BTI 2020

A Changing of the Guards or A Change of Systems?

Regional Report Sub-Saharan Africa

Nic Cheeseman

BertelsmannStiftung

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By Nic Cheeseman

Overview of transition processes in Angola, Benin, Botswana, Burkina Faso, Burundi, Cameroon, Central African Republic, Chad, Democratic Republic of the Congo, Republic of the Congo, Côte d'Ivoire, Djibouti, Equatorial Guinea, Eritrea, Eswatini, Ethiopia, Gabon, The Gambia, Ghana, Guinea, Guinea-Bissau, Kenya, Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritania, Mauritius, Mozambique, Namibia, Niger, Nigeria, Rwanda, Senegal, Sierra Leone, Somalia, South Africa, South Sudan, Tanzania, Togo, Uganda, Zambia and Zimbabwe

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Author

Nic Cheeseman
Professor of Democracy and International Development
University of Birmingham

Responsible

Robert Schwarz
Senior Project Manager
Program Shaping Sustainable Economies
Bertelsmann Stiftung
Phone 05241 81-81402
robert.schwarz@bertelsmann-stiftung.de
www.bti-project.org | www.bertelsmann-stiftung.de/en

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Executive Summary

Contrary to media depictions of sub-Saharan Africa, in many countries political change has tended to occur gradually. From 2015 to 2019, the general pattern has been for the continent's more authoritarian states – such as Djibouti, Equatorial Guinea, Eritrea, and Rwanda – to make little progress towards democracy and in some cases to become incrementally more repressive. At the same time, many of the continent's more democratic states – including Botswana, Ghana, Mauritius, Senegal, and South Africa – have remained "consolidating" or "defective" democracies, with very few dropping out of these categories to become "authoritarian" regimes. Overall, only 16 countries saw their ranking in any one of the categories between the last two rounds of the BTI: this represents just 12% all cases, given that the BTI reviews 44 countries across three main categories. The main exceptions to this rule are countries that have suffered a rapid escalation of conflict (such as South Sudan in 2013), or the sudden collapse of the government (such as Burkina Faso in 2015).

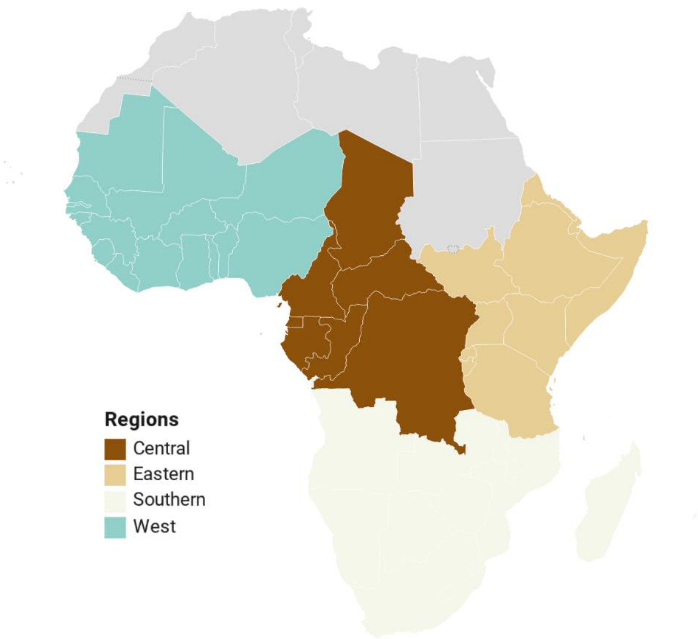
The current reporting period from February 2017 to January 2019 also saw significant, if not transformative, developments in a number of states including Angola, Cameroon, Chad, Ethiopia, Kenya, Sierra Leone, Tanzania, and Zimbabwe – although in few of these cases was here a change to the underlying character of the political system. While Cameroon, Chad, Kenya and Tanzania have moved further away from lasting political and economic transformation, Angola, Ethiopia, Sierra Leone and Zimbabwe initially appeared to be making progress towards it. However, in Ethiopia and Zimbabwe this impression did not last beyond the end of the BTI reporting period, and the new governments of both countries now stand accused of committing similar human rights abuses to their predecessors.

As this brief overview suggests, at a continental level the trajectories of different states have by and large cancelled each other out. Positive trends in some cases were wiped out by negative trends in others. Consequently, sub-Saharan Africa as a whole has witnessed no significant changes to the overall level of democracy, economic management and governance – the three main areas of performance covered in this report. Between BTI 2018 and BTI 2020 the overall level of democracy declined by just -0.04, a small shift on a 1-10 scale. There was an identical change in the status of economic transformation, and an even smaller shift in the average quality of governance of +0.01. Overall, these figures demonstrate remarkable continuity at the continental level.

In almost all cases, positive trends were recorded in countries where leadership change generated hope for political renewal and economic reform. This includes Angola, after President José Eduardo dos Santos stepped down in 2017, Ethiopia, following the rise to power of Prime Minister Abiy, and Zimbabwe, where the transfer of power from Robert Mugabe to Emmerson Mnangagwa was accompanied with promises that in future the ZANU-PF government would demonstrate greater respect democratic norms and values. Sierra Leone also recorded a significant improvement in performance following the victory of opposition candidate Julius Maada Bio in the presidential election of 2018, while Nigeria has continued to make modest but significant gains in economic management since Muhammadu Buhari replaced Goodluck Jonathan as President. The significance of leadership change to all of these processes is an important reminder of the extent to which power has been personalized in many African states. It is important to note, however, that subsequent events since the end of the period under review in 2019 have cast doubt on the significance of these transitions. Most notably, continued and in some cases increasing human rights abuses in countries such as Nigeria, Tanzania and Zimbabwe suggest that we have seen “a changing of the guards” rather than a genuine transformation of political systems.

If we turn our attention to those countries that recorded negative trends, we see a very different pattern: deteriorating performance typically occurred in countries in which established leaders felt the need to adopt increasingly repressive strategies to retain control, and to subvert economic management to serve political ends as part of this effort. In some cases, this was in response to a strong challenge from the opposition (Kenya, Zambia), while in others it reflected an increase in popular unrest (Chad), and secessionist challenges to the legitimacy of the state itself (Cameroon). The only country to witness a significant decline in overall status in the absence of growing opposition was Tanzania, where the fall in the quality of governance under President John Magufuli appears to reflect more his personal leadership style and refusal to tolerate dissent than any actual increase in support for political rivals.

Map: Sub-Saharan African regions



While these changes were fundamentally driven by domestic politics, the BTI Africa Report 2020 also documents important regional variations that merit further research and explanation. Southern and West Africa perform best on all three criteria – democracy, market economy and governance – with East and Central Africa lagging considerably behind. This reflects the historical process through which governments came to power, the kinds of states over which they govern, and the disposition and influence of regional organizations. In particular, East Africa features a number of countries ruled by former rebel armies (Burundi, Eritrea, Ethiopia, Rwanda, Uganda), in which political control is underpinned by coercion and a long standing suspicion of opposition. This is also a challenge in some Central African states, but with the added complication of long running conflicts and political instability (Central African Republic, Chad, Democratic Republic of Congo) that have undermined government performance on a number of dimensions.

In this way, the BTI 2020 reveals a high degree of continuity in many African political systems, while also highlighting profound regional variations and the extent to which the past continues to shape the present.

Introduction

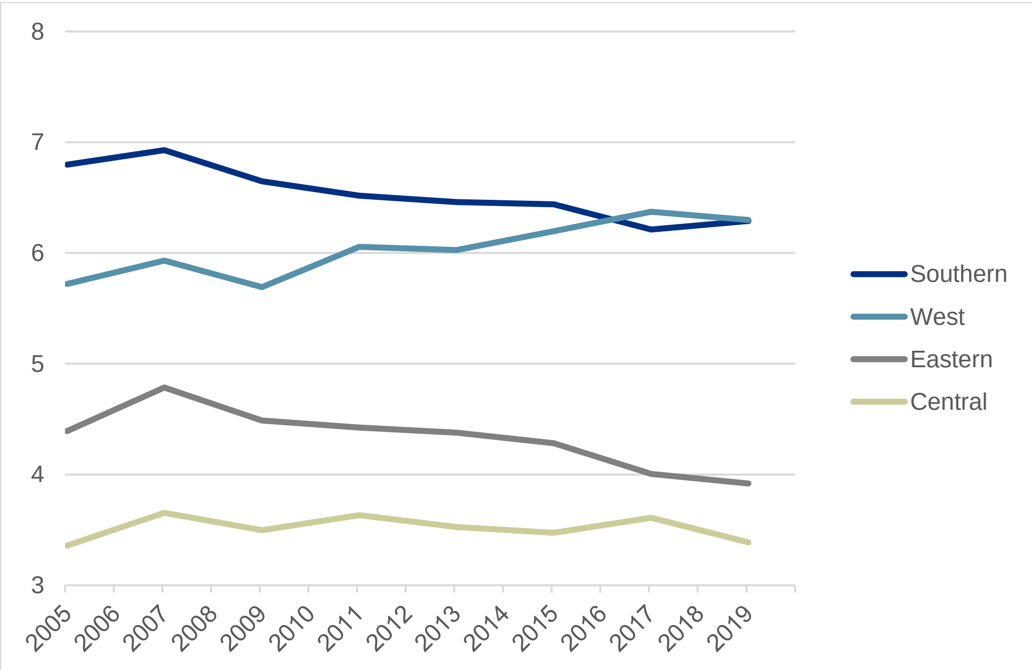
For the last few years, the African political landscape has been dominated by significant political transitions in Ethiopia (2018), South Africa (2018), Sudan (2019) and Zimbabwe (2018), where leadership change promised to bring about not only a new man at the top, but also a new political and economic direction. Along with peaceful transfers of power in Liberia (2017), Sierra Leone (2018), and to a lesser extent the Democratic Republic of Congo (2019), the arrival of leaders who promised widespread reform also gave a much needed boost to pro-democracy activists across the continent. Ongoing demographic shifts were also cited as evidence that the time of Africa's "old men" was over, and that a new era of accountability was on the way. Particularly important in this regard was evidence from countries such as Uganda that the interaction between evermore urban and youthful populations was generating greater support for a new kind of political leader, such as the outspoken musician turned legislator Bobi Wine.

