



Mapping Sub-Saharan Africa's Future

Conference Summary

The National Intelligence Council recently convened a group of top US experts on Sub-Saharan Africa to discuss likely trends in the region over the next 15 years. The group discussed several major issues or drivers that will affect Africa, including globalization and its impact on political development and economic growth, patterns of conflict, terrorism, democratization, AIDS, evolving foreign influences, and religion.

Perhaps the most important message delivered by the conferees was that even in this age of globalization, local factors will determine Africa's fate. Geography, decisions by governments past and present, the presence of trained professionals, the strength of civil society groups promoting democracy, and the capabilities of the local police and security forces all have the potential decisively to affect the performance of individual African countries in the next 15 years.

Conference participants agreed that most of Africa will become increasingly marginalized as many states struggle to overcome sub-par economic performance, weak state structures, and poor governance. Globalization will accelerate increasing differentiation among and within African countries. Reform efforts will continue to be complicated by structural obstacles, "neighborhood effects," such as the cross-border spillover of conflict, and African skepticism about globalization and a fate increasingly tied to international markets.

- South Africa, Africa's oil producing states, and a handful of other African countries committed to governance reforms have the best chance of attracting international investment needed to compete and survive.
- Other African countries—including some failed states—plagued by poor leadership, divisive ethnic politics, decayed government institutions, geographic constraints, and a brain drain may be unable to engage the international economy sufficiently to reverse their downward trajectory.

Participants saw the level of violence in Africa as unlikely to change appreciably in the next 15 years. Most conflicts will be internal. Many African security forces will undergo further atrophy due to low economic growth, shrinking foreign military aid, and the impact of AIDS.

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This paper summarizes a one-day conference of US experts on Africa convened in January 2005 and sponsored by the National Intelligence Council to discuss likely trends in Sub-Saharan Africa over the next 15 years. It was prepared under the auspices of the National Intelligence Officer for Africa.

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Among the other key conference conclusions:

Africa is unlikely to become a major supplier of international terrorists due to the profound differences between Islam practiced in Africa and in the Middle East. Foreign terrorists, however, may seek sanctuary in Africa or attempt to hide weapons and assets there. The overwhelming majority of terrorist activity in Africa will involve or be caused by indigenous groups waging war against local governments and populations.

- **The group believed that the most important terrorist-related trend in Africa affecting the United States is the further development of pockets of radical Islam that actively provide support and sanctuary to international terrorists.**

Most African countries will continue to proclaim a public adherence to democracy and no other form of government will significantly challenge the nominal allegiance to regular elections; **however, commitment to democracy in Africa will remain a ‘mile wide and inch thick.’** Even so, relatively few of the old-style authoritarian states will not hold elections at all.

- Those countries that are consolidating democracy will make significant gains: multiparty elections will become institutionalized and the operations of their parliaments, courts, and other institutions will improve. By 2020, for this set of African countries, any turnback from democracy will be almost inconceivable.

Regarding AIDS, even with relatively optimistic assumptions about a vaccine and the roll-out of anti-retrovirals (ARVs), it is clear that there will be very large increases in the number of people who will die in the next ten years given weak medical care distribution systems. At the same time, **the experts judged that it is not clear if AIDS can be directly tied to state collapse in the way that was feared and anticipated a few years ago.**

Some traditional foreign powers, including France and the United Kingdom, probably will continue to disengage gradually from Africa while newer actors, especially China, are likely to play larger roles. China already has a significant impact on Africa—raising some commodity prices—as Beijing searches for secure sources of raw materials. Tensions may be exacerbated, however, by cheap Chinese goods flooding African markets, with a consequent effect on weak domestic manufacturing bases, and by the presence of larger numbers of Chinese workers in Africa. Over the next 15 years, there is probably a greater possibility of India developing a distinct foreign policy with political interests toward Africa.

Included among the possible “upside surprises” the group identified were: the potential for **improvements in hydrocarbon management**; scientific **advances in agriculture** such as those that helped Asia in the 1960s and 70s; **technological developments that fight AIDS**, malaria, and other infectious diseases and push upward the political and economic trajectory of some countries; **development of regional and internal peacekeeping doctrine and capabilities** to allow for more timely interventions and more decisive resolutions to conflicts; and **positive developments in the debt management** that boosts private and public investment levels.

Downside scenarios included: **Nigeria as a failed state**, dragging down a large part of the West African region; some type of ecological downturn; and conflict over water.

Discussion

*This paper summarizes a one-day conference of US experts on Africa convened in January 2005 and sponsored by the National Intelligence Council to discuss likely trends in Sub-Saharan Africa over the next 15 years. Participants were asked to consider the recently-released National Intelligence Council report **Mapping the Global Future**, although the conference was not designed to be a point-by-point response to the NIC project which projects global trends and possible scenarios out to 2020. As with the 2020 study, our focus was not to describe every trend that will affect Africa but to highlight those issues that will drive important developments and that therefore must be considered by policymakers.*

Marginalization, Differentiation

Over the next 15 years, Sub-Saharan Africa will become less important to the international economy. The high growth rate projected for the global economy in the NIC 2020 study will not be matched by African countries, which will fall far below the rates projected for the fast-growing East Asian nations. Hydrocarbon exports will certainly boom but they are limited and distinctly focused within enclave economies in a few states. Indeed there is evidence to suggest that hydrocarbons have retarded African development, promoting patronage and misrule by African leaders rather than national development. Africa's overall marginality affects individual country performance because "neighborhood effects" matter. Investment is flooding into Vietnam today—not only because of Hanoi's economic policies but because investors are bullish about Asia in general. More generally, the type of problems that African leaders will confront—marginal economic performance, weak state structures, poor governance—will be increasingly different from the issues that even other developing world leaders will confront.

