IDA AFRICA WATCH

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IS CAMEROON HEADED FOR AN ELECTION CRISIS?

By Dr. Alexander Noyes

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Cameroon presidential election opposition candidate Maurice Kamto of the Cameroon Renaissance Movement. (Source: https://www.facebook.com/Maurice.kamto2018/.)

Dr. Alexander Noyes is an Adjunct Research Staff Member at the Institute for Defense Analyses.

THE JUNGLE CITY: EQUATORIAL GUINEA'S NEW CAPITAL

By Austin Swift

In the remote interior of Equatorial Guinea, Djibloho, a new capital city, is rising from the rainforest. Also called Ciudad de la Paz (City of Peace), the emerging metropolis of Djibloho is already being used for state functions, and it will eventually replace the current island capital, Malabo, as the centralized seat of power. Concerns have arisen about the political motives and environmental costs of building a capital from scratch. *more...*

Equatorial Guinea. The current capital, Malabo, is located on Bioko, an island northwest of the mainland. The future capital, Djibloho, is located on the mainland. (Source: Map by Author. Produced in ArcGIS 10.6 using the National Geographic Base Layer.)

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Background

Cameroon is a lower-middle-income country of 23 million located in Central Africa. In 2016, it had a GDP of $32 billion, with a growth rate of 4.4 percent. Cameroon shares borders with Chad, the Central African Republic, Equatorial Guinea, Gabon, and Nigeria. The Northwest and Southwest regions, bordering Nigeria, speak English while the rest of the country speaks French. Both French and English are official languages. For years, the country was known as a semi-authoritarian but stable country in an unstable region. But recently two separate conflicts broke out in Cameroon's Far North and in the Anglophone Northwest and Southwest regions.

Anglophone and Far North Conflicts

Civil unrest in the Anglophone regions of Cameroon began in October 2016, when teachers and lawyers in the two regions took to the streets to demonstrate against the underrepresentation and marginalization of English speakers. The Anglophone regions make up 3 percent of the country's land, but contain over 20 percent of the population. The government responded harshly, blocking internet access and employing an anti-terrorism law intended to be used in Cameroon's fight against Boko Haram in the North.

When Anglophone separatists declared an independent "Federal Republic of Ambazonia" in October 2017, the government cracked down further, leading to outright conflict and fears of civil war. The government arrested thousands, and security forces fired on protestors. Biya deployed the Rapid Intervention Battalion, a feared special forces unit that reports directly to the president. According to the International Crisis Group, the conflict has led to the deaths of 420 civilians, 175 security forces, and hundreds of separatists and has displaced more than 300,000. Another 25,000 have fled to Nigeria. In the fighting, security forces have been accused of widespread human rights abuses, including executions of civilians and the burning of more than 20 villages.

Cameroon has also been fighting a battle with Boko Haram in the country's Far North region, along the border with Nigeria, since 2012. According to the United Nations, this conflict has led to the displacement of 238,000. Just before the 2018 elections, after a decline in attacks, Biya announced that the fight against Boko Haram had been won.

2018 Elections and Aftermath

In the lead-up to the election, Anglophone separatist groups threatened to disrupt and boycott the presidential contest. Election day was marred by violence, with security forces killing two armed men in Bamenda, an English-speaking town in the Northwest. Deben Tchoffo, the governor of the Northwest region, defended the actions of the security forces: "We shall not allow terrorists to disrupt the election. We are informed that armed men are shooting indiscriminately to frighten voters, we shall not allow such a thing to happen." Skirmishes between security forces and separatists were also reported in six other towns, with several killed in the Southwest region. On election day, Biya said that he was "satisfied that the election is taking place in calm and serenity and without fighting." More than 7,000 election observers, mostly from the region, were in Cameroon for the polls. The African Union and the African Network for the Promotion of Democracy and Good Governance both said that elections were generally fair. But turnout was low, particularly in the English-speaking regions.

The day after the election, Kamto surprised many by announcing that he had won the vote (but did not furnish any evidence to back up the claim) and called on Biya to step down: "I call on President Paul Biya to ensure a peaceful transition and avoid situations that may be ugly for Cameroon." He added: "I have received a clear mandate from the Cameroonian people . . . I want the national and international community to bear witness to this historic event that has ushered in a democratic political change in our country." Hundreds of his youth supporters marched on the streets of Yaounde, the capital. The ruling CPDM reacted by calling this premature declaration "seditious." Jean Nkuete, the CPDM Secretary-General, proclaimed that Kamto was aiming to "cause an uprising of the population to defend an imaginary victory, create an atmosphere of tension, insecurity and violence." He urged calm: "We ask all our compatriots to remain peaceful as we await the proclamation results of the election by the Constitutional Council within 15 days as provided for by the electoral code."

Conclusion

Due to an uneven playing field, the power of incumbency, the loyalty of the security services, and a divided opposition, Cameroon watchers widely expect Biya to prevail and win a seventh term when the official results are announced. In the country's last election, in 2011, Biya officially won 77 percent of the vote. But the security situation remains precarious, and the early victory announcement by Kamto could lead to a drawn-out disputed election. With tensions already high and Kamto's supporters taking to the streets, further election-related violence seems likely. International actors may need to encourage Biya to show restraint and urge all candidates to abide by the country's laws. Regardless of who prevails, outside actors should support all efforts to find a lasting solution to the Anglophone crisis. The Anglophone General Conference, organized by a group of religious leaders and currently scheduled for November 21–22, could present such an opportunity.

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Equatorial Guinea. The current capital, Malabo, is located on Bioko, an island northwest of the mainland. The future capital, Djibloho, is located on the mainland. (Source: Map by Author. Produced in ArcGIS 10.6 using the National Geographic Base Layer.)

From Malabo to Djibloho

Equatorial Guinea comprises a mainland region and several islands in the Bight of Bonny. The current capital city of Malabo is located on the island of Bioko. Geographically isolated, Malabo is closer to Cameroon than to mainland Equatorial Guinea. On the mainland, the city of Bata is the largest port and population center. In 2017, the population of Equatorial Guinea was roughly 1.27 million, with roughly 726,000 living on the mainland. The new capital is being touted as the "city of the future" complete with a six-lane highway, luxury hotel, 18-hole golf course, presidential palace, and a Formula 1 racetrack. It will also host the newly minted International University of Central Africa. When the capital is completed, more than 200,000 people are expected to live there. The construction has led to an international debate between those arguing for the need for development in Central Africa and those arguing for environmental protection. In an effort to highlight the environmental impact of building a capital in the remote interior, Global Forest Watch has mapped tree cover loss in Equatorial Guinea from 2001 to 2017. During that period, the country lost 100,000 hectares of forest (approximately 247,000 acres; this total does not include any tree cover gained).

Kingdom of Oil

A former Spanish colony, the Republic of Equatorial Guinea gained independence in 1968. In 1979, a military coup d'état led by Teodoro Obiang Nguema toppled the regime of his uncle, dictator Francisco Macías Nguema. After the discovery of vast oil reserves in the early 1990s, the country became Africa's third largest producer of oil behind Nigeria and Angola. As cash flooded the country, the regime instituted a one-party state. Obiang and his 42 acknowledged children preside over one of the world's most repressive systems. Often winning over 95 percent of the vote, Obiang has ruled for almost four decades and currently holds the title of Africa's longest serving ruler. International watchdogs point to the disparity between members of the regime, who are reported to spend lavishly outside the country, and average citizens, who subsist on less than $2 per day. Infrastructure spending accounts for 80 percent of annual governmental expenditures, with health care and education accounting for less than 3 percent.

In 2004, a failed coup against Obiang (the Wonga Coup) exposed the strategic vulnerability of the isolated island capital to internal and external threats, and President Obiang decided to relocate the capital to seek a geopolitical refuge in the rainforest. In an interview with the BBC Obiang confirmed his strategic rationale for relocating the capital to the remote interior: "We need a secure place for my government and for future governments. That's why we have created Oyala [also known as Djibloho], to guarantee the government of Equatorial Guinea." The location of Djibloho deep in the jungle provides increased geographic security, which Obiang hopes will act as a deterrent to potential coup plotters.

African Capitals on the Move

Equatorial Guinea is far from alone in moving its national capital. Several other African governments have opted to build capitals from scratch. Tanzania began the process of moving its administrative capital over four decades ago, yet the government has only recently completed the transition from Dar es Salaam to Dodoma. In 1983, the capital of Côte d'Ivoire was relocated to Yamoussoukro, the hometown of the president, Felix Houphouet-Boigny. In 1991, the government of Nigeria, seeking to pacify ethnic divisions and quell overpopulation, relocated its capital from Lagos to Abuja. Most recently, in 2017, the government of Zambia announced its intention to replace Lusaka and relocate the capital to a more centralized location. While some of these decisions were made in the name of national development, Obiang's appears to be motivated principally to preserve his power.

Conclusion

The planned relocation of Equatorial Guinea's capital may improve security for the regime, but the environmental costs may well prove high. The relocation will open up swaths of rainforest to urbanization and resource extraction, which in turn could pose ecological threats. Because the Obiang regime lacks transparency, it is likely that the scale of environmental impact will not be publicly documented.

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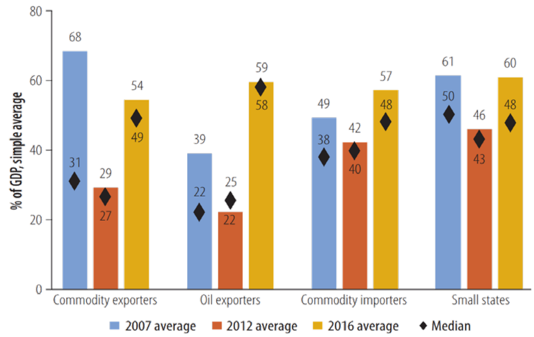
AFRICAN DEBT—A GROWING PROBLEM?