The optimism generated by these changes was consistently tempered, however, by a weary recognition that while a number of long-standing leaders left power, some of the underlying political and economic challenges facing their countries remained. In Zimbabwe, the use of repression to intimidate opposition parties and civil society groups led to accusations that despite all the rhetoric there was little difference between the new administration of President Emmerson Mnangagwa and the old Robert Mugabe regime. In South Africa, President Cyril Ramaphosa quickly found that there were powerful vested interests within the state and the ruling African National Congress (ANC) set on resisting his efforts to move against the corruption that had become commonplace under his predecessor, Jacob Zuma. In Ethiopia, Prime Minister Abiy Ahmed hit the ground running, freeing political prisoners and promising a more inclusive government, but has struggled to bring rising ethnic tensions and localized violence under control. The picture is even more problematic in the DRC, where many believe that the wrong opposition candidate declared as the winner of the elections in the Democratic Republic of Congo in order to protect the interest of the outgoing president and his allies, who feared that the true winner would be too independent for them to be able to retain control.

This complex reality demonstrates two important points. The first is that the fragility of democratic institutions and the personalization of power within the individual who occupies the executive means that leadership change is typically seen to be necessary for wider political and economic reform. This means that the removal of a "Big Man" is often greeted with great enthusiasm by citizens, civil society groups and outside observers alike, who view such transitions as an opportunity for far-reaching national renewal. The second is that in reality the scope of what individual leaders can – and want to – achieve is significantly constrained by the political and economic context within which they must operate. Although presidents can and often do wield vast power – especially in the continent's less democratic states – they also face significant restraints, including: demands from supporters and allies to be rewarded for their loyalty; the need to protect the interests of the security forces in order to reduce the risk of a potential coup; and, powerful pre-existing networks of civil servants and businessmen who exploit their privileged access to the state for personal gain, and can prove to be powerful opponents if their position is threatened. Taken together, these pressures often make it difficult to deliver justice for past human rights abuses, escape winner-takes-all political dynamics, and establish more accountable forms of politics. Indeed, the tendency for new leaders to be recruited from within the ruling elite itself – as Ahmed, Mnangagwa, and Ramaphosa all were – means that while they like to present themselves as a break with the past, the continent's "new brooms" are already implicated in the misdeeds of the past.

It is also important to keep in mind that away from the high profile stories of leadership change lie many more stories of continuity. Despite the fall of some of the continents longest serving leaders – including Yahya Jammeh (2017), Omar al-Bashir (2019) and Robert Mugabe (2019) – Africa still contributes half of the world's ten longest serving leaders. This includes Paul Biya of Cameroon (since 1982), Teodoro Obiang Nguema Mbasogo of Equatorial Guinea (since 1979), Yoweri Museveni of Uganda (since 1986), Idris Déby of Chad (since 1990) and Isaias Afwerki of Eritrea (since 1993). The length of tenure of these presidents is significant, because recent research has found that the longer a leader is in power, the more likely they are to try and rig elections.[1] It is therefore unsurprising that the ongoing struggle for democracy across much of the continent is once again evident in BTI 2020. While Africa boasts two high quality democracies – Botswana and Mauritius – and a number of defective democracies, most countries are better thought of as electoral-authoritarian states; i.e. they hold elections but without all of the trappings of democracy, and so power rarely changes hands. In these countries, opposition parties often find themselves fighting two battles at the same time, one to win more votes in the next election, and the other to demand stronger and more independent democratic institutions so that if they secure the most votes they are actually allowed to win.

*Figure 1. Average Democracy scores for African regions, BTI 2006-2020**



*To preserve the consistency of time-series, the following countries are not considered in this chart as they were added to the BTI country sample later than 2006: Equatorial Guinea, Republic of the Congo, Gabon (Central), Djibouti, South Sudan (Eastern), Eswatini, Lesotho (Southern), Gambia, Guinea-Bissau, Mauritania (West).

The extent of progress towards democratic consolidation varies tremendously across the continent, and in addition to the well-known differences between leading lights like Botswana and entrenched laggards like Rwanda there is also a profound regional variation that is less well recognized and

[1] Nic Cheeseman and Brian Klaas, How to Rig an Election, Yale University Press, 2019.

understood. From relatively similar starting points in the early 1990s, there has been a sharp divergence between West and Southern Africa, which became and remain more open and democratic and Central and East Africa, which became and remain increasingly more closed and authoritarian (figure 1). This pattern is reflected in BTI Africa Report 2020, which explores and seeks to explain some of these variations, while recognizing that each region also contains a variety of very different political systems.

The challenge of overcoming historical legacies has also been apparent in the past two years when it comes to economic transformation. One of the major economic developments of the recent period has been the identification of significant oil deposits in Ghana, Kenya, Uganda and, recently, Namibia, and major gas holdings in Mozambique and Tanzania. The value of these natural resources has the potential to increase government revenues dramatically, enabling ruling parties to develop better national infrastructure and to provide better services, but there are also many barriers to achieving this goal. Limited infrastructure increases the length of time and cost that it takes to bring oil and gas reserves to market, and often requires complex negotiations over the route that pipelines will take. At the same time, the potential for political instability – most notably in Mozambique and in the Turkana region of Kenya – has complicated the situation facing foreign investors, who are often required to fund large infrastructure programs. Partly as a result, developing natural resources in an effective and efficient way is often more challenging than it first appears.

A second major development has been efforts to reduce barriers to trade by creating the African Continental Free Trade Area (AfCFTA) in 2018. Covering 54 of the 55 member states of the African Union, AfCFTA is the largest free trade are in the world in terms of participating countries. The broader aim of AfCFTA is to increase trade between African countries in order to promote regional economic integration and sustainable economic growth. Initially, this will mean removing tariffs from 90% of goods, which the United Nations Economic Commission for Africa estimates will boost trade between African countries by 52% by 2022. As with efforts to promote regional economic integration, however, AfCFTA faces a number of challenges. The colonial legacy of a continent divided into numerous states – most of which have economies that are oriented to export valuable commodities to countries in Europe, North America, and increasingly China – creates powerful barriers to economic integration. Indeed, efforts to promote regional trade within the East African Community (EAC) and the Southern African Development Community (SADC) by reducing tariffs have often been undermined by distrust and the stipulation of large numbers of exemptions between supposed economic partners. It is therefore likely to be some time before AfCFTA realizes the increases in regional trade that many are hoping for.

In both the political and economic sphere, then, efforts to reform and innovate remain constrained by existing ideas, institutions, and networks.

Political Transformation

There was very little change (-0.04 on 1-10 scale) in the overall level of political transformation in sub-Saharan Africa between BTI 2018 and BTI 2020. The majority of African states remain in the "competitive authoritarian" category, in that they hold regular multiparty elections but do not fully respect citizen's political rights and civil liberties. As in previous rounds of the BTI, however, there is considerable variation on the continent between those countries that can reasonably be considered to be consolidating (2 countries), defective (13) or highly defective (7) democracies and those that are in reality moderate (9) or hard-line (13) autocracies.

The continuity in the overall quality of democracy in Africa is the result of two different trends. On the one hand, the vast majority of countries experienced gradual political change during this period, remaining in the same category as BTI 2018. On the other hand, where change occurred, the movement of countries towards and away from democracy tended to balance out, resulting in no overall change at the continental level.

Tab. 1: Status of political transformation

Consolidating democracies	Defective democracies	Highly defective democracies	Moderate autocracies	Hard-line autocracies
Scores 10 to 8	Scores <8 to 6	Scores <6	Scores >4	Scores <4
Mauritius	Ghana	Guinea ▼	Uganda	Rwanda
Botswana	Benin	Côte d'Ivoire	Togo	Djibouti*
	Namibia	Mali	Kenya ▼▼	Burundi
	South Africa	Zambia ▼	Gabon*	Eswatini*
	Senegal	Lesotho	Angola	Cameroon
	Gambia*	Nigeria	Mozambique	Central African R. ●
	Liberia	Madagascar	Zimbabwe ▲	Congo, DR ●
	Malawi		Mauritania	Congo, Rep.
	Guinea-Bissau*		Ethiopia ▲	Chad
	Sierra Leone*			Equatorial Guinea
	Burkina Faso			South Sudan ●
	Niger			Eritrea
	Tanzania			Somalia ●

The table follows the BTI 2020 index scores. The countries are ranked according to their respective score in the Democracy Index. Arrows mark a change of category compared with the BTI 2018, dots mark failing states. Asterisks mark newly assessed countries.

The most significant positive gains were all recorded in countries that experienced a change in leadership either just before or during the last round of the BTI, including Ethiopia (2018), Nigeria (2015), Sierra Leone (2018) and Zimbabwe (2018). This demonstrates the extent to which power remains personalized in many African states, and the capacity of individual leaders to reshape the political landscape. This has long been one of the most powerful tropes about African politics: the power of the "Big Man" and the limited constraints under which presidents and prime ministers operate. It is important not to exaggerate the power of individual leaders, however, or to overlook the fact that they inherit political and economic systems that had deep roots and are staffed by individuals who often have a vested interest in preserving the status quo. New leaders also face a range of other constraints such as limited resources, weak infrastructure and societal tensions that limits what they can achieve in a short period of time. Indeed, the fact that the initial optimism in Ethiopia, Nigeria and Zimbabwe had begun to evaporate by the end of the current period demonstrates the extent new leaders struggle to free themselves from historical legacies.

Countries on the up

Ethiopia achieved the single biggest improvement in political transformation between 2017 and 2019, moving up +0.98 on a 1-10 scale, as a result of the rise to power of Prime Minister Abiy Ahmed on 2 April 2018. In office, Abiy (as he is known in Ethiopia) rapidly instigated a number of reforms including releasing political prisoners, promising better quality elections, and appointing a gender balanced cabinet. However, these efforts have come under serious strain as a result of continued political instability in some parts of the country and a failed coup attempt against the regional government in the Amhara Region in June 2019. As a result, it looks like the same political turbulence that enabled Abiy to secure the premiership will also constrain his ability to transform the country.

In Southern Africa, Zimbabwe was the only country to make significant progress where democracy was concerned, graduating from a hard-line to a moderate autocracy. Its improved score reflects the greater political openness surrounding the country’s 2018 elections, when the main opposition candidate, Nelson Chamisa, was allowed to campaign in rural areas in a way that his predecessor, Morgan Tsvangirai, had found impossible during the 2013 election campaign. However, hope that the country had experienced a major political turning point was subsequently undermined when the protests of opposition supporters against suspected electoral manipulation were violently repressed by the army, leading to at least six deaths.