Increasing Differentiation

In the context of increasing overall marginality, the most profound trend in Africa will be the increasing differentiation among African countries across any measurable line of performance. For instance, a few African countries (such as Botswana and Mauritius) have already achieved high growth while a number of other countries (Nigeria) are in significant ways poorer than they were at independence. Some countries have established relatively well-functioning democracies (such as Ghana, Benin, South Africa), while increased lawlessness and anarchy can be found in large parts of West and Central Africa. Finally, a few states have consolidated a sense of national identity while others have been fractured by civil war. Of course, a large number of states remain in the middle of each indicator with performances that tend to be ambiguous. Generally, in Africa, "all bad things go together," as those countries that have suffered instability also have seen their growth rates plummet and their populations subject to horrific abuses. The ties that bind all the good things together are less clear: Ghana has been both a good economic performer and has developed a laudable democratic system; Uganda has been an above-average economic performer but has retained an authoritarian political system; while South Africa solved one of the most divisive domestic conflicts of the twentieth century and developed an extraordinarily liberal political system, but has yet to see economic growth above the continental mean.

Globalization will in all likelihood accelerate the differentiation among African countries. Those countries doing well will be able to access an international economy that is extremely buoyant and will be readily accepting of their goods. Technology flows from the international economy to those well-performing African countries with relatively high governance standards will allow some countries to leapfrog over some development challenges. At the same time, those countries doing poorly will be increasingly subject to the other side of globalization: illegal drug trades, arms traffickers, and a large global gray market that allows governments that seek to stripmine their own countries to sell all kinds of goods (e.g., timber, diamonds) to willing buyers outside of international supervision. It will be ever easier for capital to flee areas of poor performance. Globalization therefore can promote both virtuous cycles of growth and whirlpools of decline. Indeed, the number of countries in the middle on growth and governance performance may decline as the forces of globalization continually reward success or aggravate failure.

A Stable Hierarchy

In addition, the hierarchy of nations in Africa in terms of their economic, political, and state performance will be unlikely to change markedly in the next 15 years. Certainly, some countries will have significant reversals of fortune (for better or worse) due to leadership changes, exogenous economic shocks, or developments in their regions that cannot be predicted in advance. However, it would be surprising if, in general, the set of countries that are the current leading performers in categories were substantially different from those in 15 years. Similarly, those countries that are lagging substantially below the continental average will, more than likely, continue to be at the bottom of the league in 15 years.

Part of the reason for this inertia is that while the world can change rapidly in a decade and a half, countries take much longer to substantially change directions. African countries also are substantially affected by structural factors that profoundly influence their economic and political performance. Coastal countries tend to have tremendous advantages, especially compared to the landlocked countries of the Sahel and Central Africa. Indeed, there is a class of African countries—which includes Burkina Faso, Central African Republic, Chad, Mali, Mauritania, and Niger)—that are so burdened by their extreme climate, related problems of health and disease, and poor geographic position that it is not clear that any economic model offers them a path toward development. Civil society groups that pressure for democracy are also not found uniformly across the continent, but tend to be disproportionately located in coastal states where there were better universities and where they have contacts with international society. The civil society groups that are relatively powerful have already succeeded in their own countries, while any new pro-democracy civil society adherents will emerge only slowly.

Paradoxically, other countries may be burdened by their seemingly munificent resource endowment. It is unlikely that the major oil producers (Angola, Equatorial Guinea, Nigeria, Sao Tome, Sudan) would have a future significantly different than the ruinous record of petroleum producers to date.

The nature of reform past and future also affects the possibility for changes in the African hierarchy. The most dramatic political developments in the last 15 years in Africa have been the collapse of the neo-patrimonial state and the advent of multiparty elections (albeit of enormously varying quality) almost everywhere on the continent. On the economic front, most African

countries also eliminated the most egregious economic imbalances, notably the black market in foreign currency. What is left are the much harder, less dramatic, but perhaps more substantive reforms that will inevitably take a great deal of time and will only yield progress slowly. For instance, African countries must follow-up the dramatic roll-out of multiparty elections with difficult reforms to strengthen legislatures, the judiciary, and the developing national cultures of rights. Indeed, strengthening democratic institutions is particularly important in Africa because there will inevitably be ethnic and other groups that have mobilized, but have lost in elections and must be reassured that their interests and rights will be protected even if they are not in power. On the economic front, countries face a complex governance agenda where progress is necessary but inevitably slow and difficult to manage. Similarly, apartheid need not be overcome again; rather, South Africa now faces the more mundane, but exceptionally difficult, task of increasing its rate of economic growth while redistributing wealth. The focus of South Africa's approach—growth or redistribution—may well decide its economic fate. It will be hard for countries to significantly change their place in the African performance hierarchy while they are implementing these difficult but necessary reforms.