By George F. Ward

The International Monetary Fund (IMF) reported in May 2018 that 15 of Africa's 35 low-income countries are either in debt distress, meaning they cannot service their debts, or at high risk of debt distress. This announcement caused a debate over the gravity of the continent's debt problem. Although debt-to-GDP ratios currently are much lower than during the debt crisis that began in the last decade of the 20th century, aspects of the current situation are disquieting and bear examination. In particular, it is important to look at the changing composition of African debt, the capacity of governments to service their debt, and the role of China. *more...*



Public debt by resource dependence, sub-Saharan Africa. Oil exporters' public debt relative to GDP more than doubled on average between 2013 and 2016, and that of commodity importers also increased. (Source: World Bank Group, *Africa's Pulse: An Analysis of Issues Shaping Africa's Economic Future 17* (April 2018), Figure 2.8.)

Ambassador (ret.) George F. Ward is editor of Africa Watch and a Research Staff Member at the Institute for Defense Analyses.

SMOKING IN AFRICA: THE FINAL FRONTIER

By Dr. Ashley Neese Bybee

Africa's massive youth bulge and growing middle class have made it an attractive target for the tobacco industry, which views the continent as an untapped and lucrative market for cigarette sales. Academic studies and media reports have indicated that the prevalence of smoking in Africa is rising. Without effective controls and regulations imposed by African governments, what are the consequences to public health, fiscal policy, and human security? *more...*

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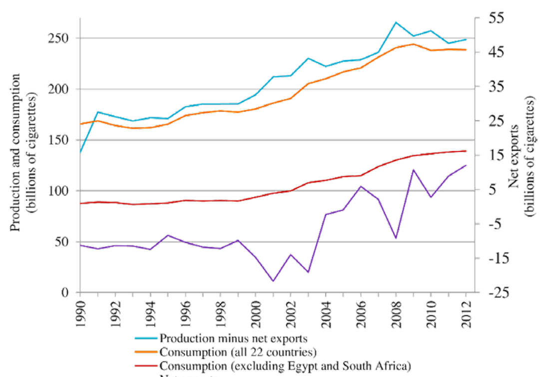

Cigarette consumption, net exports, and production less net exports, 1990–2012 in 22 African countries. (Source: Nicole Vellios, Hana Ross, and Anne-Marie Perucic, "Trends in cigarette demand and supply in Africa," *PLOS One* 13 (8): e0202467, Figure 2, https://doi.org/10.1371/journal.pone.0202467.)

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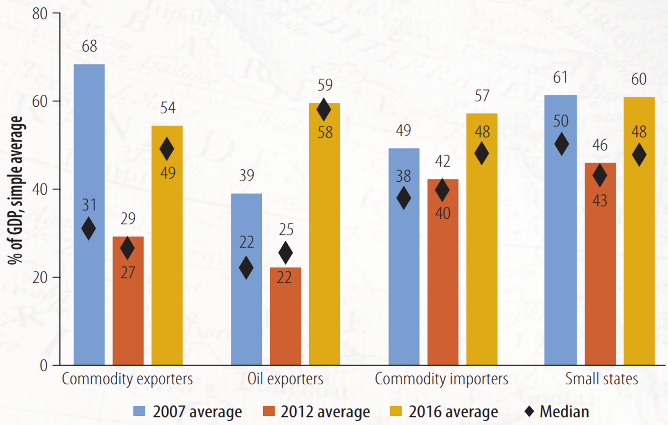

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That Was Then—This is Now

At the beginning of this century, the majority of low-income sub-Saharan African countries carried debt-to-GDP ratios greater than 75 percent. Several cases stood out, such as Ghana at 120 percent, Zambia at over 150 percent, and Mozambique at over 200 percent. These high levels of debt sparked both the Jubilee Movement to forgive poor countries' debts and the Heavily Indebted Poor Countries initiative by the World Bank and IMF. The combination of the two produced real debt relief. Through debt forgiveness, Ghana's debt ratio fell to just 12 percent in 2006. Mozambique's fell to the mid-20-percent range. The problem seemed to have been solved.

Debt levels remained relatively low until around 2012. In that year, only a handful of sub-Saharan African countries were carrying debt-to-GDP ratios above 50 percent. The absolute level of African debt had continued to grow, but their economies also expanded, keeping debt ratios within bounds.

More recently, sub-Saharan African economic growth has slowed. In 2016, real GDP growth was less than 2 percent for all sub-Saharan African countries and in negative territory due to low commodity prices for oil-exporting states. Many African countries continued to borrow even though declining growth threatened their ability to repay. The oil producers such as Angola and Nigeria were especially hard hit, as their government revenues were heavily dependent on commodity exports, which declined. The consequence is that debt ratios have risen. According to the IMF, average public debt in sub-Saharan Africa was 57 percent of GDP at the end of 2017.

Is There A Problem?

To understand the gravity of Africa's debt issues, it is useful to examine the nature of the debt burden and the capacity of governments to service that burden. High debt-to-GDP ratios alone do not create a problem. In fact, the level of debt in many industrialized countries is higher than in sub-Saharan Africa. Recently, Japan had a ratio of 253 percent; the United States, 105.4 percent; and the Euro currency area, 86.7 percent.

At the turn of the century, when debt relief was being negotiated, most African government debt was owed to multilateral institutions like the World Bank and IMF and to a few bilateral creditors that were members of the Paris Club, an informal group of 22 creditor governments that seeks to find coordinated and sustainable solutions to payment difficulties. Most lending was on concessional terms, and negotiating debt relief was a task that involved mainly governments.

More recently, as *Africa Watch* has reported, sub-Saharan African countries have increasingly turned to the international sovereign debt market for their capital needs. According to the *Financial Times*, nearly $25 billion in sub-Saharan African sovereign debt is coming due in 2018 alone. This debt is held not by governments but by a large number of private creditors, and interest rates are at market levels. Negotiating debt relief would no longer be a government-to-government affair.

The rapid growth of non-concessional lending contributed to the doubling in just two years of the burden of African government external debt payments on government revenue—from 5.9 percent of government revenue in 2015 to 11.8 percent in 2017. As levels of indebtedness have grown, the capacity of African governments to service their debt has become problematic. Simply put, African governments are failing to collect enough revenue to pay their bills. The IMF has pinpointed domestic revenue mobilization through improved taxation as one of the most pressing policy challenges facing sub-Saharan Africa. Despite some progress in revenue mobilization, sub-Saharan Africa remains the region with the lowest revenue-to-GDP ratio. The IMF estimates that there is scope to raise African tax revenues by 3 to 5 percentage points of GDP within a few years. Reaching this level will require broadening the tax base, streamlining exemptions, and strengthening the administration of value-added tax.

The Role of China

During the fall of 2018, renewed warnings from the IMF about increasing indebtedness coincided with the announcement by the government of China at the Forum on China-Africa Cooperation of a new funding package for Africa of $60 billion. Inevitably, questions have been raised about whether Chinese lending is responsible for Africa's renewed debt problem.

There is no doubt that Chinese lending has been large. According to the China–Africa Research Initiative at Johns Hopkins University, Chinese state institutions lent at least $114 billion to African governments between 2000 and 2017. That amounts to around 80 percent of lending by all other governments to Africa in the same period. Nevertheless, China holds only about 20 percent of African government external debt and only 17 percent of payments are made to China. This contrasts with 32 percent of external debt (and 55 percent of interest payments) held by private lenders and 35 percent by multilateral institutions.

Looking at the African countries currently in debt distress or at high risk, only three—Cameroon, Djibouti, and Zambia—owe more than 24 percent of their debt to China. Thus, although the burden of Chinese debt could become more of a factor in the future, it is not currently the driver of Africa debt distress.

What Is to Be Done?

According to the IMF, there is still time for African governments to focus on four key areas to alleviate their debt-related challenges:

- Resource-intensive countries, especially the oil exporters, need to control government costs through fiscal consolidation and increase revenues through economic diversification.
- Other countries can achieve the needed fiscal adjustment through steady increases in tax revenues.
- All African countries need to improve their management of debt, avoiding borrowing wherever possible.
- All governments must improve prospects for private investment by strengthening regulatory frameworks, stimulating intra-African trade, and deepening access to credit.

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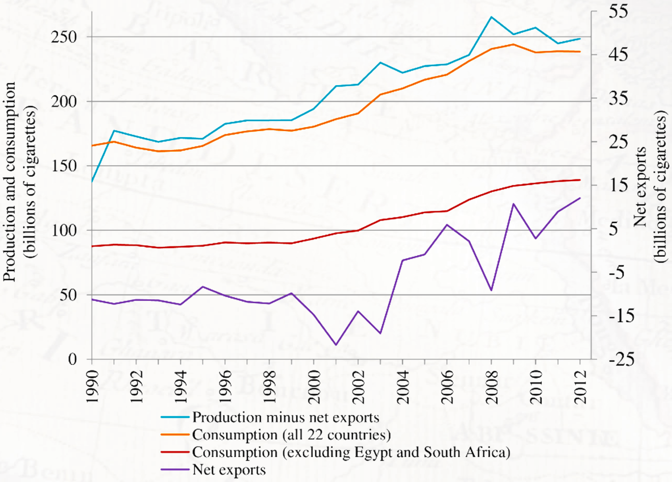

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Pivot to Africa

As far back as 1990—in the midst of a declining world market—British American Tobacco (BAT) identified Africa as a target of opportunity for its cigarette sales. By 2009, BAT, Philip Morris, and the United Kingdom's Imperial Tobacco were regularly criticized for their tactics to hook children through the sale of inexpensive single cigarettes. Today, the tobacco industry continues to be condemned for sponsoring youth-oriented events, selling single cigarettes alongside candy, and hiring young and attractive "cigarette girls" to sell their products.

In addition to targeting at-risk populations, tobacco companies are aggressively attacking governments that they believe are actively violating international trade and investment treaties, even though those actions are aimed at limiting the harm caused by smoking. In at least four African countries (Namibia, Gabon, Togo, and Uganda) governments have received warnings from the tobacco industry that their national laws regulating tobacco products violate international treaties. This is part of a concerted campaign to limit government regulations on tobacco products.

What Do the Data Say?