In West Africa, two countries became significantly more democratic, although by small amounts (0.10): Nigeria and Sierra Leone. In Nigeria, this resulted from improvements in state capacity and the rule of law under President Buhari, who has focused his efforts on turning the tide against the Boko Haram insurgency in the north, strengthening the central state, and gaining greater control over the corruption that had spiraled out of control under his predecessor. However, as with Ethiopia and Zimbabwe, this has not led to a straightforward gain for democracy, and the quality of governance actually fell, as discussed in greater detail below. Moreover, the 2019 elections provide to be highly controversial, with suggestions that the government deliberately depressed turnout in some opposition strongholds. At the same time, the security forces stand accused of committing human rights abuses in their effort to contain growing secessionist sentiment in the East of the country, which has experienced renewed calls for the creation of a separate Biafran nation.

It might be expected that the change of government in the Democratic Republic of Congo (DRC) would have had a similar effect to the changes seen in Ethiopia and Zimbabwe – after all, the victory of Felix Tshisekedi represented a peaceful transfer of power to an opposition leader whose father was known for contesting authoritarian rule. But while the BTI records an improvement in both democracy and governance scores, these are relatively small at 0.05 and 0.11, respectively. The reason is partly that Tshisekedi was sworn in right at the end of the period covered by this round of the BTI, and so changes that took place under his rule will only be fully captured in the next round. However, a more significant explanation for the limited movement in terms the democracy is that few commentators believe that Tshisekedi actually won the election. Instead, it seems more likely that the election was won by Martin Fayulu, and that the outgoing president, Joseph Kabila, put pressure on the electoral commission to manipulate the election in Tshisekedi's favor.

The deal between Kabila and Tshisekedi appears to have been relatively straightforward. The president arranged for the candidate who had come a distant second to be announced the winner in return for assurances that his political and economic interests would be protected in the future. While Fayulu commanded considerable support and had strong links to some of Kabila's most powerful rivals such as Moise Katumbi Chapwe, the former Governor of Katanga, Tshisekedi's poor showing in the election threatened to leave him a political irrelevance. The two men therefore had much to gain by making a deal – and a great deal to lose by allowing Fayulu to emerge victorious.

From the very start of his administration, then, President Tshisekedi has faced accusations that he is little more than a puppet doing the dirty work of his predecessor. The common assumption underpinning these critiques is that any deal between the two men will inevitably include a veto on political and economic reforms that would significantly alter the status quo. Only time will tell how tightly Kabila will be able to enforce the terms of the agreement, and whether Tshisekedi will come to resent having a back seat driver in his government and seek to assert his own authority. Any major rift between the two leaders could cause considerably political instability, with serious consequences for the region (see Outlook).

Countries on the slide

The positive gains achieved by the four countries discussed above were effectively cancelled out by democratic backsliding elsewhere on the continent, most notably in Kenya, which recorded the largest decline (-1.40). This was mostly due to the 2017 general elections and their aftermath. Following the Supreme Court's nullification of President Kenyatta's controversial victory in the general elections held on 8 August 2017, a "fresh" election was held on 26 October. This was ultimately boycotted by the main opposition candidate, Raila Odinga, who argued that there had been insufficient time to make the changes that would have been required to run a free and fair poll. Efforts by pockets of opposition supporters to disrupt the elections led to clashes with the security forces, setting the scene for a period of prolonged political confrontation. After Odinga and his allies rejected the legitimacy of Kenyatta's victory and his supporters held a parallel swearing-in ceremony to inaugurate him as the "people's president", the heavy-handed response of the security forces resulted in over 100 deaths. Along with the verbal attacks on the judiciary by government leaders – including President Kenyatta himself – following the Supreme Court's declaration that his victory on 8 August was "null and void", this helps to explain why Kenya fell two categories, from defective democracy to moderate autocracy.

The other significant decline occurred in Chad, which was already rated as a hard-line autocracy but which nonetheless saw its political transformation score fall 0.52. This reflected efforts by President Idriss Déby to further repress opposition groups, which led to renewed criticism from Amnesty International and other human rights organizations. One of the reasons for the repression was President Déby's decision to force through a controversial new constitution that both extended his powers and will allow him to remain in office for two presidential terms *beyond* elections scheduled for 2021. These changes suggest that, like a number of other leaders such as Ugandan President Yoweri Museveni, Déby intends to be a “life president”.

Elsewhere, Zambia and Guinea were both relegated from the category of “defective democracies” to “highly defective democracies”, although in both cases this was due to a small decline in the actual BTI score. Nonetheless, this is a considerable cause for concern in both countries, especially in Zambia, whose trajectory under President Edgar Lungu has been troubling for some time. The previous BTI regional report for Africa captured the problematic fall out from Lungu’s victory in disputed elections in 2016, including the arrest of opposition leader Hakainde Hichilema on charges of treason in 2017. The last two years have witnessed further authoritarian abuses including sustained government efforts to intimidate and marginalize critical voices and a successful bid by Lungu to have the Constitutional Court – that he appoints – deem him an eligible candidate for the 2021 presidential election, when he will compete for a third term in office.[2] In turn, this suggests that the country is heading for another controversial election and further rounds of opposition protest and government repression.

Regional variations

Africa features profound variations in the level of democracy between its different regions (Figure 2). Reflecting the long-term trend identified in Figure 1, Southern (5.99) and West Africa (6.20) are considerably more democratic, on average, than Eastern (3.78) and Central Africa (3.48). This variation appears reflects a number of different historical and contemporary factors, but three in particular are worth highlighting here. First, over half of the states the BTI surveys in Central Africa – most notably the Central African Republic, Chad and the Democratic Republic of Congo – have either recently suffered a civil war or are experiencing an active insurgency, undermining the potential to build more durable and inclusive political institutions. While there are of course states experiencing conflict and insurgencies in West and Southern Africa – most obviously Nigeria and Mozambique – a much higher proportion of countries are peaceful and stable.

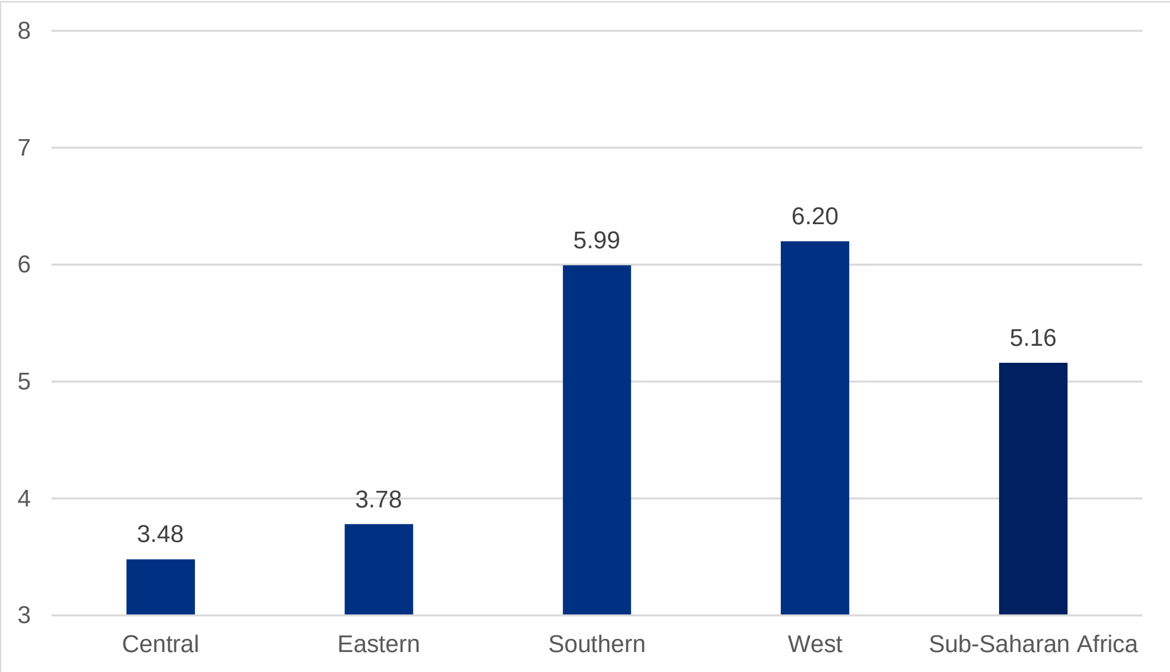
Second, many of the states of Central Africa and around half the countries in Eastern Africa – including Burundi, Ethiopia, Eritrea, Rwanda, South Sudan and Uganda – are led by individuals who came to power as a result of the victory of a rebel army. While they have transitioned into civilian clothing and swapped titles such as “general” for “president”, their governance styles have often reflected military rather than civilian priorities, such as an emphasis on discipline, hierarchy and the use of force to settle disputes. Partly as a result, they are less likely to recognize the value of dissent and tend to view opposition as inherently suspicious, relying heavily on coercive institutions to sustain their rule.

It is true, of course, that a number of former military leaders have also governed West African states – including Ghana, Nigeria and Togo – but the proportion has been lower and some states, such as Senegal, have a long tradition of plural politics and civilian leadership. In a similar vein,

[2] This was highly controversial, as Lungu is currently in his second presidential term and the country has a two-term limit. He argued that as his first one was short – he completed the term of President Michael Sata, who died in office in 2014 – that he should be allowed a third term. This was permitted under a new constitutional provision, but as the provision came in after Lungu took power, many critics argued that the previous constitutional arrangement should have held, in which case he would have had to step down in 2021.

while a number of former armed groups or "liberation" forces are in power in Southern Africa – including in Angola, Mozambique, Namibia, South Africa, and Zimbabwe – some of these developed out of broad based movements that placed a high value on political participation and civil liberties. Most obviously, the Freedom Charter adopted by the African National Congress in 1955 committed South Africa's future ruling party to promoting human rights and limiting the powers of the president and the police. Partly as a result, the impact of former military or rebel leaders taking power has been less deleterious – though still significant – to democracy in Southern and West Africa.