There are also important “neighborhood effects” that some African countries may not be able to overcome. As is clear from West Africa, conflict in one country can spill over and infect an entire region. Similarly, if one of the large countries that tend to dominate Africa's regions (e.g., Democratic Republic of the Congo, Ethiopia, Nigeria) go badly wrong—or continue to do so, as in Congo's case—the small states surrounding them may have limited degrees of freedom in which to operate. Thus, the efforts of even extremely well-intentioned governments towards governance and democratic government may not transfer into dramatic relative changes in performance because they are stuck in a “bad neighborhood.” On the other hand, Zimbabwe proves definitively that governments determined to decline can ignore the positive developments around them.

Finally, emerging from economic decline—the condition of many African countries since the mid-1980s—is extremely difficult. Ghana began dramatic reforms in the early 1980s but it took almost 15 years for it to return to the level it was in the early 1960s. Roads, universities, agricultural extension systems, judiciaries, and many other institutions are extremely hard to reconstitute once they have decayed to the parlous state found in many African countries. Most importantly, the brain drain from which Africa continues to suffer means that even good leaders with considerable political skills will have difficulty turning their countries around because they essentially have to wait to create entire new cohorts of trained professionals to tackle problem areas.

African countries therefore will react to and benefit from different global and regional trends in many different ways; but they will face substantial structural obstacles to changing substantially their individual political and economic glide paths in what is, by historical standards, a very short period of time. This is not to argue that African countries are destined for a particular fate (although the Sahelian countries face monumental obstacles when trying to overcome their geography); rather it is to note that in Africa, more so than in perhaps any other region, the choices leaders make are mediated by a series of structural obstacles that can be enormously frustrating. It is therefore important not to set the bar too high, or to conflate the long-term nature of the crisis with cynicism about prospects for change.

Globalization

Perhaps the biggest difference between the NIC's 2020 report and its predecessor that examined prospects out to 2015 is that globalization is now viewed as a "megatrend:" "a force so ubiquitous that it will substantially shape all the other major trends in the world of 2020." This conclusion appears to have been driven in large part by the estimate that the international economy will be roughly 80 percent larger in 15 years, most notably driven by exceptionally high growth rates in the populous countries of Asia. Africa has been the continent least positively affected by globalization to date and the challenge to take advantage of the positive trends in the global economy will be substantial.

This is not to say that the positive effects of globalization will have no effect on Africa. Cell phones have already caused a communications revolution in Africa and the Internet is spreading at an extraordinary rate, albeit beginning from a very low base. The now significant diaspora communities that many African countries have in western nations will continue to increase the amount of money sent back to Africa. Remittances in many cases will be among the most important "export" earners for African countries, reflecting both the magnitude of these flows but also the failure to develop non-traditional exports. Whether remittances from abroad in the future will go to investment, as opposed to the current pattern of enhancing consumption and housing, is unclear and will depend on the governance trajectories of the countries, the extent of the ties that bind these diaspora communities over generations, as well as local perceptions of the long-term investment climate.

African countries will, of course, also be exposed to the downside of globalization. The ferocious competition that the international economy will foster in the next 15 years will be a profound challenge to any attempt at African industrialization. Indeed, the bar continues to be raised on what is necessary for a government to do in order to foster a competitive international economy. Governance practices that might have been acceptable in the 1960s when there was relatively little competition will not be acceptable in the next 15 years. Even Ghana, an improved economic performer, has not been able to increase its growth rate above four percent because of long-standing governance problems, including unclear land tenure that has led to unending disputes about property rights in the rural areas and a judiciary whose ability to enforce contracts is questionable.

Corruption will pose a particular challenge to African countries. Some countries will notably benefit from the increasing official international allergy to corruption. However, those countries that do not have particular good governance practices will face ever-more temptations from the international economy that will increasingly include buyers not influenced by national or international codes of conduct. China, in particular, has not shown much concern with promoting governance as it expands its economic reach.

Finally, it is also not clear whether the traditional cycle of industrial migration that caused textile and electronic firms to move from Japan, to East Asia, to Southeast Asia in search of cheap workers—as their own work forces became richer—will hold given that China and India seem to have essentially an infinite number of low-skill workers. The international economy had

considerable space for countries to begin export drives in the past, but China and India may now clog markets for many years to come.

Typology of Globalization: Winners and Losers

Different types of countries will benefit from globalization in different ways. The benefits of globalization can fall selectively across geographic areas. Cities may benefit because they are agglomerations of highly-trained professionals but rural areas may be hurt. Similarly, one country in an area may benefit from being able to access the international economy but this does not mean the region will benefit. The development of high-speed Internet lines to Accra will not necessarily have any effect on surfers in Lomé.