Although the overall prevalence rate of smoking in Africa is still relatively low, numerous studies show that tobacco use, particularly among youth, has been increasing rapidly over the past two decades. Media reports also claim that smoking is on the rise in Africa. In 2013, a committee of experts convened by the Network of African Science Academies concluded that a "tobacco-related disease epidemic" may well be in the making, given that smoking in Africa is expected to increase by nearly 39 percent by 2030, the largest increase of all regions worldwide. Likewise, the World Health Organization (WHO) projects that by 2025, smoking rates will go up from 2010 levels in 17 of the 30 African countries submitting data.

Benin, Burkina Faso, Cameroon, Republic of the Congo, Lesotho, Mali, Mauritania, and Sierra Leone are among the countries that may experience the greatest increase in tobacco consumption if efforts to control tobacco use continue at their current level. A few countries, such as South Africa, are projected to decrease due to effective measures adopted by the government to regulate tobacco use. These are projections, not predictions, and therefore do not account for initiatives or interventions that governments may launch to regulate the tobacco industry or dissuade young smokers in those countries.

What Could Happen?

If the current trend continues unabated, the affected countries could face not only a serious public health challenge, but another byproduct of the market—an accompanying illicit trade in cigarettes.

Cigarettes are the most widely smuggled legal product in the world and can be categorized as contraband if unregulated (i.e., duties and excise taxes not paid) or counterfeit (manufactured without authorization of the rightful owners, with intent to deceive consumers and to avoid paying duty). The reason for this is simple economics—consumers want less expensive products (creating the demand); criminals take advantage of the relatively low risk of getting caught. They can make massive profits by not paying the high taxes on the product. In one report from South Africa, where "taxes of at least R 17.85 (Rand) have to be paid on every pack," 20 cigarettes sold for as little as R 5 ($0.35). In Africa, impoverished consumers will opt for these cheaper products, creating a significant market for illegal cigarettes.

What to Expect from an Illicit Cigarette Market

An increased illicit trade in tobacco products potentially affects the rate of consumption and public health. Cheaper cigarettes would allow more consumers access to the market; an increase in the number of smokers would be accompanied by an increase in established health concerns. Moreover, illicit cigarettes do not adhere to legal requirements for health warnings, do not publish tar and nicotine levels, and are not withheld from minors. Finally, unknowing smokers are often consuming products whose production has not been regulated and that may contain much higher levels of tar and carbon monoxide than genuine products. Some studies have even reported finding arsenic and rat droppings in illicit cigarettes.

Lost revenue to governments from excise or value-added tax is another inevitable effect of illicit cigarette sales. Last year, BAT estimated that the South African government lost R5 billion (approximately $351 million) in unpaid taxes. The Tobacco Institute of Southern Africa (a lobbying firm for the tobacco industry in South Africa) similarly estimates that since 2010 the South African government has lost over R27 billion (almost $2 billion) in unpaid taxes due to illegal cigarettes. African governments can ill afford to lose these revenues.

Finally, cigarette smuggling is notorious for resourcing organized crime and terrorist networks in Africa. Al Qaeda's "Marlboro Man," Mokhtar Belmokhtar, was able to lead a major insurgency in the Sahel that was financed largely by illegal cigarette sales. These networks do not subsist on cigarette smuggling alone, however, and typically engage in an array of illicit activities, including human, narcotics, and arms trafficking or hijacking.

Conclusion

Tobacco companies are actively targeting the African market, which means that governments need to consider imposing and enforcing regulatory and legal frameworks to avoid the increased smoking rates that the WHO projects. There will inevitably be resistance from the tobacco industry, as has already been experienced in the Democratic Republic of the Congo, Burkina Faso, Ethiopia, Togo, Gabon, and Namibia. One area in which governments and industry have a mutual interest is in combatting the sale of illicit cigarettes. To that end, BAT has adopted a comprehensive approach to fighting the sale of illegal tobacco products, one that focuses on maintaining an effective internal governance and supply-chain security, working with authorities to ensure that appropriate enforcement action is taken, and gathering commercial information on the illegal trade. Tobacco companies should therefore be viewed not only as the instigators of this complicated public-policy debate, but also as part of the solution.

Dr. Ashley Neese Bybee is a Research Staff Member in the Africa Program at the Institute for Defense Analyses.

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FISHERIES CRISIS: THE CASE OF SENEGAL AND MAURITANIA

By Austin Swift


Pirogues in St. Louis, Senegal. (Source: Ji-Elle [Public domain], from Wikimedia Commons, https://commons.wikimedia.org/wiki/File:Saint-Louis-du-S%C3%A9n%C3%A9gal.JPG.)

Once regarded as a fisherman's paradise, the waters off the Atlantic Coast of West Africa have seen a dramatic decline in fish stocks. Decades of overfishing, illegal trawling, and rising Chinese demand have devastated the once abundant fishing grounds. Faced with a shortage, West African fishermen are increasingly venturing farther offshore in search of the daily haul. The rapid growth of both small-scale and commercial fishing has strained coastal communities and jeopardized the food security of West Africa. Recently, incursions by Senegalese fishermen into Mauritanian territorial waters have led to violence. In January 2018, the Mauritanian coastguard opened fire on a Senegalese fishing boat, killing a Senegalese fisherman. In July, Senegal and Mauritania agreed to a new fishing accord. Is a diplomatic agreement enough to quell mounting animosity? *more...*

Austin Swift is a Research Associate in the Africa Program at the Institute for Defense Analyses.

UNVEILING THE EVOLVING FACE OF TERROR: WILL ISIS MOBILIZE FEMALE JIHADIS IN AFRICA?

By Sarah Daly

Women demonstrate outside the Tunisian parliament, in Tunis, Saturday, December 24, 2016, with banner reading "No to Terrorism." Tunisia has the dubious distinction of being one of the world's primary exporters of jihadi fighters, and now as extremists suffer defeats on the battlefield, many Tunisian people fear what will happen when Jihadis return to this vulnerable country.(Source: AP Photo/Ons Abid.)

On October 29, 2018, 30-year-old Mna Guebla approached a group of police on the Avenue Habib Bourguiba in Tunis and detonated a homemade bomb, killing herself and wounding 26 others. Before the attack, she had sworn allegiance to the Islamic State in Iraq and Syria (ISIS). Guebla was the first female suicide bomber to strike Tunisia, and her attack ended the capital city's fragile three-year reprieve from terror. More pressingly, the attack highlighted an evolving terror threat in Africa—the increased mobilization of women in ISIS to coordinate and participate in violent attacks. *more...*

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Pirogues in St. Louis, Senegal. (Source: Ji-Elle [Public domain], from Wikimedia Commons, https://commons.wikimedia.org/wiki/File:Saint-Louis-du-S%C3%A9n%C3%A9gal.JPG.)

Fishing Is Life

Fed by the Canary current, the marine ecosystem from Morocco to Sierra Leone is often regarded as one of the most fertile fishing zones in the world. Fish is a culinary staple across West Africa, with an estimated 6.7 million people depending on small-scale fisheries for sustenance. Exported inland to Mali and Burkina Faso, fish provide landlocked West Africa with an inexpensive protein source. Economically, illegal fishing is costing West African economies more than $2 billion in annual revenue due to poor regional coordination. According the United Nations' Food and Agriculture Organization, more than 90 percent of Senegal's fish resources are on the brink of collapse. In the northern city of St. Louis, small-scale fishermen have experienced a sizable drop in the quantity of fish being caught, down from 75 million kilos in 2015 to less than 20 million in 2017.

Illegal, Unreported, and Unregulated Fishing

While climate change has also been cited as contributing to the decline of fish stocks, the surge of illegal, unreported, and unregulated (IUU) fishing is robbing West Africa of its marine wealth. The presence of foreign trawlers, primarily from China, has overwhelmed the fisheries off the coast of Senegal and Mauritania. In 2015, Greenpeace reported that Chinese fishing boats were taking advantage of the lack of governance and weak enforcement in the region, as Chinese operations in Africa soared from a dozen in 1985 to more than 450 ships in recent years. In 2017, the Senegalese Navy intercepted seven Chinese vessels illegally trawling off the coast of the Casamance region. Under Senegal's fishing code, foreign vessels apprehended face cargo confiscation and heavy fines. China is not the only offender—vessels from the European Union and Russia have also been seized. Beijing has responded by canceling subsidies and permits for its oceangoing fleets that engage in IUU fishing. Interdictions of illegal fishing vessels are the exception rather than the norm, and IUU fishing continues to drain West Africa of vital revenue streams. In 2018, 25 percent of fish caught were traced to IUU fishing practices, presenting a daunting challenge to long-term sustainability.

Capitalizing on their rich fishing grounds, Mauritania has courted fishery deals with neighboring countries and with Russia, Japan, and the European Union. In exchange for commercial access to fishing grounds and ports, the deals provide Mauritania with needed revenue. Demand for fishmeal, a commercial product made from fish, is further straining depleted stocks. From Norway to China, fishmeal is feeding the growing aquaculture industry, and West Africa is seen as a primary source. The growing demand from China has led the price of fishmeal to skyrocket. Environmentalists are concerned about pollution and the potential impact of factories along the West African coast.

Rising Tensions

Fisheries issues have resulted in increasing conflict between Mauritania and Senegal, adding to pre-existing tensions. Ethnic and land-tenure disputes led to a border war between the two countries from 1989 to 1991. Eager for profits, both countries have invested heavily in the seafood sector. Senegal has poured money into its small-scale fishing fleet, while Mauritania routinely grants fishing licenses to foreign operators and hosts large seafood-processing centers. In January 2016, Mauritania closed its fishing grounds to Senegalese vessels, demanding that all fisherman be Mauritanian nationals and all fish caught be processed in Mauritanian ports. Unwilling to accept, Senegal refused and a previous agreement expired in 2016.

In October 2017, the Mauritanian coast guard arrested more than 70 Senegalese fishermen, detaining them in the capital, Nouakchott. In early 2018, a 19-year old Senegalese fisherman was killed. In response, Senegal deployed a warship, and riots broke out in the Senegalese coastal city of St. Louis, with Senegalese nationals attacking Mauritanian shopkeepers and looting businesses. In February, Senegalese President Macky Sall visited Nouakchott to discuss escalating tensions with the Mauritanian President, Mohamed Ould Abdel Aziz. By July, a new fishing accord was signed between Senegal and Mauritania, reinstating the licenses of small-scale Senegalese fisherman and those working in the fishmeal processing centers of Nouakchott. Under the accord, Senegalese fishermen will be permitted to catch 50,000 metric tons of fish with 400 boats in a renewable one-year deal. The fresh accord states that Senegal will pay Mauritania 15 euros for each ton of fish caught within its maritime boundary. As stocks continue to fall, the question remains whether the new accord can help to curb escalating friction.