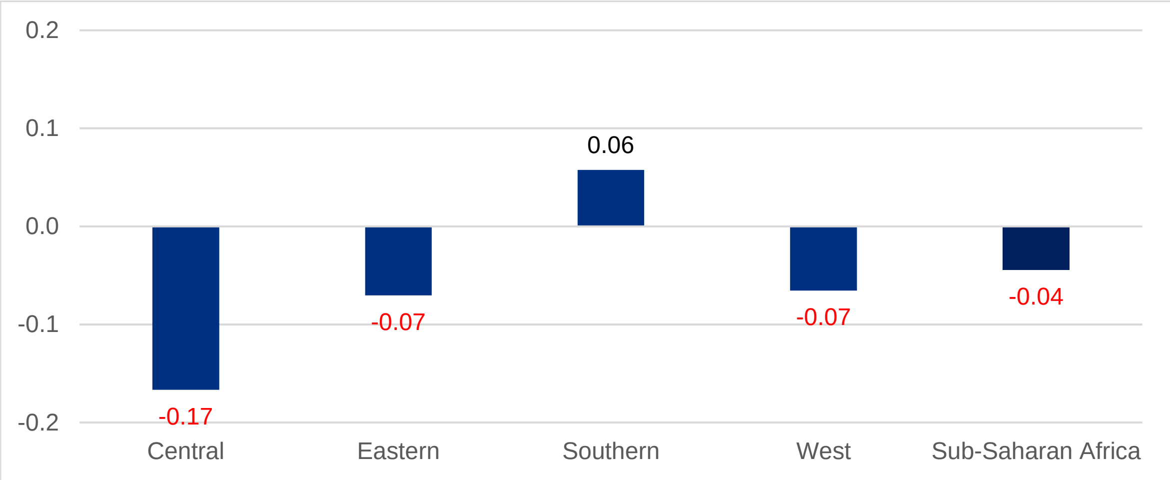
Figure 2. Quality of democracy in Africa, by region



Finally, regional politics has an important role to play in the political trajectory of African states. In West and to a lesser extent Southern Africa, the regional hegemon has used its influence to promote democratic change in its neighbors. For example, while Nigeria's own democratic status is far from assured, its leadership, along with that of democratic states such as Senegal, has been pivotal to the efforts of the Economic Community of West African States (ECOWAS) to promote democracy in the region. Most notably, ECOWAS played a critical role in forcing President Yahya Jammeh from power in 2017, after he had begun to dispute the victory of opposition leader Adama Barrow. Similarly, while the South African government has regularly been criticized for failing to do more to encourage President Robert Mugabe to reform during his time in power in Zimbabwe, it intervened militarily in Lesotho in 1998 in a bid to prevent what the then President Nelson Mandela described as a "virtual coup". There have been no comparable efforts by regional organizations to intervene to promote democracy in Eastern and Central Africa.

Although no region saw large shifts in the quality of democracy between BTI 2018 and BTI 2020 (Figure 3), the evidence suggests that the trends identified above are likely to continue. While the overall quality of democracy grew by a very small amount in Southern Africa, it fell by an equally small amount in Central and West Africa. The only region registering larger declines in the quality of democracy was Central Africa (-0.17). This was in large part driven by the repressive response of the government of Cameroon (-0.37) to the "Anglophone crisis", which came about as a result of growing frustration of English-speaking Cameroonians at their marginalization by the predominantly French-speaking regime. According to Human Rights Watch, government security forces committed a number of human rights abuses in their effort to put down the growing secessionist movement, including extrajudicial executions, arbitrary arrests and torture.

Figure 3. Democracy trend in Africa, BTI 2018-2020, by region



Events in Senegal (-0.15) played into the minor negative trend in West Africa, as the arrest of two of the main rivals of the president ahead of elections in 2019 paved the way for a landslide victory for President Macky Sall. Although the government claimed that the former Mayor of Dakar, Khalifa Sall, and the son of ex-president Abdoulaye Wade, Karim Wade, were prosecuted as part of ongoing anti-corruption efforts, Amnesty International protested that they had both suffered “unfair trails”. It remains to be seen whether these trends – and growing concerns about Benin, discussed below – represent the start of longer process of democratic backsliding.

Economic Transformation

There was no meaningful change (-0,04) in the status of economic transformation at the continental level between BTI 2018 and BTI 2020. Indeed, of all three of the main BTI categories, economic transformation was the one that saw the least recategorization of countries, with only three countries reclassified upwards (Central African Republic, Côte d'Ivoire and Zimbabwe) and only one reclassified downwards (Mauritius). Moreover, in two of these cases – Central African Republic (+0.04) and Mauritius (-0.07) – the magnitude of the change was extremely small and the reclassification occurred because the country was already very close to the threshold.

Tab. 2: Status of economic transformation

highly advanced	advanced	limited	highly limited	rudimentary
Scores 10 to 8	Scores <8 to 7	Scores <7 to 5	Scores <5 to 3	Scores <3
	Mauritius ▼	South Africa	Tanzania	Congo, DR
	Botswana	Uganda	Gambia*	South Sudan
		Rwanda	Guinea	Eritrea
		Ghana	Togo	Somalia
		Kenya	Madagascar	
		Namibia	Cameroon	
		Côte d'Ivoire ▲	Lesotho	
		Senegal	Zambia	
		Benin	Djibouti*	
		Gabon*	Burkina Faso	
			Malawi	
			Guinea-Bissau*	
			Liberia	
			Mali	
			Sierra Leone*	
			Mauritania	
			Mozambique	
			Niger	
			Nigeria	
			Angola	
			Ethiopia	
			Congo, Rep.	
			Eswatini*	
			Chad	
			Burundi	
			Equatorial Guinea	
			Central African R. ▲	
			Zimbabwe ▲	

The table follows the BTI 2020 index scores. The countries are ranked according to their respective score in the Market Economy Index. Arrows mark a change of category compared with the BTI 2018. Asterisks mark newly assessed countries.

In contrast to political transformation, where African states are spread fairly evenly over a number of categories, and governance, where they cluster towards the middle of the spectrum, when it comes to economic transformation the vast majority of states – 28 out of 44 – are located in the “highly limited” category, the second worst in the BTI scale.

This reflects the high number of different challenges that governments face including colonial legacies such as landlocked states and unbalanced economies, limited infrastructure, pressure to reward supporters rather than invest in public goods, and the difficulty of prioritizing long-term sustainability over short-term consumption in countries in which a significant proportion of citizens continue to live below or near the poverty line.

Between BTI 2018 and 2020, the biggest gains came in Cote d'Ivoire (+0.21), Nigeria (+0.25), and Zimbabwe (+0.18), while the biggest losses occurred in Burundi (-0.86) and Liberia (-0.21). With the exception of Burundi, these are all relatively modest changes, which again highlights the extent of continuity in this area.

Countries on the up

The biggest improvement was achieved in Nigeria (+0.25). This had less to do with an improvement in the overall quality of governance – which actually declined, as discussed below – and more to do with the impact of rising oil prices and the actions of the Central Bank to stabilize the currency. While the rate of economic growth remains modest at just 1.9% in 2018, and the country remains overly dependent on the proceeds of oil and gas exports, an improvement in the crude oil prices on world markets from their long-time low in mid-2016 of $40 per barrel to close to $70 per barrel at the end of 2018 gradually enabled Nigeria to pull out of its worst recession in 30 years.

Although macroeconomic conditions continued to be unstable, and the government struggled to identify and implement strategies to boost growth and reduce poverty, the overall economic position stopped deteriorating and foreign reserves slightly increased to around $43 billion towards the end of 2018. At the same time, well-timed injections of foreign exchange by the Central Bank stabilized the exchange rate on the parallel market at Naira 360 to the dollar – an impressive achievement given the numerous challenges that the country faces. Small improvements were also achieved in other areas, including respect for property rights.

Cote d'Ivoire also recorded a significant improvement (+0.21) as it continues its recovery from the damaging impact of prolonged civil conflict and political instability. In line with a gradual improvement since 2014, the period 2018-2020 saw further gains. Although economic growth fell from 10.1% in 2012 to 7.7% in 2017 and 7.4% in 2018, continued inflows of foreign direct investment (FDI) have enabled the government to reduce unemployment. At the same time, successive years of high growth rates have led to the expansion of the tax base to 18.2% of gross domestic income, which in turn has enabled the government to spend more on public services.

Partly as a result, while the country continues to suffer from a significant gender gap on most indicators – with women 14% less likely to be literate than men – the enrollment gap (the ratio of female to male enrollment in primary school) has improved to 0.9% at the primary level and 0.7% at the secondary level. There has also been an improvement in women's participation in the workforce, which increased from 37.3% in 2007 to 31.1% in 2019. Moreover, while President Alassane Dramane Ouattara has been accused of democratic backsliding, especially after the government disrupted opposition rallies in the lead up to the 2015 general elections, the victory of a leader from the north of the country has led to a reversal in the historical marginalization of communities from this part of the country, leading to greater equality of opportunity.

Finally, Zimbabwe's economic transformation was upgraded from "rudimentary" to "highly limited" as result of the reforms introduced and promised by President Mnangagwa, which led to a modest improvement of +0.18. In addition to pledging to respect private property – including offering compensation to farmers whose property had been seized during the land invasion era – Mnangagwa appointed the widely respected Mthuli Ncube, a former Vice President of the African Development Bank, as Finance Minister. This was initially accompanied by a reversal of President Mugabe's notorious hostility towards Western states, as the new government sought to adopt a more constructive tone towards the United States and the United Kingdom, hinting that the country might rejoin the Commonwealth and promising to open the country up to foreign investors. Mnangagwa also travelled to Davos for the World Economic Forum to give a speech in which he promised, "economics and trade cooperation would be my priority". However, critics quickly pointed out that behind the bold words the government had failed to make significant changes in key areas, in part because powerful groups – including established ZANU-PF figures and the military leaders who played a central role in forcing Mugabe from power – have a vested interest in preventing the reform of the sectors of the economy in which they operate. Along with rampant inflation, which hit an annual rate of 300% in August 2019, the highest rate in the world according to the International Monetary Fund, the lack of genuine transformation quickly began to undermine the confidence of both the public and foreign investors in the capacity and willingness of the Mnangagwa administration to deliver on its promises.

Countries on the slide

The recent experience of Cote d'Ivoire and Zimbabwe demonstrates the significance of political change to economic performance. While an end to civil conflict provided the foundation for Cote d'Ivoire's economic transformation, new political leadership was central to the (short lived) return of economic optimism in Zimbabwe. In a similar vein, political turmoil has often led to a rapid deterioration in economic performance. The best illustration of this relationship in recent years is the case of Burundi, where political instability and a descent into authoritarian rule have led to a fall of -0.86 in the country's rating for economic transformation.