South Africa is perhaps unique: It has a substantial technical base, an indigenous business class, and, probably uniquely amongst African countries, an ability to attract large amounts of talented individuals from the surrounding region. South African companies are sitting on massive amounts of capital that, if invested locally, would significantly boost growth. South Africa still has to adopt a myriad of policies to take advantage of the international economy but it has far more potential than almost any other country on the continent to take advantage of the positive trends in the international economy. In particular, the social basis for growth largely exists in South Africa. It is the government that, to date, has yet to commit itself to achieving a high growth rate and to implementing the necessary redistribution measures within a context of heightened participation in the international economy.

A second group of countries that will react to globalization in roughly similar ways includes the **oil producers**. Global demand for hydrocarbons will be extremely robust in the next 15 years and these countries will face the nominally happy chore of disposing of large amounts of export revenue. However, to date, oil-producers have had very poor development records and much of the oil revenue that African producers receive has been wasted. In most petroleum producing countries, the path to wealth for elites is found in greater access to state-controlled oil revenue rather than through private sector investment. It is unlikely that the ability of oil producers to leverage their revenue streams will improve markedly in the next 15 years. Indeed, the increasing presence of China (which already acquires 25 percent of its oil from Africa) may actually put a brake on international efforts to promote governance amongst oil producers because Beijing is so skeptical of any action that interferes with what it views as sovereign domestic prerogatives.

A third group of countries are those that will make enough deliberate reforms in governance to attract international investment, retain trained manpower, and take advantage of new technological developments. These “**better governance**” countries are likely to be coastal, speak English, and already have a relatively high growth record, although Kenya may be exceptional in this regard. The current round of globalization is based on constantly improving information technology and therefore requires relatively large cadres of trained professionals and, of course, disproportionately benefits this class of people. Ghana demonstrates that Africa can be a destination for outsourcing and such service jobs will become even more important in the next few years. How many countries actually join the “high-governance-achieving club” will depend in good part on the social basis for growth in each country. Leaders will have to define or create a constituency that demands and values high growth and is able to make the necessary

adjustments in government policy in order to participate in the international economy. It will be much easier for leaders in coastal countries who have already begun reforms to nurture and increase this constituency through economic progress tied to globalization.

Finally, **poor governance countries** or **failed states** (those where basic government institutions have decayed to the point where they cannot make governance decisions) may not be able to engage the international economy positively because of their poor decisions or because their geography is so constraining that leadership decisions cannot deflect a downward trajectory. As a result, negative trends in these countries are likely to be aggravated by globalization. In particular, highly trained professionals from these countries will find it ever easier to migrate.

Differentiation Within Countries

A final aspect of globalization will be to increase differentiation *within* many African countries. Globalization will benefit especially urban areas that can be connected in real time to the vast information flows that the international economy will generate and where the educated elite in each African country will inevitably locate to the urban areas. The rural-urban divide is therefore likely to be further aggravated in many countries. In some ways, Africa may return to an almost colonial model of development where the state and significant economic activity was found in the capital but only sporadically elsewhere (“*afrique utile*” versus “*afrique inutile*”). Countries that perform well will be able to push against these trends, but the average African country may see its rural areas become every more marginalized.

An African Vocabulary for Development?

An important variable over the next 15 years will be if African countries can finally formulate their own “globalization vocabulary,” which will allow them to successfully tap the opportunities posed by globalization. Many African leaders have been slow to embrace globalization, even as they adopt many of the reforms demanded by the international financial institutions, because they do not know where their economies are heading. Indeed, many African elites, even in the relatively well-performing countries, have yet to embrace the upside of globalization in ways commonly found in East Asia. Few, if any, African leaders tell their fellow citizens that they must “export or die.” Many African leaders believe that the international economy is still rigged so that Africans will never prosper. Some accurately perceive a loss of domestic political control if sources of wealth are hitched to external forces beyond their control.

If African leaders can develop their own vocabularies to explain economic development to their citizens, the likelihood of a political consensus developing in favor of growth will be much higher. If such indigenous perspectives are not adopted, the chances for high growth in most African countries will be extremely limited. There is a profound need to ground globalization in local realities.

It is clear that part of the emerging, still inchoate, African perspective on globalization differs considerably from conventional orthodoxies. The West, and the United States in particular, places considerable stress on the market forces inherent in globalization, believing (or fearing) that powerful international markets have compelling political implications. Africans hope that globalization emerges as a set of international institutions that will promote governance, especially in the form of the New Partnership for Africa’s Development (NEPAD), that will to

some extent insulate them from the cold wind of the market. Although it is largely ignored in the United States, NEPAD consumes a significant portion of current African discussions on development and, critically, is a substantial part of South Africa's and Nigeria's foreign policies. It is hardly exceptional for the weak to put their faith in international institutions that they will influence by fiat, or—as in the case of NEPAD—create outright, rather than in markets that will be dominated by the strong. There are obviously many obstacles before the peer review mechanism in NEPAD (the critical part) succeeds; however, Africans are likely to continue to focus on developing this continental architecture long after the West has given up on it as another failed program.

