and charismatic churches have had on African politics is the mainstreaming of the Christian language and narrative which have become increasingly important in framing the campaign rhetoric of elections and the interpretation of political events.

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CONCLUSION

Looking towards the coming decade, African countries will face various socio-political, economic and security transformations, which carry both opportunities and risks for their societies. The complexity in addressing these challenges is reinforced by the fact that many of the trends discussed here are to a large extent deeply interlinked. Acting in one domain is thus likely to have knock-on effects on other trends, which is a consideration that needs to be integrated in future policy planning. There exists, however, no strict path dependency in the challenges identified in this Report. Understanding causality in mechanistic terms would lead to ill-adapted responses that are highly likely to lay the ground for tomorrow's problems. The growing youth bulge, for instance, does not inherently or inevitably lead to increased unrest and violence, nor does religious mobilisation necessarily lead to violent extremism.

A common thread that emerges from the analysis is the salience of three distinctive factors in determining how African countries will manage these challenges. A first determining factor is the importance of **regional cooperation** to address issues that challenge and transcend state orders and borders. African countries have already invested considerable effort in developing and strengthening regional cooperation schemes, beginning with economic opportunities and culminating in counter-terrorism, but much remains to be done to promote regional integration. Many of the challenges highlighted in this Report have significant cross-national dimensions: developing effective responses to them will require closer cooperation between African countries, whether through existing formal institutions or more *ad hoc* arrangements. Regional cooperation may also support ongoing efforts by African countries to set the terms of the continent's engagement with external actors, which is a key aspect especially for those trends whose evolution is highly sensitive to external intervention dynamics, such as resource depletion and land pressures or patterns of armed conflict.

A second key factor will be the ability and willingness of governments to adopt policies promoting **social inclusion** – that is, rising up to the challenge of redistribution to address economic polarisation and the marginalisation of wide strata of population. This dimension is particularly important since it often intersects with ethno-national, religious and gender markers, fuelling social and political instability, poor resilience and significant institutional fragility.

A third factor that is closely related to the previous two is **governance capacity**. Various chapters in the Report have shown how poor or inadequate governance lies, in part, at the root of resource depletion stresses, the rise of violent extremism, and multi-layered security challenges. At the same time, governance capacity – beginning with fiscal capacity – will strongly influence whether countries will be able to manage the challenges raised by the six trends identified in the Report. Governance

capacity does not simply mean state sovereignty: much has been and is being written and debated about governance in areas of limited statehood, hybrid governance, and transnational governance. Reinforcing governance capacity across the continent, including building ownership and sustainability, will thus continue to be essential and require critical questioning and innovative thinking about the different modes and levels of governance that can constructively tackle the unfolding transformations facing the continent.

ANNEXES

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LIST OF AFRICAN FUTURES TASK FORCE EVENTS

#	Workshops	Date	Location	Partners
1	Africa's international relations: between foreign actors and external projection	01/03/2017	Brussels	Egmont Institute
2	African security: between fragility and resilience	22/03/2017	Paris	
3	EU-Africa Strategic Dialogue	04/04/2017	Rabat	OCP Policy Centre
4	Future of democracy in Africa: trends in state-society relations	10-11/05/2017	Brussels	Open Society European Policy Institute (OSEPI)
5	EU-Africa Strategic Dialogue	29-30/06/2017	Pretoria	Institute for Security Studies (ISS)

- 1. Africa's international relations: between foreign actors and external projection**
 Date: 1 March 2017
 Location: Brussels
 Partners: Egmont Institute
- 2. African Security: between fragility and resilience**
 Date: 22 March 2017
 Location: Paris
- 3. EU-Africa Strategic Dialogue**
 Date: 4 April 2017
 Location: Rabat
 Partners: OCP Policy Centre
- 4. Future of democracy in Africa: trends in state-society relations**
 Date: 10-11 May 2017
 Location: Brussels
 Partners: Open Society European Policy Institute (OSEPI)
- 5. EU-Africa Strategic Dialogue**
 Date: 29-30 June 2017
 Location: Pretoria
 Partners: Institute for Security Studies (ISS)

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ABBREVIATIONS

APF	African Peace Facility
APSA	African Peace and Security Architecture
AQIM	Al-Qaeda in the Islamic Maghreb
AU	African Union
DDR	Disarmament
DRC	Democratic Republic of the Congo
ECOWAS	Economic Community of West African States
EDF	European Development Fund
FDI	Foreign Direct Investment
GDP	Gross Domestic Product
ICU	Islamic Courts Union
LRA	Lord's Resistance Army
MNJTF	Multinational Joint Task Force
OECD	Organisation for Economic Co-operation and Development
RECs	Regional Economic Communities
RMs	Regional Mechanisms
SMEs	Small and medium-sized enterprises
UN	United Nations

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