This decline can be traced back to the onset of economic crisis in 2015. This period has seen rising unemployment and declining purchasing power, which was triggered by the political crisis that began when President Pierre Nkurunziza intimidated the Constitutional Court into allowing him to stand for a third term in office. This power grab led to opposition protests, a failed coup attempt, and rising repression. Against an increasingly authoritarian backdrop, and the absence of effective engagement with international donors and investors, Burundi has experienced rising debt – from USD $30.2 million in 2014 to USD $36 million in 2017 – at the same time as a gradual decline in the quality of life as measured by the Human Development Index.

The government's own actions in the economic sphere have contributed significantly to the worsening situation. The imposition of new taxes to finance elections has increased the burden on citizens and businesses that were already struggling, at a time when inflation has increased from just 4.4% in 2014 to 16.1% in 2017. Meanwhile, a shortage of credit and funds has led to growing government interference in the banking sector. According to the International Crisis Group, the Finance Minister required a number of banks – including the Burundi Commercial Bank, the Burundi Bank of Commerce and Investment, the Bujumbura Credit Bank, the National Bank of

Economic Development, and the Urban Habitat Fund – to pay their end-of-year dividends to the state rather than to their staff, creating a precedent that is likely to worry potential investors.

The other significant decline in economic management came in Liberia, which experienced a fall of -0.21 between BTI 2018 and 2020. This was largely due to the change of government in 2017, when George Weah won the presidency at the third time of asking. While the peaceful transfer of power spoke to the country's growing democratic maturity, it did not lead to an improvement in government policy. There were two aspects to this. First, the government of President Ellen Johnson Sirleaf lost its focus on key economic targets towards the end of her second term, when the attentions of the administration shifted to the succession struggle to replace her and the need to win the forthcoming election.

Second, the new Weah government failed to reverse this decline due to the composition of his coalition and the pressures that the new president was placed under to reward those who had financially backed his campaign – and had supported him in his previous unsuccessful endeavors. In particular, concerns over rising corruption and questionable economic deals involving members of his entourage – which contributed to a decline in the quality of governance that is described in greater detail below – suggest that long-term economic planning is being sacrificed on the altar of short-term political expediency. Unless Weah is able to withstand the pressure to allow his supporters privileged access to economic opportunities, a further decline is likely to be recorded in the next BTI report.

Regional variations

At the regional level, the picture is remarkably similar to that for democracy: Southern Africa leads the way followed by West Africa, with East and Central Africa lagging behind (figure 4). However, it is worth noting that the gap between the regions is smaller when it comes to economic management, and there are some signs that it is may shrink further due to a positive trend in Central Africa and a negative trend in Southern Africa (figure 5).

In Southern Africa, economic difficulties have been driven by a number of factors including the poor performance of regional hegemons, growing budget deficits, and a rising debt burden. Most notably, the South African economy, which is important for the Southern African region as both a key source of investment and an export market, has struggled, growing at just 1.3% per capita in 2017, followed by a contraction of 0.7% in 2018. Partly as a result of South Africa's economic slowdown, Eswatini, Lesotho and Namibia all suffered negative economic growth in either 2017 or 2018. Elsewhere in Southern Africa, rising oil prices eased the challenges facing the Angolan government, but did not rebound sufficiently to move the region's second largest economy out of recession. Having enjoyed growth of 6.5% between 2008 and 2010 when prices were higher, the petro-state saw negative growth in both 2017 and 2018. According to the African Development Bank, this contributed to a slowdown in regional growth from a recent high of 3.9% in 2011-2013 to 1.6% in 2017 and just 1.2% in 2018. In turn, this has negatively impacted on scores for economic performance and socioeconomic development.

West and Central Africa have fared somewhat better – the only two regions to record a positive trend between BTI 2018 and 2020, albeit one of negligible magnitude. In Central Africa, this reflected a more positive economic environment due to the rising value of key exports, most notably oil. Partly as a result, regional GDP growth accelerated to 2.2% in 2018, from 1.1% in 2017. Although this remained below the African average, it enabled governments to adopt marginally more ambitious economic policies, with all countries in the region experiencing no change or a positive trend in economic management, with the exception of the Republic of Congo. Serious challenges remain, however, including the fact that Central Africa is one of the least economically integrated regions in sub-Saharan Africa, and the potential for conflict and instability to undermine economic recovery.

Figure 4. Economic transformation in Africa, by region

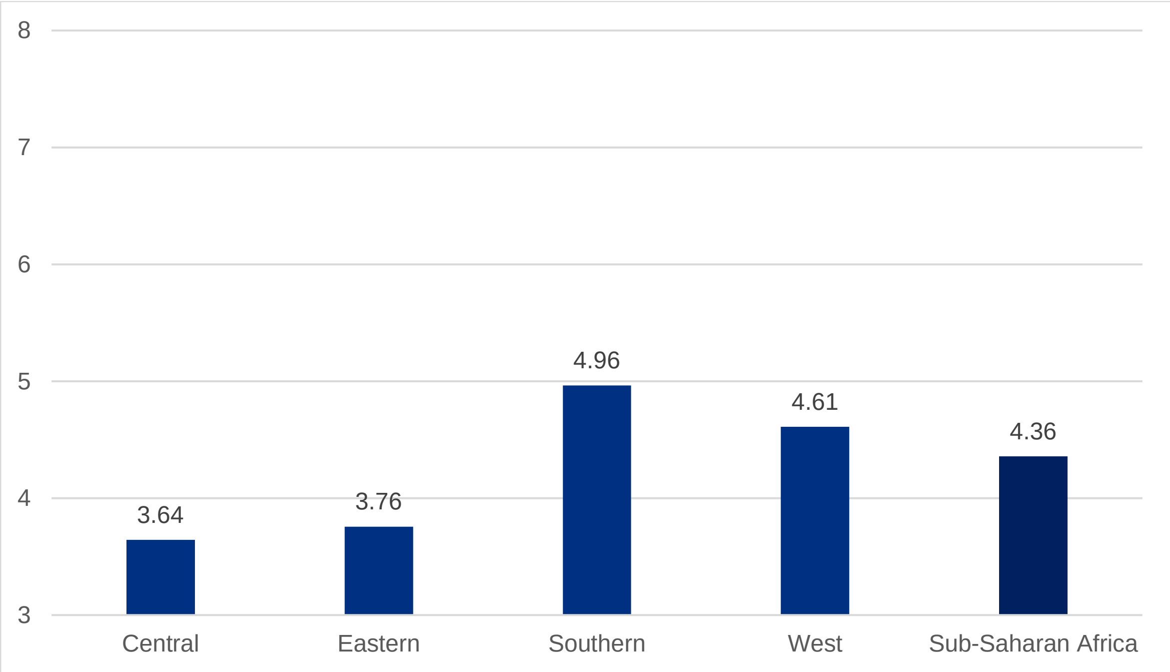
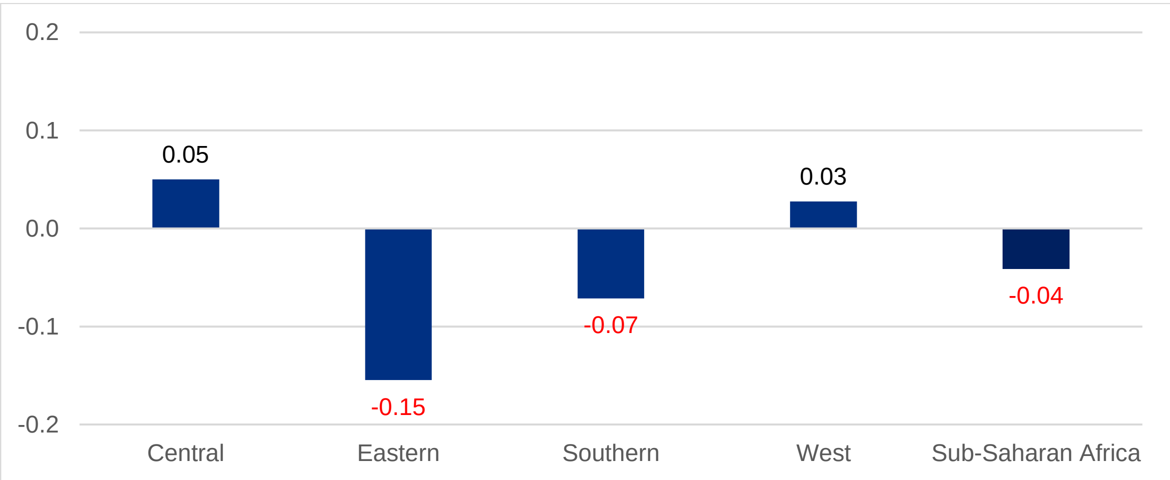


Figure 5. Economic transformation trend in Africa, BTI 2018-2020, by region



The recovery in oil prices also eased the economic situation in West Africa, where GDP growth increased from 2.7% in 2017 to 3.3% in 2018. Although this remained lower than in East Africa, a number of countries performed considerably better, with nine countries enjoying growth of at least 5%. As in Southern Africa, overall economic trends are largely driven by the state of the economy in the regional hegemon – in this case Nigeria, which contributes two-thirds of West African GDP.

Although rising oil prices led to the Nigerian economy moving out of recession, with growth recovering from 0.8% in 2017 to 1.9% in 2018, the African Development Bank argues that relatively low levels of oil production – in part due to the vandalism of oil installations in the Niger Delta – has limited economic expansion. Similarly, while the regional economic outlook has been strengthened by the end of the Ebola crisis, which undermined tourism and disrupted business networks in countries such Liberia, Guinea and Sierra Leone from 2014 onwards, the legacy of the epidemic continues to be felt and is one reason that economic growth remains modest – especially in the latter two countries.

The picture in East Africa is rather more mixed. The negative trend highlighted in figure 5 reflects the fact that some governments are not making the most of the economic opportunities available to their countries, most notably in Burundi and Uganda. Elsewhere, however, the overall economic situation has been relatively positive as a result of a robust period of economic growth, during which the largest economies – Ethiopia, Kenya and Tanzania – have consistently grown by more than 5% year on year. At the same time, only South Sudan has suffered negative economic growth as a result of the disruption caused by civil war. Consequently, according to the African Development Bank, Eastern Africa's GDP held steady from 2016 onwards at just under 6%. The challenges facing the region therefore came from other sources, including a deteriorating fiscal balance. In Burundi, the deficit has grown from -6.5% of GDP in 2017 to -8.8% in 2018. In Burundi, a -6.5% deficit increased further to -8.8%. In Djibouti, a high deficit of 15.3% in 2017 was followed by one of 15.5% in 2018. Eritrea has also experienced consistent double digit deficits over the last few years. Consequently, the overall fiscal deficit in the region increased to 3.8% of GDP in 2017 and then again to 4.1% in 2018. Thus, while growth has been relatively positive, the failure of many countries to deliver balanced budgets negatively impacted on the region's scores for monetary stability and economic performance.