The African State

Most territorially defined African states will continue to exist formally in 2020. While there may be boundary changes in Sudan, Somalia, and a few other places, the legal map of Africa will not change significantly. However, the informal map of power will become more confused. Some African governments will continue to consolidate administrative capabilities and military might and will therefore have substantially more ability to influence their own citizens and neighbors in the next 15 years. Other countries will continue to lose capabilities, largely because of persistent revenue crisis and the ability of non-state actors including NGOs, traditional leaders, insurgents, criminals, and terrorists, to operate in areas where the formal presence of government is limited. These “archipelago states” may constitute the plurality of all countries in Africa as it will be relatively common for the capital informally to cede control over parts of their hinterland, especially since globalization constantly pushes economic activity to the capital, or the few major urban, agglomerations. A certain number of African states will also essentially be taken over by the international community. While it is doubtful that any African states will become long-term trustees of the United Nations, international supervision of some failed or failing states will become more common and accepted.

Those African countries that fail are unlikely to receive significant assistance from international peacekeepers. South Africa and other African militaries have only limited peacekeeping capabilities. While international commitment to peacekeeping is likely to increase, it probably will not keep up with African demand. When foreigners intervene, they are usually best at reconstituting order in the cities. The rural areas in countries that have been “peacekept” tend to remain ungoverned for years. The international community has also found it easier to intervene in small countries, for obvious reasons. Large countries that spiral downward are therefore likely to have especially complicated maps of power where vast areas may be formally ungoverned.

A few aspects of state territoriality will “harden” in the next 15 years. It is likely, for instance, that refugees will find an increasingly hostile reception amongst nominal host governments. Many African governments have learned that conflicts in neighboring countries can drag on for many years and that a commitment to house refugees can be a very long-term commitment. Refugees have also been a cause of destabilization in many areas.

Patterns of Conflict

Africa was the site of much of the military conflict in the world in the 1990s and there is no reason to believe that its share of world violence will change appreciably in the next 15 years.

As in the past, most African conflicts will be internal, although the pattern of outsiders intervening in civil wars, either to help one of the protagonists or to protect themselves from the fallout of the conflict, will continue. African governments and rebels will continue to take advantage of the international market for basic weapons and, increasingly, logistics and higher-order military functions such as aerial reconnaissance.

Most African countries will not be able significantly to increase the prowess of their security forces, in good part because of continued low economic growth and the paucity of foreign military assistance. The impact of HIV-AIDS on militaries may also constitute a destabilizing force. Indeed it is likely that formal militaries in many countries will undergo further significant atrophy, occasionally to be replaced outright by informal militias that are recruited opportunistically by leaders when there is a threat. Such armed civilians will inevitably destabilize their own countries and be an enormous threat to their fellow citizens. However, a few African countries that already have capable military forces (e.g., Angola) will be able to continue to increase the prowess and, perhaps, the size of their armed forces, encouraged, in part, by the departure from Africa of some traditional powers.

Terrorism

Given that significant portions of Africa—those areas outside the nations' capitals—will essentially be ungoverned, there will be many opportunities for terrorist groups that threaten the West to seek haven across the continent. However, it is unlikely that Africa will become much of a supplier of international terrorists because of the profound differences between the Islam practiced in Africa and that in the Middle East. Nor will terrorist groups find supportive governments in Africa akin to the Taliban regime in Afghanistan. However, those terrorist groups seeking sanctuary for their fugitive principals or who want to hide dangerous weapons may find the distant regions of some African countries inviting precisely because they are unlikely to be interrupted by government. The ability of terrorists to use Africa as safehaven only naturally increases the probability that these armed groups will seek to attack soft Western and Israeli targets on the continent. The likelihood of foreign terrorist groups operating in Africa is reduced, however, by the relative absence of effective communication links with the outside world, essential to international terrorist operations, and by the threat that these foreign groups would become mired in domestic conflicts.

Indeed, an overwhelming majority of terrorism in Africa will be caused by indigenous groups waging war against their own or neighboring governments or against other population groups, defined by religion or ethnicity. Indeed, most wars in Africa today seldom see armed, uniformed combatants fighting each other but are much more likely to involve poorly trained soldiers or guerrillas terrorizing local populations. The tendency for those killed in African conflicts to be women, children, and other civilians is likely to remain or perhaps get worse.

African countries will actively seek the increasing amount of available Western counterterrorism funding, especially given the threat from international terrorists to their own domestic situations even if the targets are foreigners. For instance, the attacks in Mombassa on Israeli targets in 2002 undoubtedly hurt Kenya far more than Israel, as international tourism to East Africa was dealt a stunning blow.

Everyday Violence

The less understood aspect of violence in Africa is the everyday threats that an increasing number of citizens face. Africa will continue to become far more dangerous as the supply of machine guns, rocket-propelled grenades, and mortars becomes even easier to access. The increasingly number of unemployed and impoverished will further increase the level of crime and general insecurity. There is also no reason at present to believe that the police in most African countries will become more adept, especially given the funding crisis that most African countries will face. However, states with high levels of violence will not automatically be failed states; indeed, the ability of African countries to continue to muddle along despite high levels of violence should not be underestimated. For instance, 20,000 people have been killed in Nigeria while that country has maintained its democratic façade. Thousands have also died in Congo during the period when all formal fighting was supposed to have ended.