Conclusion

The future of the Atlantic Coast fish population depends on increased environmental management, international cooperation, and security enforcement against IUU fishing operations. The governments of Senegal and Mauritania would be well advised to continue to collaborate on shared environmental and economic concerns.

Austin Swift is a Research Associate in the Africa Program at the Institute for Defense Analyses.

UNVEILING THE EVOLVING FACE OF TERROR: WILL ISIS MOBILIZE FEMALE JIHADIS IN AFRICA?

By Sarah Daly

On October 29, 2018, 30-year-old Mna Guebla approached a group of police on the Avenue Habib Bourguiba in Tunis and detonated a homemade bomb, killing herself and wounding 26 others. Before the attack, she had sworn allegiance to the Islamic State in Iraq and Syria (ISIS). Guebla was the first female suicide bomber to strike Tunisia, and her attack ended the capital city's fragile three-year reprieve from terror. More pressingly, the attack highlighted an evolving terror threat in Africa—the increased mobilization of women in ISIS to coordinate and participate in violent attacks.

Women demonstrate outside the Tunisian parliament, in Tunis, Saturday, December 24, 2016, with banner reading "No to Terrorism." Tunisia has the dubious distinction of being one of the world's primary exporters of jihadi fighters, and now as extremists suffer defeats on the battlefield, many Tunisian people fear what will happen when Jihadis return to this vulnerable country.(Source: AP Photo/Ons Abid.)

The Situation in Tunisia

Despite its initial growth following the country's democratic revolution in 2011, Tunisia's economy has stagnated due to a fraught political landscape and regional instability. The World Bank notes that "youth and women have been particularly affected by the lack of economic opportunity: Tunisia is one of the few countries where a higher level of education decreases employability, in particular for women." This downturn has motivated thousands of Tunisians to flee to Europe and enabled terrorist groups like ISIS and al-Qaeda in the Islamic Maghreb (AQIM) to successfully recruit and operate there. Nearly 6,000 Tunisians left their country to join ISIS in Iraq and Syria from 2014 to 2017. Guebla was an unemployed college graduate struggling to find work outside her family's pastoral enterprise. She spent the bulk of her time alone at her computer, which her family believed she used to study and search for jobs. It appears that she was instead drawn into the Islamic State online. She communicated with local and foreign terrorist leaders and eventually implemented instructions to construct a bomb and carry out an attack.

Since 2015, terror activity in Tunisia has been concentrated in the western mountainous region that borders Algeria and the eastern coastal areas near Libya. The anticipated and feared influx of returning male ISIS fighters has not materialized. Most of the several hundred who have returned to Tunisia are imprisoned. The challenge of what to do with returning women and children, however, remains complicated, because the distinction between victim and terrorist can be difficult to discern.

Expanding Roles for Women in ISIS

Islamist extremist groups have often restricted women to auxiliary roles. Women in groups like ISIS and al Qaeda have excelled at enlisting new members, directly online and indirectly through propaganda campaigns. Repatriated female ISIS collaborators still pose a significant threat in the diaspora, because the value of orchestrating disparate attacks via the internet increases as ISIS loses physical territory and decentralizes. Women affiliated with ISIS may also feel empowered to move beyond recruitment to engage in violent jihad following the group's 2017 endorsement of this escalation.

Boko Haram, the violent Islamist insurgency in northeast Nigeria, has used young female suicide bombers since 2014. In fact, Boko Haram is the only Islamic extremist group in which females carry out the majority of suicide attacks. Boko Haram's use of gendered violence and abduction echoes other violent insurgencies in central Africa, but diverges from the ideology of many Islamist groups. It utilizes female suicide bombers strictly for their strategic appeal, often resorting to coercion, and in doing so subverts the concept of a jihadist martyr. Boko Haram has capitalized on the once predominant "security bias" (whereby women are suspected and scrutinized less because they are assumed to be nonviolent or victims), which has had the opposite effect—some Nigerians are now overly suspicious of young women in hijabs. This strategy has been a potent tool for advancing the group's goal of eroding civil and social structures. But its distortion of jihadism contributed in part to the fracture of the group from ISIS in 2017.

ISIS leadership has historically been unwilling to upend its ideological opposition to women participating in violent jihad. The benefits of a stable and rigid social order in the Islamic State gained by enforcing a strict gender binary outweighed any tactical advantages that female fighters provide. In 2017, as the caliphate unraveled, ISIS deployed female bombers during the battle of Mosul. Some interpreted this as an indication that ISIS was depleted and dipping into its reserve force. This explanation reflects patterns established by al-Qaeda and Hamas, who weaponize women only as a last resort and primarily to shame men into joining the fight.

Despite the doctrine, ISIS affiliates in Africa and Asia fielded women in suicide attacks before Mosul and Raqqa fell. In 2016, three women attacked a police station in Kenya. In 2017, women and entire families, small children included, carried out attacks on soft targets in Bangladesh and Indonesia. Likewise, the al-Qaeda–associated group al-Shabaab has frequently utilized female militants, where they have benefited significantly from the positive security bias in Kenya and Somalia. These incidents could signal that satellite terror groups in Asia and Africa are more willing to depart from "official" doctrine to employ tactical strategies that further their agenda.

To compound this trend, ISIS leadership has relaxed its original stance on the issue. In 2017, ISIS magazines aimed at women, such as *al-Naba* and *Rumiya*, softened rhetoric discouraging women from joining combat operations. Both magazines included profiles of famous contemporary and historic female Muslim warriors. Explicit statements urging women to prepare to take up arms soon followed. This past February, an ISIS video depicted figures in burkas fighting alongside men, and while it is unclear if these are women or men dressed as women, the public relations message departs from the ISIS status quo. The sum of these shifts suggests that the Islamic State is mobilizing women toward violent jihad.

Remaining Alert to the Threat

Guebla's attack in Tunis may be an aberration, but it could also presage a proliferation of female suicide attacks in regions across the continent where the Islamic State is active. In countries like Tunisia, it will be important to implement a comprehensive de-radicalization and reintegration strategy for returning ISIS members, including women, to help mitigate the potential for increased radicalization in their home communities. Nations can learn from the challenges of Nigeria's attempts to stem the tide of Boko Haram's female suicide bombers. Furthermore, as its stronghold in Iraq and Syria diminishes, understanding where and how ISIS operations are changing will help vulnerable areas like North Africa to bolster their security and resilience to potential threats.

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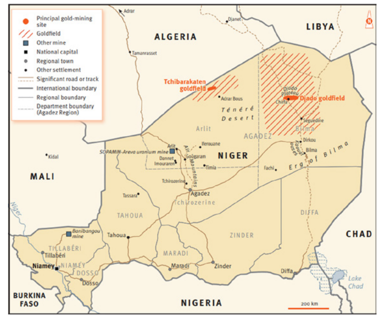
NIGER: THE GOLDEN DESERT

By Dr. Ashley Neese Bybee

The Wall Street Journal recently published a story highlighting the plight of 35,000 Africans who have left their homes in West and Central Africa in search of gold in the desolate, dangerous Sahelian country of Niger. The article documents the "Gold Rush" that Niger has experienced since 2014, when the precious metal was found in the Djado region near its northern border with Libya and at Tchibarakaten, a town on its northern border with Algeria. As is well documented, natural resources may be both a blessing and a curse. At best, resources offer opportunities for growth and development. But depending on a government's ability to control access to the resource and manage revenues effectively, they can also lead to conflict, corruption, and criminal activity. For the government of Niger, whose financial and security institutions are weak and whose presence in the North is limited, effectively overseeing the gold mines presents a challenge. *more...*



Goldfields of northern Niger. (Source: Mathieu Pellerin, "Beyond the 'Wild West': The Gold Rush in Northern Niger," SANA Briefing Paper, June 2017, Map 1, https://tinyurl.com/ybxg6s5p.)

Dr. Ashley Neese Bybee is a Research Staff Member in the Africa Program at the Institute for Defense Analyses.

COMOROS—A TROUBLED ARCHIPELAGO

By Sarah Daly

On Sunday, October 14, 2018, a group of about 40 armed rebels on the Comorian island of Anjouan seized control of the Mutsamudu city's medina quarter. The insurgents oppose the recent constitutional referendum that they believe undermines the democratic balance in Comoros. After a six-day siege, the Comorian military succeeded in retaking control on Saturday, October 20. This latest separatist rebellion in Anjouan follows a year of political upheaval in which Comorian president Azali Assoumani has moved to consolidate power and crack down on dissent, plunging the tiny archipelago nation into political crisis. *more...*

Map showing islands of Comoros. Note that Mayotte is administered by France but claimed by Comoros. (Source: Wikimedia Commons, https://tinyurl.com/ybjaxqk5.)

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About IDA

The Institute for Defense Analyses is a non-profit corporation operating in the public interest.

IDA's three federally-funded research and development centers provide objective analyses of national security issues and related national challenges, particularly those requiring scientific and technical expertise.

IDA's Africa team focuses on issues related to political, economic, and social stability and security on the continent.

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IDA AFRICA WATCH

ANGOLAN DIAMONDS—THE CHALLENGES OF RESOURCE REFORM

By Sydney Deatherage

Since September 2018, in a crackdown targeting illicit and informal mining and trading operations in Angola's diamond-rich provinces, 300,000 Congolese migrants have returned from Angola to the conflict-ridden Kasai region of neighboring Democratic Republic of the Congo. Humanitarian organizations have documented violent expulsions and deaths. Following a new diamond policy issued in July, the fallout from this second step of diamond sector reforms in Angola, named "Operation Transparency," highlights a dilemma that many poor, resource-rich states pursuing similar reforms face. Addressing illicit economic activities may exacerbate underlying problems and result in increased flows of refugees and internally displaced persons, instability, and corruption associated with rents derived from natural resources. How can Angola effectively manage reform of its diamond-mining sector? *more...*

Aerial photo of Catoca diamond mine, Angola's largest. (Source: NASA image created by Jesse Allen, using data provided courtesy of NASA/GSFC/METI/ERSDAC/JAROS, and the U.S./Japan ASTER Science Team, https://tinyurl.com/yang8cz4.)