Governance

There was also very little change in the overall quality of governance (+0,01) between BTI 2018 and BTI 2020. As in the previous round of the BTI, African countries are distributed as in a bell curve graph – in other words, the vast majority find themselves right in the middle of the spectrum (moderate governance) with relatively few receiving the best (very good) or worst (failed) scores. In line with the other categories discussed above, this continuity reflects the relative stability of a number of countries and the fact that what change has occurred at the country level has tended to balance out across the continent. For example, during the last round of the BTI, four countries were reclassified downwards (Liberia, Niger, Nigeria and the Republic of Congo) while three were reclassified upwards (Ethiopia, Mozambique and Zimbabwe).

Tab. 4: Quality of governance

very good	good	moderate	weak	failed
Scores 10 to 7	Scores <7 to 6	Scores <6 to 4	Scores <4 to 3	Scores <3
Botswana	Mauritius Senegal Ghana South Africa Benin Gambia* Guinea Malawi	Côte d'Ivoire Madagascar Liberia ▼ Niger ▼ Burkina Faso Rwanda Mali Namibia Djibouti* Uganda Ethiopia ▲ Togo Sierra Leone* Gabon* Kenya Guinea-Bissau* Zambia Tanzania Mozambique ▲	Angola Central African R. Nigeria ▼ Mauritania Cameroon Lesotho Equatorial Guinea Burundi Zimbabwe ▲ Eswatini*	Congo, Rep. ▼ Congo, DR Chad Somalia South Sudan Eritrea
The table follows the BTI 2020 index scores. The countries are ranked according to their score in the Governance Index. Arrows mark a change of category compared with the BTI 2018. Asterisks mark newly assessed countries.				

As one would expect, there is a correlation between significant shifts in democracy and in governance, and so some of the countries that experienced the largest increases in political transformation also made progress in this category (Ethiopia and Zimbabwe). However, a number of countries that saw no significant improvements in the overall quality of democracy nonetheless realized an improvement in their governance rating, most notably Angola and Benin. Conversely, a number of countries rated as “defective democracies” – the second highest category – only have moderate governance, including Burkina Faso, Liberia, Namibia, Niger, Guinea Bissau, Sierra Leone, and Tanzania. This serves as an important reminder that while high quality democracy may promote better governance over time, this cannot be taken for granted. Governments at all levels of political transformation can improve their ability to set and implement policy, and tackle corruption.

Countries on the up

In most of the countries experiencing an improvement in governance, new leaders introduced reforms that improved their country's performance by a considerable – although rarely transformative – degree.

The biggest gain between 2018 and 2020 occurred in Ethiopia, where Prime Minister Abiy sought to strike a different note to his predecessors, promising to open up the country's previously tightly guarded banks and finance sector to investors. He also surprised many commentators – and many Ethiopians – by moving to arrest a number of high-ranking military officers who stood accused of corruption and human rights abuses. At the same time, Abiy's willingness to free political detainees including opposition leader Andargachew Tsege, to accept the ruling of a 2002 border commission and give disputed territory to Eritrea, and subsequently to bring the conflict with Eritrea to a close, demonstrated a newfound willingness to build consensus both domestically and internationally. While the pace of change slowed towards the end of his first year in power, Abiy's actions led to an improvement in Ethiopia's quality of governance score from 3.65 to 4.96, a sizeable increase of 1.31 – though as already noted, popular confidence in his reform credentials subsequently declined significantly.

Zimbabwe also experienced a significant improvement in governance under a new leader (+0.82), with a greater focus on rationalizing economic management, stabilizing the currency situation, and strengthening relationships with important international actors such as the International Monetary Fund – whose support is likely to be critical to long-term economic recovery. However, as with economic performance, the government does not appear to be able to deliver on its early promises. In the face of mounting opposition protests against the political situation and civil society protests against the economic situation and the abuse of human rights, the ZANU-PF government has increasingly sought to scapegoat its domestic rivals and international critics rather than actually tackling the structural barriers to economic growth. For example, by early 2019 the Mnangagwa government had already moved away from the initial rhetoric of the reform agenda and began accusing Western governments of seeking to undermine the country's economy and orchestrate "regime change", effectively reverting to a Mugabe-era strategy. Some of these shifts came too late to be included in BTI 2020, and therefore did not undermine the governance score. They are important to report here, however, because they suggest that these gains are highly unlikely to be sustained into the next round of the BTI.

Leadership change also facilitated an improvement in governance in Angola, despite little change in the overall quality of democracy. The replacement of José Eduardo dos Santos as president by João Lourenço in 2017 did not initially lead to great optimism, as Lourenço was both a former army general and a handpicked loyalist. However, within weeks of his inauguration, Lourenço used the vast powers given to under the 2010 constitution to denounce corruption and remove some of dos Santos' allies from their positions. In turn, this has led to stronger relations with international financial institutions and an improvement in the country's governance rating from 3.60 to 4.23, an increase of 0.63.

Mozambique followed a similar pathway, in that the changes described here followed the accession of Filipe Jacinto Nyusi to the presidency in 2015. Although the country experienced a relatively small change overall (0.16), an improvement in five of the 14 governance indicators was sufficient for it to be reclassified as having moderate rather than weak governance. Key changes included evidence of greater commitment to move against corruption at all levels of the political system through the Gabinete Central de Combate à Corrupção (GCCC) since the end of 2018. There has also been valuable progress in terms of the ability of civil society groups to participate in economic and political decisions, and greater efforts to build consensus following a period of growing tensions between the Mozambique Liberation Front (FRELIMO) government and the Mozambican National Resistance (RENAMO) opposition, which had threatened to return the country to civil war.

Leadership change also led to an improvement in governance in Benin (+0.22), where President Thomas Boni Yayi stood down in 2016 having completed the constitutional limit of two terms in power, and was replaced by Patrice Talon. This is largely because Talon's drive to use the experience that he had accumulated as a successful businessman to reform key sectors of the economy such as agriculture suggests that the new government has greater capacity to prioritize and implement its policy agenda. However, as with so many of the other changes reported here, the picture in Benin is somewhat mixed. In the governance sphere, critics suspect that allies and associates of President Talon – and possibly the president himself – has been able to benefit disproportionately from the privatization programme that he has pursued, while petty corruption and bureaucratic blockages continue to slow the pace of reform. At the same time, the parliamentary elections of April 2019, in which opposition parties were prevented from standing as a result of procedural obstacles that were put in their way, undermined President Talon's claims to be committed to deepening democracy and transparency.

These contradictory trends mean that while Benin recorded an improvement in its governance, it recorded a decline in the overall quality of democracy (-0.10). This suggests that there is a real risk that Talon's reforms will ultimately be undermined by a combination of corruption and political controversy.

Countries on the slide

Three West African states (Liberia, Niger, and Nigeria) and one Central African state (Republic of Congo) were reclassified downwards between BTI 2018 and BTI 2020. In the case of the Republic of Congo, this resulted from a very small decline of -0.07, which was sufficient to move the country below the threshold for being considered "weak", but should not be taken to imply a dramatic change in the quality of governance. The changes in West Africa have been more significant.

In Liberia, the deterioration in economic performance described in the previous section was underpinned by a fall in the quality of governance to -0.49. There were three main reasons for this decline. First, the government's determination to improve and implement key policies such as anti-corruption measures fell during the second term of Ellen Johnson Sirleaf, and this continued into the Weah administration. Despite only having been in power for two years, key integrity institutions have been weakened and there have already been a number of accusations that figures close to the president are personally benefitting from his policies. Second, and relatedly, the Weah government has demonstrated a lack of experience and internal political coherence. Partly as a result, his cabinet failed to hit the ground running, taking over a year to develop its five-year development plan, the "Pro-poor Agenda for Prosperity and Development" (PAPD), leading to lower scores for policy coordination.

Finally, the scramble for positions the followed Weah's election resulted in the promotion of many of his allies to prominent positions, even in some cases in which they had dubious qualifications, weakening the capacity and competence of the state. At the same time, the growing role played by Weah's financial backers crowded out civil society groups in some areas, which in turn undermined on efforts to use a multi-stakeholder governance model to ensure transparency and accountability in the management of the agriculture, forestry, oil and mining. In turn, the weakening of transparency and integrity mechanisms is likely to facilitate greater economic and political abuses in future.

Niger also experienced a disappointing decline in the quality of governance – the largest single drop of any country in the BTI's Africa sample (-0.61). As in Liberia during Johnson Sirleaf's second term, this reflected the declining commitment of the sitting government to key reforms during its second stint in office. During the first term of President Mahamadou Issoufou (2011-2016), his administration prioritized poverty reduction strategies, nutrition programs, and the greater integration of the North of the country. However, the government's focus began to drift thereafter, while a growing emphasis on the importance of winning the war against Boko Haram and other insurgencies has meant that the government has become increasingly narrow and short-term in its approach. Although the president did outline a new plan for economic and social development (2017-2021), this tended to place a greater emphasis on security than sustainable growth and poverty reduction. One reason for the securitization of development is that there is considerably more international financial assistance available to deal with the threat of radical insurgencies than there is to build effective public services. For example, while five Sahalian states formed the Group of Five (G5) for the Sahel in order to strengthen regional cooperation in efforts to promote security and development, international actors such as France and the United States have tended to focus – and direct funding towards – security projects such as the creation of a Joint Force (Force Conjointe du G5 Sahel or FC-G5).

The malaise that this has generated is well illustrated by the fact that in the period under review President Issoufou failed to outline any programs that really seek to alleviate the structural constraints that combine to keep his country poor and insecure. Most notably, the government continues to be a long way from achieving any of the Millennium Development Goals, and while it is rhetorically committed to the Sustainable Development Goals it has yet to outline any concrete plans for how they can be met. This is unfortunate, as the response of donors to the "migrant crisis" – and in particular the efforts of European governments to stem the flow of people from countries such as Niger by supporting projects that are designed to boost "community resilience" – has made new resources available. To date, however, the government has not played a prominent role in coordinating these efforts or ensuring that they contribute to a coherent and integrated approach to development. Instead, there is some evidence that the expansion of donor activity in this area has encouraged the government to pull back, becoming less responsive to the needs of its own people.