The NIC 2020 report argues that pervasive insecurity will occur across large parts of the world as economic and political processes upset traditional practices. Insecurity will be very high in Africa, although it is more likely to stem from political conflict and crime rather than economic change, which has the potential for a significant upside.

Democracy in Africa

Most countries in Africa will continue to hold multiparty elections on a regular basis, although these elections will continue to vary considerably in quality. Almost all countries across the continent will continue to proclaim a public adherence to democracy and no other form of government will significantly challenge the nominal allegiance to regular elections. The media will continue, in most countries, to reflect a variety of viewpoints. The continued liberalization of radio and television will produce a cacophonous stream of African political views. The impact on domestic politics of this liberalization is difficult to assess, although it can be expected to produce more visibly contentious processes of government, particularly given greater vitality in the NGO sector. NGOs are increasingly the loyal opposition in the African polity given weak institutions and immature methods of parliamentary practice.

Typology of Democratic Achievement

However, commitment to democracy in Africa will remain a “mile wide and inch thick.” Therefore, the critical determinants of democratic success will be the social coalition that actually is actively in favor of democracy. The **democratic consolidators** will make significant gains in improving their democratic performance. Indeed, multiparty elections will become institutionalized in these countries and they will improve the operations of their parliaments, courts, and other institutions. By 2020, for this set of African countries, any turnback from democracy will be almost inconceivable.

It is likely that the countries making the most progress on democracy are the ones that have already had free and fair elections. Democratic consolidations will, on average, be in the coastal countries, where relatively strong civil societies are committed to democracy and have already spent a decade or more (as was the case in both Ghana and Kenya) pushing authoritarian rulers aside. The “plateauing” of African states—that is, the difficulty states confront in changing their relative democratic performance over the next 15 years—is due largely to structural factors that determine the size of the urban-based elite demanding democratization. In most countries, this

elite has now exercised whatever power that it can. As a result, there are unlikely to be too many democratic surprises over the next 15 years.

The advantage of coastal countries that have elements of civil society committed to democratization can be seen when comparing Kenya with Uganda. Although Uganda stabilized in the late 1980s and has had excellent economic performance for the past 15 years, it has lagged on democratic performance and is one of the few African countries where there is still an argument about the benefits of multiparty democracy. Kenya experienced authoritarian rule for a much longer period of time but, once the old rulers were finally removed from office, has made democratic progress at a relatively higher rate.

Another set of approximately 15 to 20 countries will continue to be **democratic aspirers**. Most will continue to have multiparty elections, but the quality will vary and citizens will continue to believe that there is a significant possibility that their democratic system or certain basic institutions face the real danger of collapse. Finally, about twenty states—roughly the same number as today—will experience **authoritarian or semi-authoritarian rule**. These countries may have regularly scheduled multiparty elections but the outcome of those votes will not be in doubt. Also included in this category will be the increased number of failed states in Africa that will not have even the mechanisms for voting in place.

There will probably be considerable movement between the last two categories of countries that aspire to democracy and those that have essentially authoritarian rule. Indeed, given that multiparty elections will continue throughout the continent, there will be relatively few old-style authoritarian states that do not hold elections at all.

The forms of democracy that African countries adopt or aspire to will not be substantially different from the current variety of western practices. There is, of course, considerable diversity in Western democratic practices (compare Switzerland to the United Kingdom) and African countries will adopt a similar variety of practices. However, there will not be a palpable form of “African democracy” that is adopted commonly across the continent.

Indeed, it is federalism—a particular form of Western democracy—that is increasingly being adopted across Africa. Whether federalism is a comprehensive, or even appropriate, answer to Africa’s problems remains unclear. Federalism is more likely to succeed if the impetus for conflict is ethnic division that has a strong geographic component. As Africa’s ethnic communities still have a territorial basis, federalism may well work to devolve the locus of resource disputes from the center to the periphery. In contrast, if African conflicts are more centered on religion, it will be far more difficult for federalism to be effective because religious identity is less likely to be geographically defined. Indeed, religious identity is changing quickly in Africa and will therefore thwart many efforts to draw boundaries around defined communities of believers. The success of federal attempts will depend, too, on the ability and willingness of central governments to permit funding of regional, alternative centers of power and authority.

AIDS

The AIDS trend in Africa will obviously depend on technological developments, especially the production of a vaccine. However, even if with relatively optimistic assumptions about a

vaccine and the roll-out of anti-retrovirals (ARVs), it is clear that there will be very large increases in the number of people who will die in the next ten years. The rates of infection in Southern Africa are remarkable because no one ten years ago had predicted that 35 percent of the adult population (about the levels in Swaziland and Botswana) could actually be infected. In other parts of Africa, rates are much lower. In particular, much of West Africa has yet to see the disease breakout beyond the 5 to 7 percent infection rate. Why this is so is unclear, but there appears to be an inverse relationship between infection rates and the percent of the population that is Muslim.