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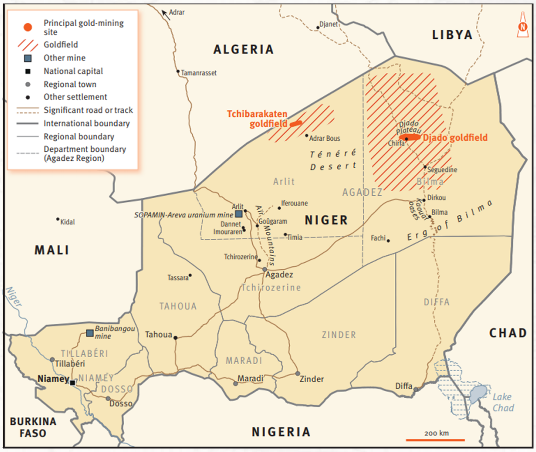
The Wall Street Journal recently published a story highlighting the plight of 35,000 Africans who have left their homes in West and Central Africa in search of gold in the desolate, dangerous Sahelian country of Niger. The article documents the "Gold Rush" that Niger has experienced since 2014, when the precious metal was found in the Djado region near its northern border with Libya and at Tchibarakaten, a town on its northern border with Algeria. As is well documented, natural resources may be both a blessing and a curse. At best, resources offer opportunities for growth and development. But depending on a government's ability to control access to the resource and manage revenues effectively, they can also lead to conflict, corruption, and criminal activity. For the government of Niger, whose financial and security institutions are weak and whose presence in the North is limited, effectively overseeing the gold mines presents a challenge.



Goldfields of northern Niger. (Source: Mathieu Pellerin, "Beyond the 'Wild West': The Gold Rush in Northern Niger," SANA Briefing Paper, June 2017, Map 1, https://tinyurl.com/ybxg6s5p.)

Background

In Niger, gold mining is a small-scale industry. Mines are largely owned by members of the political and military elites. They assemble teams to do the work and pay minimal wages while keeping the vast majority of revenues generated. The Observatory for Administrative Monitoring of Gold Mining Activities, established in 2014 and located in the central Nigerien city of Agadez, has the task of regulating mining in the region. It disburses mining licenses and dictates where miners may dig. Operating without a license or in an unauthorized location is illegal, but the government's limited capacity to monitor every mine and enforce the law results in widespread criminality. Safety standards are nonexistent in practice.

Djado

The plateau of Djado was the first area to attract prospectors in 2014. Once gold was discovered, the region experienced a massive influx of people seeking their fortunes. Around Djado, the population grew from 800 to 40,000 from 2014 to 2015, with most coming from Chad, Sudan, and Libya. A concomitant increase in commercial activity arose to feed, house, and service the growing population, as well as to provide transportation and other logistics to support the mining industry. The Nigerien government tasked the army and internal security forces to secure the mines in the region. In April 2017, however, the Nigerien government closed the mines in Djado following a flare-up in violence between various armed groups competing for control.

Tchibarakaten

In 2014, the country's largest goldfield was discovered in Tchibarakaten, a town near the border with Algeria. This mine witnessed an increase in activity in 2015 when, under pressure from the European Union (EU) the Nigerien government passed a law to counter human smuggling. Specifically, it forbade the movement of foreigners north of Agadez to Libya. As a result, smugglers shifted their route to pass through the Tchibarakaten region and onto Algeria. Consequently, Tchibarakaten saw the arrival of a new type of miner-migrants seeking to raise funds for their onward journey to Europe. The Nigerien Ministry of Mines estimates that approximately 35,000 people have relocated from West and Central Africa to the area around Tchibarakaten over the last two years.

Unlike in Djado, most mine owners and workers in Tchibarakaten (other than those who are migrants transiting the region) are Nigerien. Moreover, most mine owners are Tuareg elites from Agadez and Arlit who were either directly or indirectly involved in the last Taureg rebellion in Niger in 2007–2009. One analysis of this arrangement suggests that it reflects a strategic decision made by the Nigerien government to permit the rebellion-inclined Tuaregs to retain control of the lucrative mines, the idea being that the income would contribute to economic growth and development in the region, thus decreasing risk of future instability.

Concerns

Gold mining in Niger warrants several causes for concern. First, mining activities, under the current arrangement, can give rise to conflict in numerous ways. Djado was closed in 2017 following a flare-up in violence between various armed groups competing for control of the lucrative mine. Other sources of conflict have included breaches of contract, retaliation for theft, and general banditry. Intercommunal violence has also arisen among ethnic groups that have banded together for self-protection.

There has also been some hostility between local and foreign miners, particularly in Djado where many of the best skilled, best equipped, and best armed miners are foreign. Their relative success has generated resentment among locals, and the Nigerien state has responded to local complaints by deporting hundreds of foreign miners to their countries of origin. The Small Arms Survey also reports a proliferation in arms trafficking corresponding with the opening of the gold mines. The survey further submits that the numerous "Gold Barons" are associated with trafficking networks in the region.

Second, the situation in Djado and Tchibarakaten offers opportunities for corruption, extortion, and other malpractices by the military, which has been tasked with securing the mines. In Djado, the army has been reportedly extorting foreign miners or seizing their equipment for resale. In Tchibarakaten, some soldiers have found opportunities for personal enrichment by charging exorbitant fees for miners' convoy protection. These northern postings are now among the most appealing army assignments due to the enrichment opportunities.

Third, Niger and Algeria have experienced heightened tensions in the last several years, primarily over the Algerian government's decision in 2016 to construct a berm on its border with Niger to prevent migrants from crossing into its territory. More recently, illegal gold mining in Algeria has become a source of tension, with Algerian security forces arresting and incarcerating foreigners illegally mining on Algerian territory.

Finally, there is the safety issue. The unregulated mines average one death per month, with many more serious injuries occurring.

Conclusion

The recent increase in population around Tchibarakaten presents opportunities for traders and entrepreneurs to provide equipment and services to mine operators and workers, such as lodging, food options, and public baths. There are now legal opportunities for traditional smugglers, whose livelihoods have been negatively affected by the government's efforts to enforce the law against human trafficking, to diversify their sources of income. To that end, many are reported to be providing goods and services to miners, including their transportation around the vast territory.

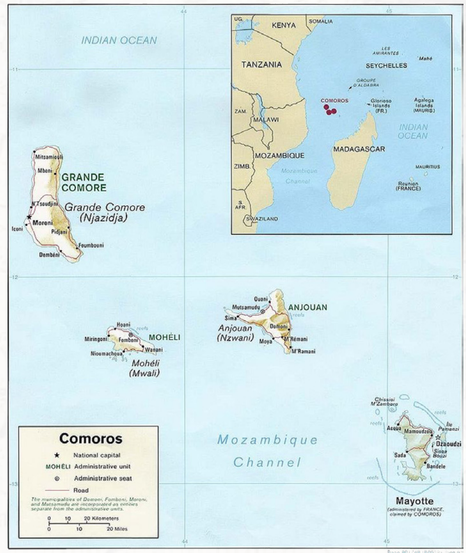
Alongside these opportunities are risks. Research shows that densely concentrated resources in loosely governed spaces pose dangers. In the case of Djado and Tchibarakaten, the location of gold mines more than 800 miles from Niamey presents a major challenge for the state. Although there is a presence of the Nigerien army and internal security forces, they are undermanned and under-resourced. As part of its security strategy, the government of Niger might implement measures to regulate gold mining to protect workers and produce the tax revenues desperately needed for national development.

Dr. Ashley Neese Bybee is a Research Staff Member in the Africa Program at the Institute for Defense Analyses.

COMOROS—A TROUBLED ARCHIPELAGO

By Sarah Daly

On Sunday, October 14, 2018, a group of about 40 armed rebels on the Comorian island of Anjouan seized control of the Mutsamudu city's medina quarter. The insurgents oppose the recent constitutional referendum that they believe undermines the democratic balance in Comoros. After a six-day siege, the Comorian military succeeded in retaking control on Saturday, October 20. This latest separatist rebellion in Anjouan follows a year of political upheaval in which Comorian president Azali Assoumani has moved to consolidate power and crack down on dissent, plunging the tiny archipelago nation into political crisis.



Map showing islands of Comoros. Note that Mayotte is administered by France but claimed by Comoros. (Source: Wikimedia Commons, https://tinyurl.com/ybjaxqk5.)

A Legacy of Political Upheaval

Since its independence from France in 1975, Comoros has struggled with threats to its stability. The October insurrection in Anjouan is the third such uprising on the island and the second to require military intervention. In 1997, Anjouan seceded from Comoros and attempted to rejoin the French Republic. In 1999, after France rejected this overture, the island underwent a change in leadership. In 2001, a coup replaced the separatist command with junta leader Mohamed Bacar. Anjouan rejoined the Comoros later that year, and Bacar became president of the newly minted Union of the Comoros in 2002. The 2001 Fomboni Joint Declaration, which reunified the islands, established a presidency in which power rotates among each of the three main islands for five-year terms. But Bacar refused to step down at the end of his term in 2007. After protracted and failed international attempts to restore national unity, a joint military operation intervened to depose him in 2008.

Despite occasional bouts of instability, Comoros has enjoyed relative calm for most of the last decade. In the past year, however, President Azali Assoumani has consolidated his power through measures that have eroded the nation's democratic institutions and individual liberties. In April, he suspended the nation's highest court, the Constitutional Court. In July, a constitutional referendum resulted in changes that effectively nullified the rotating presidency structure, eliminated the vice president positions occupied by the elected governors of each of the other two islands, established Sunni Islam as the official state religion, and transferred judicial responsibilities from the Constitutional Court to the Supreme Court.