A number of other states were not recategorized downwards but nonetheless saw a significant deterioration in the quality of governance, including Tanzania and Zambia. In both cases, this reflected the uncompromising strategy adopted by an intransigent president, although the context in which this occurred was very different in each country. As discussed above, President Lungu has been struggling to assert his legitimacy and authority in Zambia since he became the presidential candidate of the Patriotic Front ruling party in controversial circumstances in November 2014. Anticipating an uphill battle to retain power in 2021 – given how close previous elections have been and the country's economic difficulties – Lungu has set about retaining control through a combination of marginalizing opposition, eroding the independence of key governance institutions, and unsustainable public spending. In turn, the failure to agree a much needed $1.2 billion recovery package with the International Monetary Fund has undermined the prospects of effectively managing the country's growing debt burden. As a result of declining scores for international cooperation and consensus-building, Zambia's overall governance rating fell from 5.06 to 4.48, a fall of 0.58.

The trend in Tanzania has been similar, although the reasons for it have been very different. President John Magufuli was elected in 2015 as the leader of Chama Cha Mapinduzi (CCM), the ruling party since independence. He was initially lauded for his direct and down-to-earth style, sweeping the streets and promising to wide out corruption. But as time has gone on, concerns have grown about the way in which the new president's populist stylings and determination to force through change have undermined consensus-building. While opposition parties have been intimidated – with public rallies banned – and critical journalists have been arrested, Magufuli's aggressive stance towards international donors and investors has led to a significant drop in Foreign Direct Investment. meanwhile, avoiding many of the international meetings attended by his predecessors – ostensibly on the basis he wanted to cut down on government spending – has also led some critics to describe his foreign policy as isolationist. Taken together, these developments have hurt the country's score on both resource efficiency and consensus-building, resulting in an overall decline in quality of governance from 5.07 to 4.47, a decline of 0.60.

Regional variations

The regional pattern when it comes to the quality of governance closely resembles that for democracy: Southern and West Africa are rated as the best performing regions, with Eastern and Central Africa lagging some way behind (figure 6). There are some important differences, however. The gap between Southern/West Africa and Eastern/Central Africa is also considerably smaller when it comes to governance than democracy. This suggests that while democracy tends to promote accountable and responsive government and so facilitates better governance, some democracies fail to deliver while a number of authoritarian regimes provide reasonable levels of governance despite the absence of effective checks and balances on the abuse of power.

As with the quality of democracy, the trend over the last two rounds of the BTI has been for the quality of governance to improve in Southern Africa but deteriorate slightly in West Africa (figure 7). In addition to the deterioration already noted in Liberia and Niger, this was driven by events in Nigeria where a small improvement in the quality of democracy went hand in hand with a significant decline in the quality of governance (-0.55). This reflects the difficulty that President Buhari's government has had in performing key tasks – such as the appointment of the cabinet and setting of economic policy – quickly and efficiently. Despite efforts to curb corruption and stabilize the economy, the strategic priorities set by the government have regularly shifted as a result of short-term pressures, most notably the security challenges posed by Boko Haram in the north and growing secessionist sentiment in the south-east. The campaign to re-elect the president in the 2019 general elections also deflected the government's attention from the country's pressing socio-economic challenges.

Figure 6. Quality of governance in Africa, by region

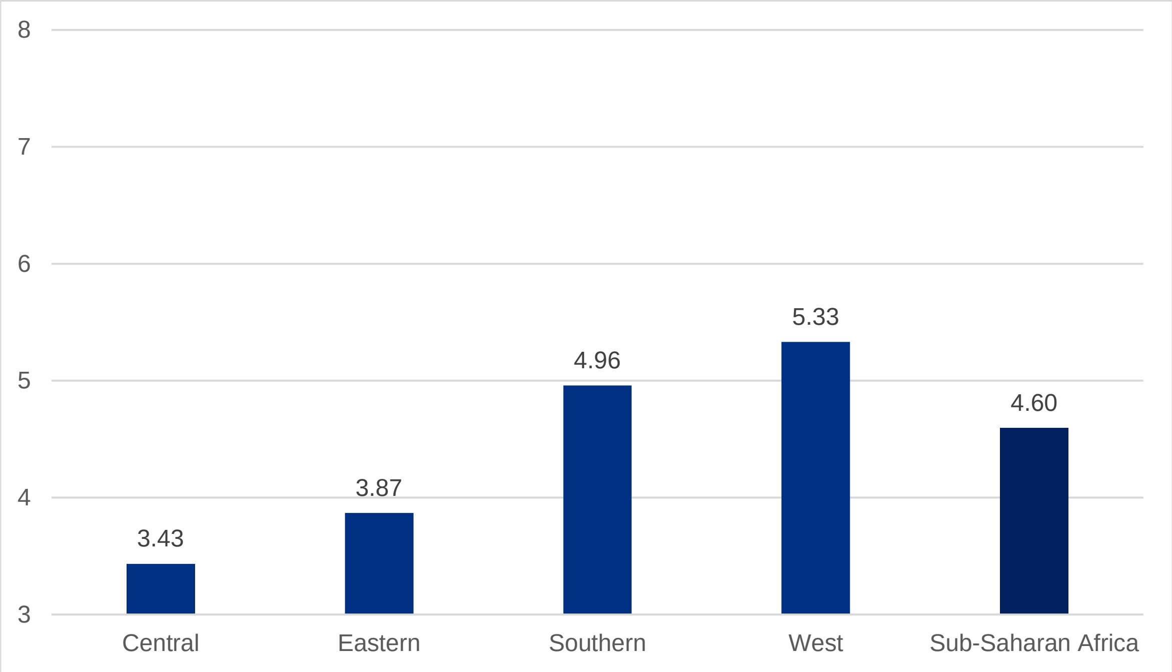
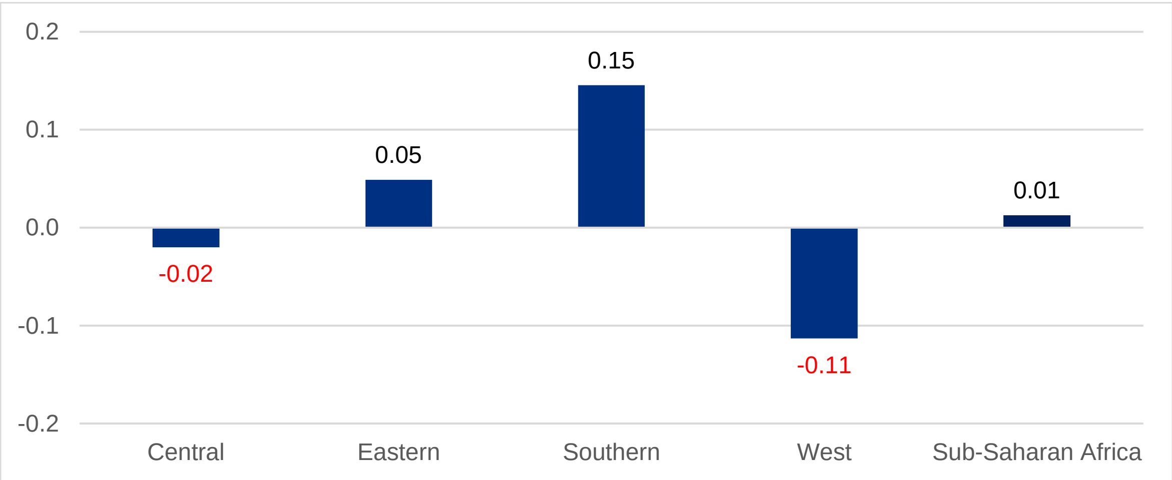


Figure 7. Governance trend in Africa, BTI 2018-2020, by region



Along with the challenge of ensuring that national policy priorities are implemented at both the federal and state level, these factors led to a deterioration in the country's scores for policy implementation and efficient use of its natural resources. Meanwhile the president's heavy handed approach to dealing with the re-emergence of support for an independent Biafran state – as discussed above – resulted in a more critical evaluation of its conflict management strategy. Taken together, these developments reveal a government that lacks the flexibility and quick feet needed to manage simultaneous economic and security challenges.

It is too early to say whether the recent trend in West Africa is indicative of a more fundamental change of direction that will lead to a greater convergence between the different regions. It is important to note, however, that none of the changes between BTI 2018 and 2020 are particularly large, which suggests that regional differences in the quality of governance will not be eroded in the near future.

Outlook

The main variations and trends identified in this report – such as the greater progress towards democratic consolidation and good governance in West and Southern Africa as compared to East and Central Africa – are likely to continue in the near future. While a number of countries remain vulnerable to rapid political change, most notably those in which weak states face continued insurgencies and the threat of civil conflict – including the Central African Republic, Mali, and Niger – in general change is likely to be gradual and to continue to be shaped by the key drivers discussed in this report.

West and Southern African states will benefit from being in comparatively favorable neighborhoods, complete with regional organization that have demonstrated a willingness to intervene to prevent authoritarian abuses – at least in some cases. In turn, this will encourage further democratization, or at the very least discourage democratic reversals. By contrast, East and Central African states operate in much less favorable neighborhoods that facilitate autocratization. While the relatively stable authoritarian states of East Africa have no interest in fostering democracy, the conflict-prone states of Central Africa pose political and economic risks to one another. Domestic politics will of course complicate this picture, and has consistently been shown to be more significant than international factors where long-term democratization is concerned, but is unlikely to do so in a way that reverses the trends of the last decade.

In East Africa, the domestic political outlook suggests there will be further threats to political rights and civil liberties. Eritrea, Somalia and South Sudan are likely to remain either too closed or too unstable for significant democratic gains to be realized. At the same time, authoritarian leaders in Burundi, Djibouti, Rwanda and Uganda have established themselves as presidents for life and can be expected to respond to any challenge to their authority with repression, resulting in either continuity or, where a stronger opposition challenges emerges – as appears to be happening in Uganda – a further deterioration in political transformation. At present, Tanzania is considerably more politically competitive than this group of states, but President Magufuli has already established a track record of being unwilling to accept criticism and intimidating opposition parties and civil society groups. It therefore seems likely that the build-up to the 2022 elections will see further infringements on civil liberties, undermining consensus and increasing the potential for high profile criticism from the international community.