Progress will undoubtedly continue in the development and provision of relatively inexpensive ARV's. However, it is less clear that African countries have the medical systems to deliver the medicines effectively, nor, in some cases, the political will to roll these out. African countries currently do not provide formal medical care to a substantial portion—sometimes a majority—of their populations. Ramping up to a high level of ARV provision and monitoring will present such a substantial challenge that few African countries will be able to meet it in the near term. Moreover, improper distribution of antiretrovirals may prompt the mutation of even more virulent forms of the virus.

For years, the impact of AIDS on political and economic systems has been a source of immense speculation. Since AIDS tends to strike the working populations and the relatively affluent, as opposed to many diseases that afflict the old, the infirm, and the poor, it has the potential to deal a devastating blow to precisely the parts of the workforce where African countries are the weakest. Indeed, the figures regarding AIDS prevalence within important institutions are already shocking: some militaries are reporting that one-third of their soldiers are infected, with even higher rates among combat units.

However, it is not at all clear if AIDS can be directly tied to state collapse in the way that was feared a few years ago. The militaries that have high levels of infected soldiers largely work around the virus by releasing those who actually become sick and recruiting others. The virus also affects rebel groups and other challengers to the state; indeed, the virus may affect those who threaten the state more because they are less likely to have access to medicines. More generally, connecting the dots between AIDS prevalence and actual political and economic outcomes is extremely difficult. There is no doubt that having a significant percent of the most capable people die has economic costs and is a political burden. However, the prevalence of AIDS is highest in Southern Africa but this is also the region that has performed, overall, the best in Africa. Zimbabwe and Angola, the two poor performers in Southern Africa, can tie their poor governance records directly to the decisions made by their governments rather than damage caused by the virus.

New “Influentials”

The implications of the rise of India and China was another major emphasis in the NIC 2020 report. China already has a significant impact on Africa as it searches for secure sources of raw materials. This has had the salutary effect of raising some basic commodity prices. China does not have clear political interests in Africa beyond waging its continual war against diplomatic recognition of Taiwan. To date, African leaders have responded to China's interest in Africa positively, seeing it as an alternative source of investment and countervailing force to Western

interests and influence, a perception heightened by the Chinese practice of offering ‘gifts.’ Over time, however, African states may begin to realize that China’s interest is motivated less by altruism than by hard-nosed business concerns. Tensions may be exacerbated by the flooding of African markets by cheap Chinese goods, with a consequent effect on weak domestic manufacturing bases, and by the presence of larger numbers of Chinese workers in Africa.

Over the next 15 years, there is probably a greater possibility of India developing a distinct foreign policy with political interests toward Africa. India has the relative advantage of geography and of speaking English. India also has a strategic interest in the Indian Ocean. Indeed, it is more likely that India will have a foreign policy toward the Indian Ocean littoral than to Africa in general, as evidenced by the development of the IBSA (India, Brazil, and South Africa) forum.

At the same time, some of the traditional powers that have engaged Africa are likely to leave the scene gradually. The generation of French leaders who saw their country’s destiny intertwined with Africa has now retired and their successors see their future in Asia and Central Europe. The United Kingdom has been progressively disengaging since independence, even though it will continue to influence the policies of international institutions toward Africa.

As politics abhors a vacuum, other powers will find Africa an inviting arena. Iran, Egypt, other middle range powers may find it relatively easy to maneuver in Africa. However, it is likely that, overall, there will be less foreign involvement in African affairs, leaving more room for African powers and domestic agents to influence individual countries and the paths of conflict.

Religious Conflict

The NIC 2020 report notes the rise of identity politics everywhere and that communal conflict will become increasingly important as NGOs and others vie for attention. Africa has experienced some religious conflict to date, especially in Nigeria, but one of the great unanswered questions is how much more violence religious diversity will promote. Africa is at the center of many proselytizing efforts worldwide: the Catholic Church has made Africa a priority while Pentecostal and Evangelical Christian movements spend millions of dollars on recruiting large numbers of Africans. Iran has also devoted substantial efforts to fostering its religious and political views in Africa. Finally, Saudi Arabia has spent large amounts of money to export its exclusionary Wahhabi tradition.

The state system in Africa is unlikely to divide into Muslim versus non-Muslim states, not least because of the split personality of many African states in this respect. North African states will continue to identify much more with the Middle East and will probably not have active foreign policies toward Africa. The interior African states, composed overwhelmingly of Muslims, are unlikely to pose any threat to their neighbors. It is highly unlikely, no matter other domestic developments, that Nigeria will develop a distinct identity as a Muslim state, although religious conflict centered around Islam within Nigeria is likely to continue.

On the other hand, the states with significant Muslim populations on the East Coast of Africa (e.g., Kenya, Somalia, Djibouti) may be drawn into the conflict/terror networks emerging out of

the Arabian Gulf. There are deep historical links between East Africa and the Gulf and continual traffic in people, including, possibly, principals in terror networks.

Rather than explicit conflict fueled by religious extremism, it is likely that the most important related trend in Africa affecting the United States is the further development of pockets of radical Islam that are hostile to the West and that actively provide support and sanctuary to international terrorists. Radical Islam will find explicit support amongst a small but increasing number of state officials, as is the case in Northern Nigeria today. More common will be the adherents of radical Islam who find friendly communities grateful for material support from Iran and/or Saudi Arabia, and who can operate with relatively little fear of government detection.