Another Leader for Life?

Despite serious concerns about the validity of the referendum, the changes have been instituted, prompting criticism and concern from internal opposition groups, international organizations, and regional bodies. In the wake of the referendum, the African Union attempted to mediate discussions between President Assoumani and opposition leaders to restore democratic order. Assoumani's suspension of the dialogue on October 2 led to a further deterioration of the political climate. Opposition leaders have been jailed and subjected to mistreatment; others have fled altogether. Assoumani's subsequent call for new elections could allow him to extend his tenure eight years beyond his original term's completion in 2021. This prospect aligns Assoumani with a number of other African leaders who have abolished or manipulated term limits to remain in power.

In the Shadow of Saudi Arabia

By establishing Sunni Islam as the official state religion, Assoumani has constrained religious liberty in the archipelago. Comoros is an overwhelmingly Sunni Muslim country, but this new trajectory shifts the country away from its once "tolerant and pragmatic" culture and toward a strict singular observance of Sunni tradition. The state sanctioning of Sunni Islam has implications beyond curtailing civil and religious liberties, including signaling Assoumani's commitment to economic and political partnership with Saudi Arabia. An unconfirmed report states that Saudi Arabia financed the July referendum.

While Comoros may benefit by solidifying socio-religious connections to Saudi Arabia, Assoumani may also rely on these ties to lessen the political clout of opposition party leader and former president Ahmed Abdallah Sambi. Called "The Ayatollah of Comoros" for his predilection for Iran, where he was educated, Sambi himself is a Sunni Muslim cleric. He is currently imprisoned for the alleged embezzlement of large sums earned in a passport-sale program with the United Arab Emirates. This scheme implicated hundreds of Iranians who paid to surreptitiously acquire Comorian passports. Assoumani may need the external support to legitimize the accusations against his top internal adversary. Despite his incarceration, Sambi remains the figurehead of the opposition party.

And although Comoros is not currently considered a hotbed of extremism, its proximity to nascent activity in northern Mozambique and Madagascar, countries connected to Comoros via well-established trafficking and illicit networks, put it at risk. In the past, Comoros's connections to international terrorism have included high-profile individuals, including Abdallah Mohammed Fazul, who played roles in the 1998 Nairobi embassy bombings and 2002 Mombasa tourist attacks. Comoros was also flagged by the U.S. Treasury as the location of a Saudi Arabian foundation linked to terror, and it has been scrutinized for its lack of enforcement of UN standards to combat terror financing. Should Comoros continue or increase its laxity in this area, it could further isolate itself from Western countries.

The Fallout

In April, when Assoumani disbanded the independent Constitutional Court, critics decried the move. Preliminary conjecture that this move aimed to preempt resistance to his "power grab" proved true when the July referendum shifted the responsibilities of the Constitutional Court to the Supreme Court, whose justices are presidentially appointed and disposed to legitimize his agenda. The government has reacted harshly to protests since the referendum. Politicians and journalists have been arrested. The government overturned parliamentary immunity for three MPs by means of a vote designed to circumnavigate opposition. In the absence of the Constitutional Court or a functioning parliament, the citizens of Comoros have few means by which to challenge these changes.

Comoros is small, with a population estimated at around 800,000. This can make local political issues seem contained, but Comoros sits at a strategic location in the Mozambique Channel. This region has recently seen a resurgence in piracy, with worrisome signs that pirates may be cooperating with terrorist organizations. Comoros is prone to providing passports and flags to individuals and enterprises seeking to skirt international and U.S. law, and this latest turn away from democracy amplifies the risk that a lawless or hostile Comoros could pose in the region. India and China have jostled for influence in this area in recent years, and with economic ties to Saudi Arabia and the United Arab Emirates, Comoros finds itself surrounded by foreign actors whose interests may be better served by a friendly authoritarian regime than by a democracy.

Even though the rebellion on Anjouan has been quelled for now, prospects for long-term peace in Comoros are not promising. Assoumani seems bent on repressive rule. The country is exposed to manipulation by foreign interests and exploitation by criminal syndicates and extremists. Despite its small size and isolated location, Comoros merits international attention.

Sarah Daly is a Research Associate in the Africa Program at the Institute for Defense Analyses.

ANGOLAN DIAMONDS—THE CHALLENGES OF RESOURCE REFORM

By Sydney Deatherage

Since September 2018, in a crackdown targeting illicit and informal mining and trading operations in Angola's diamond-rich provinces, 300,000 Congolese migrants have returned from Angola to the conflict-ridden Kasai region of neighboring Democratic Republic of the Congo. Humanitarian organizations have documented violent expulsions and deaths. Following a new diamond policy issued in July, the fallout from this second step of diamond sector reforms in Angola, named "Operation Transparency," highlights a dilemma that many poor, resource-rich states pursuing similar reforms face. Addressing illicit economic activities may exacerbate underlying problems and result in increased flows of refugees and internally displaced persons, instability, and corruption associated with rents derived from natural resources. How can Angola effectively manage reform of its diamond-mining sector?

Aerial photo of Catoca diamond mine, Angola's largest. (Source: NASA image created by Jesse Allen, using data provided courtesy of NASA/GSFC/METI/ERSDAC/JAROS, and the U.S./Japan ASTER Science Team, https://tinyurl.com/yang8cz4.)

From Oil to Options

Angola is Africa's second largest producer of oil, but after years of production growth, global price drops in 2014 hit hard. Oil currently makes up over 95 percent of Angolan exports ($22.6 billion), but production is located almost exclusively offshore and contributes little to the welfare of most Angolans. Under President João Lourenço, elected in September 2017, Angola has sought to diversify its economy and reduce dependency on oil revenues. Lourenço has worked to attract investment and develop agriculture, tourism, industry, and other sectors. A central element of Lourenco's economic agenda has been his attempted reform of the diamond sector. At $1.91 billion, diamonds are Angola's second largest export. Angola's diamond sector has never been well developed, although there have been recent efforts to invest in infrastructure in the diamond-rich provinces in northeastern Angola. Angola is the world's fifth-largest producer of diamonds, producing an estimated 7 percent of the world's diamonds, 70 percent of which are of high quality. With 60 percent of the country's diamond resources unexplored, developing the sector could result in an influx of foreign-exchange reserves, stimulation of the private sector, infrastructure development, an increase in public revenue, and employment opportunities.

A New Deal for Diamonds

Angola's previous diamond-sector policy posed unfavorable investment terms for international mining companies. The state mandated that all diamond producers sell stones to the state-owned diamond trading company Sodiam, which then channeled diamonds to "preferential buyers" who were often politically connected. Buyers generally negotiated sales far below market value. For the past six years, diamonds from Catoca, Angola's largest diamond mine, were sold on average at 24 percent below market prices, an aggregate loss of nearly $500 million. The policy resulted in less revenue for individual miners and less tax revenue for the Angolan government. It also encouraged illegal trading of diamonds, with artisanal miners turning to criminal diamond "bosses" to sustain their livelihoods. In addition, before Lourenço's "Operation Transparency" crackdown, large numbers of Congolese migrants escaping poverty and conflict worked in Angolan diamond mines. The perception that Congolese were "stealing" employment and augmenting illicit trade contributed to Angolan hostility toward the population and violence during the operation.

Under Lourenço's July 2018 "Diamond Marketing Policy," mining companies are entitled to sell up to 60 percent of production to buyers of choice. Diamonds from artisanal mining are to be acquired exclusively by Sodiam through small cooperatives, but sales are to be based on the market price. Lourenço is also looking to solicit better end markets for Angolan diamonds, as demonstrated by his June visit to Antwerp, Belgium. A global hub for diamonds, Antwerp generates premiums for direct diamond shipment to its markets. Currently, Angola exports just 1 percent of its rough diamonds directly to Antwerp, yet 50 percent end up in the city. Angola ships 70 percent of rough diamonds directly to the United Arab Emirates. Engaging Antwerp directly in trade could improve Angola's image to foreign mining investors. According to Nishit Parikh, president of the Antwerp World Diamond Centre, selling to Antwerp is an indicator of increased transparency and a commitment to change in Angola's diamond sector. As demonstrated by Operation Transparency, however, an overhaul of existing economic policies, especially when hastily or poorly executed, can have pernicious effects. Angola would do well to manage further implementation of reforms both to capture benefits and lessen costs to vulnerable populations.

Change in Angola

Despite the rocky start in September of Operation Transparency, the second step in diamond sector reform, the opportunities included in the July 2018 Diamond Marketing Policy are significant, especially when coupled with the wider economic and political reforms Lourenço is undertaking in Angola. The Angolan government, however, will need to address the impact of reform on vulnerable populations:

- **Anti-corruption—**Angola's diamond sector has historically suffered from elite capture of resource rents. Lourenço, however, has taken serious strides against corruption since taking office in September, removing cronies and family members of former president Jose Eduardo dos Santos from power and taking legal action against perpetrators of corruption. The richest woman in Africa and daughter of former president dos Santos, Isabel dos Santos was denied renewal of her diamond-exploration licenses in March and dismissed as chair of state oil company Sonangol in November. Filomeno dos Santos, the former president's son who ran the nation's sovereign wealth fund, was arrested in September for money laundering, embezzlement, and fraud.
- **Economic reform—**In its 2018 annual health check of the Angolan economy, the International Monetary Fund found that Angola has progressed in establishing a reform agenda focused on macroeconomic stability and growth. The reform agenda includes a macroeconomic stabilization program, structural reforms focused on stimulating the private sector, and a program of diversifying exports and substituting imports.
- **Vulnerable populations—**The reform framework of the new Diamond Marketing Policy is laudable. On the ground, however, Angola has faltered in responsibly managing operations that directly affect vulnerable populations, as demonstrated in the expulsions carried out in Operation Transparency. This experience suggests that Angola might wish to establish a better oversight mechanism for Operation Transparency, which is scheduled to last until 2020. The government might also improve training for security forces to manage the logistics of migrant repatriation and the relocation of rural populations whose livelihoods have depended on informal artisanal mining.