There is also a significant risk of democratic backsliding elsewhere in East Africa. While Kenya is currently politically stable as a result of the “handshake” between President Uhuru Kenyatta and long-time opposition leader Raila Odinga – which ended the political impasse following the 2017 elections crisis – political tensions will rise ahead of the 2022 elections. In particular, competition to succeed Kenyatta when he stands down having served two terms in office threatens to split the government in two. If Deputy President William Ruto is not selected as the ruling party’s presidential candidate, something which Kenyatta initially promised but which his allies are seeking to block, he will leave the party to form a rival alliance. This would represent a significant risk to national unity, as the coalition between Kenyatta, a Kikuyu, and Ruto, a Kalenjin, has helped to maintain an uneasy peace between two of the communities that experienced the worst violence during the post-election crisis of 2007/8. The country therefore faces a growing risk of both inter-ethnic tension and the heavy-handed use of the security forces as the government seeks to maintain control.

Against this gloomy backdrop, Ethiopia offers a ray of hope following recent political openings. However, continued instability in parts of the country, and the threat of localized coups and insurrections, mean that Prime Minister Abiy faces a major challenge to simultaneously maintain political stability and push his reform agenda forwards. General elections scheduled for May 2020 will present a major test of the government’s new direction, especially given the compressed timeframe to deliver more credible polls. In the absence of the necessary time to make wholesale institutional changes, much will depend on Abiy’s charisma and nous, and his capacity to retain the confidence of both the opposition and the different factions of the ruling Ethiopian People's Revolutionary Democratic Front (EPRDF).

The situation is considerably more promising in Southern Africa, in part because the region already boasts a number of relatively stable democratic states. We are unlikely to see significant change in Mauritius and Namibia, while South Africa has the potential for democratic renewal now that Jacob Zuma has been replaced as president by Cyril Ramaphosa. However, the next two years will witness a significant test of the region’s democratic credentials where other countries are concerned. Malawi spent much of 2019 holding general elections and then debating the outcome. Following sustained street protests, first the Constitutional Court and second the Supreme Court ruled that the victory of President Peter Arthur Mutharika had been flawed. These proceedings led to a “fresh” (re-run) presidential election held in June 2020 that was won by the opposition, creating the opportunity for more systematic political change – a possibility that will be reviewed in the next BTI report.

In Botswana, one of the continent’s oldest democracies, the dominance of the Botswana Democratic Party (BDP) – which has ruled the country since independence – is less certain. The general elections in October 2019, which were among the most fiercely contested in the country's history, provided a foretaste of future political contests. The former BDP leader and President Ian Khama had quit the party in May 2019 and pledged that he would use all of his resources to ensure that the BDP would be defeated in the elections. Khama was angered that his handpicked successor, President Mokgweetsi Masisi, had refused to comply with his wishes. However, the fragmented opposition was comfortably beaten by President Masisi, whose populist promises of salary increases for civil servants and job creation in the electric car industry caught the popular imagination and handed his BDP an even higher vote share than in 2014. Nevertheless, the intensity of the campaign in 2019 raise serious questions about whether Botswana is entering a new phase of more fractious politics, and how the ruling party would respond to the prospect of losing power.

Elections are also likely to generate fresh tensions in Zambia as the country prepares for polls in 2021. The presidential race is set to be extremely close, as it was in 2016, especially given the poor state of the economy and mounting public dissatisfaction with the Patriotic Front (PF) government. As in Tanzania, President Lungu has demonstrated a growing intolerance of dissent and is likely to resort to greater use of repression if it looks like he is heading for defeat. Moreover, his government’s determination to force through controversial constitutional amendments – which critics allege would undermine the independence and impartiality of the judiciary – will further erode democratic checks and balances.

Improvements in government performance are more likely to occur in countries that have recently experienced leadership changes, but even in these cases there are good reasons to be cautious. In both Angola and Zimbabwe, for example, it remains unclear just how much economic and political reform will result from recent political transitions. Although hopes were initially higher in Zimbabwe following the overthrow of Robert Mugabe, it was in Angola that President Lourenço's anti-corruption drive had the biggest impact on governance scores. However, there are significant causes for concern in both countries. In Angola, it is unclear whether Lourenço is genuinely committed to reform or is simply determined to replace the corrupt personalist networks that underpinned the dos Santos regime with those of his own. In Zimbabwe, the government has consistently repressed popular protests while failing to effectively address alleged human rights violations by members of the security forces, suggesting that Mnangagwa's regime rests on very similar foundations to Mugabe's. Popular aspirations for more fundamental political and economic transformation may therefore be disappointed in both countries.

West Africa is also likely to witness more continuity than change. Despite this, popular perceptions of the ability of the region to establish stable democracies could be shaken if the recent trend of authoritarian abuses in Benin and Senegal, and rising corruption in Liberia, continues. Both Benin and Senegal have established strong democratic traditions, with multiparty politics in Senegal stretching back to the 1970s, when most African states were under one-party or military rule, and are widely seen to be leading the way in terms of political rights and civil liberties. However, the ability of presidents to manipulate elections in their favor by preventing opposition candidates and parties from standing has demonstrated the weakness of democratic institutions and the extent to which democracy depends on elite compliance in the absence of a strong civil society.

Much as in the United States under President Donald Trump, the election of leaders willing to break with established conventions has demonstrated that many of the assumed "rules of the game" were not formal checks and balances that were stone and binding but were rather informal norms regarding how power should be exercised. The risk in both countries is therefore that the long periods of plural and peaceful politics that they have enjoyed has generated an unwarranted sense of complacency that these political systems will be self-correcting. Instead, the re-assertion of the primacy of democratic norms and values will require effective coalitions to be formed between civil society groups, opposition parties, regional bodies and members of the international community to both strengthen the independence of key institutions and increase the costs of subverting them. Democracy can never be assumed – it must always be fought for.

Given its size and geo-strategic significance, overall trends in West Africa will also be strongly shaped by what happens in Nigeria. As things stand, there is little evidence that the country will make major strides towards reform under President Buhari – instead the current combination of gradual economic progress and bouts of excessive intervention by the security forces to deal with popular discontent is set to continue. One of the main challenges facing the government will be to establish and maintain a clear focus on policy priorities, especially given that Buhari is now in his second and final term and the succession battle to replace him has already begun. The country's longer-term prospects will be heavily shaped by how the succession process plays out, and whether the next elections will be seen to be free and fair. In the light of opposition complaints about the 2019 polls, the government's ability to simultaneously deal with Boko Haram, the Niger Delta insurgencies, and rising discontent in "Biafra", will be undermined if the succession process saddles the ruling party with an unpopular leader who is only able to win by holding poor quality polls.

Elsewhere, ongoing insurgencies threaten political stability in Cameroon and Mali, while the legitimacy of the state remains weak in a number of countries including Mauritania and Guinea. It is in these states that rapid political change is most likely to occur in West Africa, as weak governments facing major governance challenges struggle to assert their authority. As we saw in Mali in 2012, the sitting government can be extremely vulnerable to both insurgencies and coups when political parties have relatively weak roots in society and the political system has failed to deliver security and development. It is therefore feasible that the next few years will see relative stability in most states go hand-in-hand with the collapse of regimes in countries where governance is already rated as “weak” or “failed”.

Central Africa and the Sahel region have perhaps the greatest potential for this kind of political volatility. Conflict continues to be a major challenge in both the Central African Republic and Chad, while the government in Burkina Faso is still struggling to deal with the twin challenges of insecurity and poverty. As noted above, the creation of the G5, along with FC-G5 – its joint force – in 2017, has raised hopes that a more effective regional response will emerge, funded by international backers such as the United States and, through different modalities, the French. However, if foreign powers are not careful there is a risk that their tendency to focus on prioritize security concerns will lead to a short-termist approach being taken to the socio-economic development challenges facing countries in the Sahel. In the long-term, this is likely to not only to undermine the prospects for genuine economic transformation – which will require deep-rooted and structural changes that will take many years to complete – but also to alleviate the poverty and inequality that foster anti-system sentiment and movements.

In the absence of an effective regional body, the tendency for conflicts to split across borders remains a serious source of concern. The most significant country from this point of view is the Democratic Republic of Congo, which has the capacity to negatively impact on its neighbors both in terms of the flow of refugees resulting from health crises and insecurity, and in terms of the way that nearby states have historically been sucked into conflicts on Congolese soil in search of valuable natural resources. Against this backdrop, it is particularly worrying that the DRC is currently struggling to contain the world’s second largest Ebola epidemic on record, which has already claimed over 2,000 lives. Failure to effectively contain and end the outbreak, which is located in the in the North Kivu, South Kivu and Ituri provinces, would lead to a severe health crisis that would have dramatic economic and political consequences for both the DRC and the wider region.

The political stability of the DRC will also depend on how the political alliance between current President Felix Tshisekedi and former President Joseph Kabila plays out. At present, relations appears to be cordial, in large part because Tshisekedi has kept his side of the deal, allowing his predecessor to wield considerable power from the shadows. The cabinet announced in August 2019, for example, was dominated by Kabila’s Common Front for Congo (FCC), which took the most significant positions, with Tshisekedi's CACH coalition limited to less high-profile posts. However, on occasion Tshisekedi has also sought to flex his own muscles, rejecting Kabila’s first choice candidate for Prime Minister, Albert Yuma – the boss of Gécamines’ – and speaking of the need to “unblock the dictatorial system that was in place”. If Tshisekedi long-term goal is to gradually outmaneuver Kabila until the point that he can assert his independence, the country is likely to witness a prolonged power struggle with the potential to further destabilize the government.

The one obvious reason for Tshisekedi to refrain from this course of action is that he remains dependent on Kabila to exercise authority. At present, Kabila enjoys a strong majority in both the

National and Provincial Assemblies and so has the capacity to effectively veto Tshisekedi's policy agenda should he wish. Until the new president is able to gain greater control over the legislature this reality, along with Kabila's powerful political and business networks, mean that any attempt to completely ditch the former leader would be extremely risky. In turn, this suggests that future legislative elections will be particularly fiercely contested given their significance to the balance of power between the two leaders, and hence to who is able to determine the country's destiny.

Taken together, the different trajectories of African states across the four regions covered by the BTI suggest that in many cases democratic gains and losses are likely to cancel one another out, much as they did in 2017-2019.

Address | Contact

Bertelsmann Stiftung
Carl-Bertelsmann-Str. 256
33311 Gütersloh, Germany
Phone +49 5241 81-0

Robert Schwarz
Senior Project Manager
Phone +49 5241 8181 402
robert.schwarz@bertelsmann-stiftung.de

www.bertelsmann-stiftung.de/en

| BertelsmannStiftung