Upside Surprises

While all are low probability, a variety of issues might cause our analysis to be incorrect in certain areas and, more generally, not optimistic enough. Certainly, if **hydrocarbon management** were improved across the continent, Africa's future in 2020 would look distinctly more positive. If Angola, Nigeria, and Sudan—three of Africa's largest and most important countries—actually began to use their revenues from oil in productive ways, these states would become stronger, tens of millions of Africans would benefit from reduced poverty, and the impact on the region might be significant. Better hydrocarbon management might come about because of international pressure to promote the transparency of resource flows, aided by domestic constituencies who have grown tired of the fraud associated with wasting assets.

Similarly, if **agriculture** were to show productivity gains in a significant number of countries, there would be a general boost in growth, but also a change in the urban-rural terms of trade that we portray above as generally favoring the cities. African agriculture could become more productive if it was the beneficiary of the kind of scientific advances that helped Asian agriculture in the 1960s and 1970s. Africa currently has the lowest level of inputs and the lowest yields compared to genetic potential of any region on earth. Thus, in many areas where there is substantial "low-hanging fruit" relatively small amounts of investment could lead to significant productivity advances. Of course, the same genetic modification technology that might help African agriculture could potentially hurt the comparative advantage of other African countries. For instance, genetic advances that allowed other countries elsewhere in the world to grow high quality tropical beverages (cocoa, tea, coffee) would hurt many African countries.

Technological developments that allowed Africa **to fight AIDS, malaria, and other infectious diseases** in an appropriate manner would also be extremely significant and would probably deflect upward the political and economic trajectory of some countries. It is unfortunate to note that, primarily because of AIDS and ever-more-resistant mosquitoes, Africa has become a far more unhealthy place than it was 15 years ago. Technological developments in the next 15 years that allow the continent to regain this lost ground would be vitally important (and probably surprising) but would only return the region to where it was in the early 1980s.

Another upside surprise that would be of great significance would be the **development of regional and internal peacekeeping doctrine and capabilities** that would allow for more timely interventions in African conflicts and more decisive resolutions to the wars. Currently,

peacekeeping efforts in Africa face a variety of problems, from getting rebels to the table, to supplying the correct number of peacekeepers armed in ways that they can actually project force, to finding mediators who are actually willing to call an end to negotiations if progress is not being made. If the necessary continental or international architecture were to be developed so that war could be addressed more forthrightly, our projections for Africa would improve considerably. Similarly, if more effective practices of international assistance in developing local police forces could be found, domestic stability and security may improve, a critical precursor to greater investment and growth.

Finally, positive developments in the management of **international debt** might be helpful to Africa. The prospects for increased levels of investment, both private and public, will be affected by how the continuing high levels of international indebtedness are addressed over the period of our projection. There now seems to be a clear consensus that repayment of international debt is not consistent with maintaining adequate levels of economic growth and the international community is exploring different ways to achieve the needed debt relief. Accomplishing this is a necessary, but likely not a sufficient condition, for private sector investment in most countries (apart from the mineral sector), while the public sector resources liberated by debt relief are in many cases targeted toward health and education, among other areas, by the international organizations organizing and promoting debt relief efforts.

Downside Risks

Other potential developments might accelerate decline in Africa and reduce even our limited optimism. The most important would be the **outright collapse of Nigeria**. While currently Nigeria's leaders are locked in a bad marriage that all dislike but dare not leave, there are possibilities that could disrupt the precarious equilibrium in Abuja. The most important would be a junior officer coup that could destabilize the country to the extent that open warfare breaks out in many places in a sustained manner. If Nigeria were to become a failed state, it could drag down a large part of the West African region. Even state failure in small countries such as Liberia has the effect of destabilizing entire neighborhoods. If millions were to flee a collapsed Nigeria, the surrounding countries, up to and including Ghana, would be destabilized. Further, a failed Nigeria probably could not be reconstituted for many years—if ever—and not without massive international assistance.

While many other downside risks are imaginable given the precarious state of most African countries, the possibility of some type of **ecological downturn** should be noted. Such a large portion of Africa hovers just above poverty and is still so dependent on the land that the continent is still especially vulnerable to changes in climate or the outbreak of new diseases. There is also the possibility for **conflict over water** among the ten riparian states that comprise the Nile Basin. The relationship between Ethiopia and Egypt has been tense for years because of water and, if not handled carefully, this issue has the potential to be the next big conflict in Africa.

Conclusion

Perhaps the central message of this report is that in an age of globalization, local factors will determine Africa's fate. Geography, decisions by governments past and present, the presence of trained professionals, the strength of civil society groups promoting democracy, and the capabilities of the local police and security forces all have the potential to decisively affect the performance of individual African countries in the next 15 years. Such forces are not determined by international markets in the first instance, although the reaction of global forces to local developments in any of these areas must be considered. As none of these basic aspects of the political system can be changed easily, if at all, in as short as 15 years, the most likely prediction is that the current hierarchy of African performers will continue, albeit distributed across an ever broader spectrum. Globalization may be the "megatrend" of the 21st century but Africa's destiny still is to be determined by African circumstances.