Conclusion

President João Lourenço has in one year initiated a number of reforms that signal the possibility of a new era for the country both politically and economically. When issued in July 2018, the Diamond Marketing Policy did not receive significant media attention. The attention paid to the Operation Transparency crisis since September, however, highlights the need for Angola to prepare for the ramifications of revised policies. Paying more attention to affected vulnerable populations may be central to capturing the full benefits from the diamond-sector reforms.

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DRC'S 2018 ELECTIONS: CAN VIOLENCE BE AVERTED?

By Dr. Dorina A. Bekoe

As the Democratic Republic of the Congo (DRC) approaches elections for president, parliament, provincial assemblies, and other offices on December 23, 2018, a recent survey reveals that a majority of Congolese do not believe that the government can organize credible polls and that they are willing to protest if the elections are deemed fraudulent. Given the violence with which Congolese security officials have dealt with protests in the past, hope for a peaceful outcome of the general elections may lie in the opposition's ability to unite and in the domestic election observers' capacity to thoroughly document the electoral process. *more...*

In this Thursday, July 19, 2018, file photo, Congo's President Joseph Kabila speaks during the state of the nation address to the National Assembly in Kinshasa, Democratic Republic of the Congo. A government spokesman on Wednesday, Aug, 8, said former interior minister Emmanuel Ramazani Shadary, the ruling party's permanent secretary, is the presidential candidate as Congo faces its first peaceful, democratic transfer of power in the country's history. (Source: AP Photo/John Bompengo, file.)

Dr. Dorina A. Bekoe is a Research Staff Member in the Africa Program at the Institute for Defense Analyses.

TERRORISM IN BURKINA FASO: THE NEW NORMAL?

By Austin Swift

The threat of a jihadist insurgency has been building in the West African nation of Burkina Faso over the last decade, but it has become especially acute since 2015. The ongoing conflicts in neighboring Mali and Niger have been factors, as has the absence of longtime strongman Blaise Compaoré. Once confined to the remote northern border with Mali, militant operations have been geographically expanding. Attacks on the capital, Ouagadougou, and expanding violence in the east highlight the intent and capacity of terrorists to extend their territorial reach. As the destabilization of Burkina Faso continues, security concerns are mounting. *more...*

A Burkinabé soldier inspects damage from the 2016 attacks in Ouagadougou. Associated Press Photo.

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Congolese Voices

A joint poll by the Congo Research Group (CRG) and Kinshasa-based *Bureau d'Etudes, de Recherches et de Consulting International* (BERCI) reveals that Congolese citizens have deep misgivings about the electoral commission and the judiciary, the key institutions charged with administering and managing the electoral process. A majority of respondents—64 percent—expressed a lack of confidence in the independent national electoral commission, known by its French acronym, CENI, and the courts. Seventy-four percent expressed a lack of confidence in the CENI's commissioner, Corneille Nangaa. In addition, not only does Emmanuel Ramazani Shadary, President Joseph Kabila's appointed successor, garner just 16 percent support, but 57 percent responded that if the opposition did not win, they would not consider the election a fair expression of citizens' choices. A majority, 56 percent, indicated that they were prepared to demonstrate against fraudulent elections. These findings suggest that the upcoming elections hold a high potential for violence. As experience in Kenya (2007), Côte d'Ivoire (2010), Nigeria (2011), and Togo (2005) shows, when the electoral commission cannot credibly organize an election and the judiciary is not considered a reliable arbiter of electoral offences, aggrieved parties will choose to turn to protests and, possibly, violence.

Protests have been rising in Congo. Data from the Armed Conflict Location & Event Data Project indicate that protests are the third most common type of conflict event in Congo in 2018, comprising 11 percent of conflict events. Furthermore, since September, the number of protests have been rising, surpassing all other forms of conflict incidents in October. Anti-government protests in Congo have not only become increasingly common, but also more dangerous. Since 2012, the youth-based group *Lutte pour le Changement* (Fight for Change, LUCHA) has protested against, among other things, the hardships of Congolese life, the absence of government services, and Kabila's suspected pursuit of a third term. Another youth-based group, *Filimbi*, which means "whistle" in Swahili, has also staged protests. Since 2015, intimidation and harassment of opposition political actors and supporters has increased sharply. According to Human Rights Watch, approximately 2,000 political opposition leaders and their supporters, as well as pro-democracy activists, have been arbitrarily arrested, and nearly 300 people have been killed at political protests. In combination with the survey findings, the propensity of opposition supporters to continue to demonstrate, even in the face of certain violence at the hands of the security forces, should be viewed as a warning of future conflict.

The Opposition's Chances

According to the poll conducted by CRG/BERCI, the opposition collectively has the largest amount of support. For this reason, many argue that the road to victory lies in nominating a single candidate to represent the opposition. At a recent meeting in Geneva, opposition leaders attempted to do just that, selecting Martin Fayulu of the Engagement for

Citizenship and Development Party. But in the CRG/BERCI poll, Fayulu is preferred by just 8 percent of respondents; only 13 percent felt that he should be the unity candidate. Less than a day after its signing, Felix Tshisekedi, representing the Union for Democracy and Social Progress, and Vital Kamerhe, representing the Union for the Congolese Nation, withdrew their backing, citing the lack of grassroots support for Fayulu. In fact, Tshisekedi and Kamerhe have the strongest leads within the opposition in the CRG/BERCI poll with 36 and 17 percent, respectively, and their supporters had protested—at times violently—upon hearing of Fayulu's selection. Respondents also selected them as the top-two preferred choices for a unity candidate, with 44 percent supporting Tshisekedi and 22 percent supporting Kamerhe.

The quick dissolution of the Geneva agreement may foreshadow the course of the election campaign. The advantage Shadary holds through access to state resources is already evident. He has started touring the country and holding events in advance of the official start of the electoral campaign in late November. The Common Front for Congo, created to support Shadary, recently unveiled a 500-strong organization composed of high-ranking members of the government charged with specific responsibilities such as communication, artist recruitment, sports, and other tasks. Since the controversial removal of the two-round system in 2011, a candidate needs only to obtain the most votes to win; a majority is not required. Thus, even with its lead in the polls, a fractured opposition could still hand the victory to the ruling party. Alternatively, should an opposition candidate win, the violent reaction to Fayulu's selection casts doubt on whether such a result would be universally accepted.

Limitations of the International Community

The international community has limited room to maneuver. As with the 2011 elections, Kabila has rejected international financial and logistical assistance for the 2018 elections, which are estimated to cost more than $1 billion. Potential international observers, such as the European Union, have not received permission to observe Congo's election, and it is not clear what role Southern African Development Community or the African Union will play in observing the vote. Addressing the United Nations General Assembly in September, Kabila justified the decision to keep the international community at bay by saying that Congo had to prioritize its sovereignty. He charged outside governments with nefarious, ulterior motives. Kabila's distaste for international intervention is not new; he has been requesting the end of the UN peace operation in Congo since 2010.

Keeping the international community out also deprives Congo of an important witness to the election, which places greater pressure on domestic election-observation efforts. Currently, the Episcopal Conference of the DRC plans to deploy approximately 1,000 long-term observers and 40,000 short-term observers to the more than 90,000 polling places in the country. Emerging practices from other African countries suggest that domestic-observation missions are most effective in preventing violence when their mandate includes more than just observation; domestic groups also need to develop contingency plans to address tensions and conflict arising from the election. In other African countries, civil society organizations have set up election situation rooms to monitor the polling in real time and to react to potential violence quickly. To date, no such plans have been announced for the DRC.

Conclusion

The DRC's electoral process, particularly the race for the presidency, will be contentious. The ruling party faces an uphill battle to secure its candidate's election, while the fractured opposition—supported by most Congolese—struggles to compete. Meanwhile, many distrust the key institutions charged with managing the electoral process and reducing contention. With Congolese indicating their willingness to continue to protest if the ruling party wins, post-election violence is a distinct possibility.

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TERRORISM IN BURKINA FASO: THE NEW NORMAL?

By Austin Swift

The threat of a jihadist insurgency has been building in the West African nation of Burkina Faso over the last decade, but it has become especially acute since 2015. The ongoing conflicts in neighboring Mali and Niger have been factors, as has the absence of longtime strongman Blaise Compaoré. Once confined to the remote northern border with Mali, militant operations have been geographically expanding. Attacks on the capital, Ouagadougou, and expanding violence in the east highlight the intent and capacity of terrorists to extend their territorial reach. As the destabilization of Burkina Faso continues, security concerns are mounting.

A Burkinabé soldier inspects damage from the 2016 attacks in Ouagadougou. Associated Press Photo.

A Strongman Departs, But the Extremist Threat Rises

Burkina Faso is a relatively poor, landlocked nation located in the heart of West Africa. A former French colony, the country gained independence in 1960 and suffered a series of coups from 1966 until the rise of Thomas Sankara in 1983. Sankara envisaged a hegemonic socialist state and pan-Africanist utopia, rejecting colonial legacies, cronyism, and corruption. In 1987, Blaise Compaoré, a former Sankara commandant, seized power in a violent coup d'état, killing Sankara in the process. Acting as a regional strongman, he established partnerships with world powers and cultivated other African leaders, including Liberian President Charles Taylor and Libyan leader Muammar Gadhafi.

In 2012, as the conflict in Mali escalated, Compaoré acted as a mediator between government forces in Bamako and Ansar Dine, an Islamic paramilitary group allied with Tuareg rebels and al-Qaeda in the Islamic Maghreb (AQIM). During negotiations, he hosted discussions directly with the militants. This brokering role may have helped to shield Burkina Faso from Islamist insurgent activity for a time. In October 2014, after 27 years in power, Compaoré attempted to amend the constitution to stand for a fifth consecutive term. Miscalculating the intensity of the political response, Compaoré ultimately capitulated as the military dissolved the government and promised democratic elections. In November 2015, Roch Marc Christian Kabore was elected President of Burkina Faso. Compaoré's ouster, however, provided an opportunity on which extremist groups have capitalized. The current administration faces a challenging atmosphere of rampant poverty, disenfranchised regions, and an escalating war on terror.

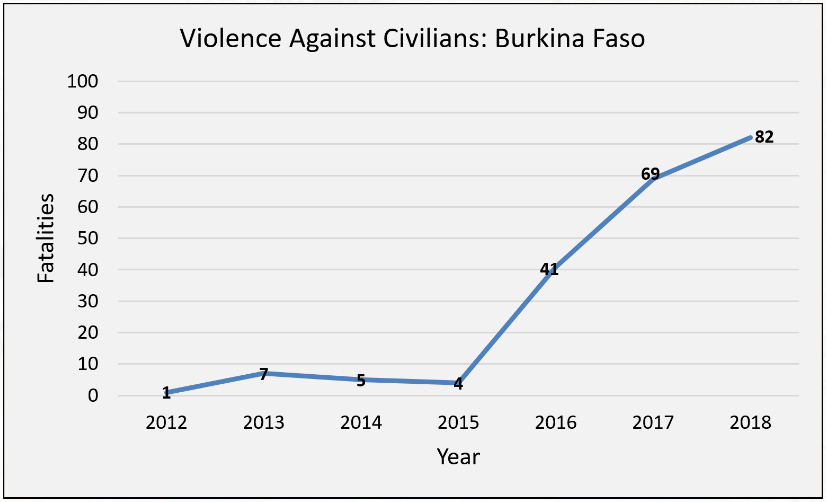
Jihadists Take Aim at Ouagadougou

Violent extremism in the greater Sahel is a complicated web of colluding and competing actors stretching from Algiers to Abidjan. The lines between Islamist extremist groups and ethnic/rebel militias who aren't necessarily extremists have increasingly blurred. The ongoing crisis in Mali has contributed to the spread of regional terror and fueled cross-border assaults in the far north of Burkina Faso. Since 2015, there has been a surge of attacks on soft and hard targets by an array of regionally active terrorist organizations. This intensification largely points to AQIM and its affiliates: Al Mourabitoun, Jama'at Nusrat al-Islam wal Muslimin (JNIM), Ansar Dine, and Ansaroul Islam. In 2015, the Movement for Unity and Jihad in West Africa (MUJAO) rebranded itself as Islamic State in the Greater Sahara (ISGS) and since then has been credited with attacks on international forces in Mali, Niger, and Burkina Faso. Once confined to the far northeast of the country, terror attacks in Burkina Faso have accelerated in frequency and sophistication. Kidnappings, village incursions, and assaults on the military utilizing improvised explosive devices have become widespread. Most alarmingly, the extremist threat has reached more populated and once peaceful places such as eastern Burkina Faso. The capital, Ouagadougou, has been targeted three times in the last three years:

- On January 15, 2016, gunmen attacked the Splendid Hotel and Cappuccino restaurant in downtown Ouagadougou, killing 30 people. The restaurant and hotel were popular with foreigners and often served French forces participating in Operation Barkhane. Responsibility was claimed by AQIM and Mali-based Al-Mourabitoun.
- On August 13, 2017, gunmen returned to downtown, killing 18 people and injuring 25 more when they opened fire on the Aziz Turkish restaurant. Responsibility was claimed by JNIM.
- On March 2, 2018, eight gunmen launched a coordinated dual attack on the French embassy and Burkinabé Army Headquarters, killing eight people and injuring more than 80. JNIM claimed responsibility.

A New Frontline

As Burkina Faso, along with fellow G5 Sahel forces and anti-terrorist militias, mobilizes to push back against growing extremism in the capital and eastern border, terror groups are seeking to expand their operational territories. On September 23, unidentified gunmen kidnapped three mining workers near Djibo, in northern Burkina Faso. Two weeks later, a Burkinabé gendarme died in an attack on the Inata gold mine. Once separated by years, events such as these have become commonplace in northern and eastern Burkina Faso. Due to the lack of capacity by the central government, the geographic nexus between Niger, Benin, and Togo has become a lawless zone of smugglers, illegal gold miners, and banditry. The topography of this remote forest region has enabled terrorists to quickly strike targets and evade detection by G5 forces fighting against Sahelian extremist groups. Evoking the spirit of Thomas Sankara, who called for the formation of self-defense cadres, the populace of eastern Burkina Faso is fighting back against the spread of jihadism by forming militias called "Koglweogo," which function to provide security in areas neglected by national security forces.



This dataset depicts the uptick in violence from November 2012 to November 2018. Data from the Armed Conflict Location & Event Data Project (ACLED). Graph by Author.

An Uncertain Future

The recent attacks in Ouagadougou and the intensifying threat in eastern Burkina Faso reinforce a growing concern that AQIM and its affiliates may be seeking to go beyond their former operational strongholds in the Sahara. Their territorial expansion southward may be a response to the birth of Islamic State in the Greater Sahara, with which they are vying for control of the Sahel. Burkina Faso, known as the "Land of the Upright People," continues to benefit from a long history of intercommunal and ethnic cooperation, but as terrorism continues to spread, how long can the country remain relatively stable?

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CENTRAL MALI: CAN INSTABILITY BE CONTAINED?

By Dr. Ashley Neese Bybee

Mali has been the epicenter of instability in the Sahel since a military coup in 2012 was followed by a protracted separatist insurgency in the North. In 2015, the central region of Mopti emerged as a new hot spot, where jihadists stoked ethnic tensions to create significant intercommunal violence. Despite political and security initiatives launched by the Malian government and its foreign partners, unprecedented levels of violence have been reported in 2018 in this region. Central Mali has now earned the unenviable title as Mali's "deadliest region." How did it get there? *more...*

Dr. Ashley Neese Bybee is a Research Staff Member in the Africa Program at the Institute for Defense Analyses.

Map of Mali, showing Mopti, where ethnic tensions have resulted in significant violence. (Source: "Mali," CIA Factbook, November 19, 2019, https://www.cia.gov/library/publications/the-world-factbook/geos/ml.html.)

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Map of Mali, showing Mopti, where ethnic tensions have resulted in significant violence. (Source: "Mali," *CIA Factbook*, November 19, 2019, https://www.cia.gov/library/publications/the-world-factbook/geos/ml.html.)

Background

Major instability in central Mali broke out in 2015 after the French Operation Barkhane successfully reclaimed territory in the North seized by Tuareg separatists who had joined forces with Islamist insurgents. With French forces in control of the Northern territory, insurgents moved south into the more densely populated central Mopti region. Here, the insurgency took on an ethnic tone. One of the most influential insurgent leaders was Amadou Koufa, who led the Jama'at Nasr al-Islam wal Muslimin (JNIM). Koufa began recruiting heavily from the Fulani and Peul ethnic groups, herders who were attracted to him less for his expression of Islamist grievances and more for his hard stance against corruption, poor land management, and abuses against the local population by the Malian army. By targeting herder communities for recruitment, Koufa exacerbated existing tensions with Dogon and Bambara ethnic groups—largely composed of hunters who compete for access to common resources like land and water with the Fulani and Peul. Koufa and the JNIM imposed Sharia law in these central regions, closing traditional schools, forcing women to cover their heads, and banning music, marriages, and other religious celebrations.

Since 2015, more than 1,200 people have been killed in Central Mali. Most of them were members of the Fulani and Peul ethnic groups, who are targeted by local militia groups for their association with jihadist groups such as JNIM. Unfortunately, abuses by the Malian army have also contributed to the violence. As part of the counterterrorist Operation Dambé, some Malian units reportedly arrested, executed, and buried the bodies of suspected terrorists without due process, raising concerns that those killed had in fact simply been civilians loosely associated with the jihadists. Following such operations, jihadists have retaliated against innocent local civilians, whom they suspected of collaborating with government forces.

In recent months, the violence has reached unprecedented levels. Figures differ, but the Norwegian Refugee Council reports that 120,000 Malians have been displaced as a result of the unrest this year, with 70,000 displaced over the last two months alone. Of the latter, more than 34,000 lack access to humanitarian assistance despite having their needs recorded by aid agencies. In other words, the violence has produced a humanitarian disaster.

Shortcomings and Setbacks

There have been a number of attempts at political agreements and security initiatives, but none have succeeded in bringing peace to central Mali or in addressing the underlying causes of instability.

The 2015 Agreement on Peace and Reconciliation in Mali, between the Malian government and armed groups in the North, was designed to deliver more political autonomy and economic development to the inhabitants of that region in exchange for the insurgents' demobilization and advancement toward genuine reconciliation. While some modest gains may have been achieved in the North, the agreement did not include provisions for peace in central Mali, since that region did not present a significant threat at that time.

Similarly, the United Nations Multidimensional Integrated Stabilization Mission in Mali (MINUSMA) was established to stabilize the country after the Tuareg rebellion. It was designed to operate primarily in the North by supporting political processes and conducting security-related stabilization tasks. Although its mandate was recently expanded to include Mopti, it did not receive any additional resources. The lack of resources will likely hinder MINUSMA's progress in central Mali. For its part, the Malian government has implemented an "Integrated Security Plan for the Central Regions," but its impact so far has been in some cases to trigger even greater violence by jihadists in retaliation for perceived military abuses.

In February 2017, the Permanent Secretariat of the G5 Sahel regional body announced the creation of a multinational joint counterterrorism force, called the *Force Conjoint du G5 Sahel* (FC-G5S). This force was designed to counter instability across the Sahel, with an immediate focus on Mali. To date, approximately 4,000 troops have been deployed in six operations. In June 2018, however, the FC-G5S's operational headquarters in Sevare, Mali, was attacked by gunmen who destroyed the base's communications capabilities. As a result, operations halted, and staff are currently awaiting a transfer to a new location. Operations are not expected to resume until December.

The FC-G5S has experienced institutional setbacks as well, namely shortages in funding required to make the force fully operational. Western donors have pledged $416 million, yet only about half ($206 million) has been received. The United Nations Security Council has recognized the need to speed up efforts to make the FC-G5S fully operational, urging donors to honor their financial commitments.

Conclusion

Central Mali is a unique environment that deserves a security strategy of its own. Success will require a carefully tailored strategy that combines political, economic, and security measures. Perhaps the greatest challenge for Mali and its partners will be to effectively implement such a strategy in central Mali while continuing the campaign to deliver sustainable peace in the country's North.

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