



BTI 2018

A Divided Continent

Regional Report Africa

Nic Cheeseman

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By Nic Cheeseman

Overview of transition processes in Algeria, Angola, Benin, Botswana, Burkina Faso, Burundi, Cameroon, the Central African Republic, Chad, the Democratic Republic of the Congo, Republic of the Congo, Côte d'Ivoire, Egypt, Eritrea, Ethiopia, Ghana, Guinea, Kenya, Lesotho, Liberia, Libya, Madagascar, Malawi, Mali, Mauritania, Mauritius, Morocco, Mozambique, Namibia, Niger, Nigeria, Rwanda, Senegal, Sierra Leone, Somalia, South Africa, South Sudan, Sudan, Tanzania, Togo, Tunisia, Uganda, Zambia and Zimbabwe.

This regional report analyzes the results of the Bertelsmann Transformation Index (BTI) 2018 in the review period from 1 February 2015 to 31 January 2017.

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Executive Summary

Between 2015 and 2017 Africa witnessed an overall deterioration in the quality of political and economic transformation and governance. The magnitude of these changes was small, suggesting democratic difficulties rather than democratic collapse, but it is striking that every criterion of democracy – bar “political and social integration” – recorded a decline. The same was true of every measure of economic status and governance. The combined effect of these trends was to move the continent further away from political stability, democratization, and economic sustainability.

Africa’s stalled democratic progress is rooted in partial transitions from authoritarian rule experienced by many countries. While almost all African states hold multiparty elections that create the outward appearance of democracy, in many cases constitutions continue to confer disproportionate power on the president and ruling party. The last few years has also seen the continuation of a decade long trend of democratic backsliding, with governments in countries such as Burundi and Uganda deploying repression to deal with the challenges posed by the spread of social media and the emergence of increasingly assertive civil society groups and opposition parties.

Economic transformation also stalled during this period. Following the optimism of the “Africa rising” years, a combination of falling demand for commodity prices, the failure of many states to diversify their economies, and ongoing political instability in countries such as Nigeria led to lower than projected economic growth between 2015 and 2017. In turn, falling revenue placed significant pressure on government budgets, and thus constrained the policy levers available to many – but not all – leaders. Along with rising currency and price instability and the growing percentage of GDP that African states spend on servicing an increasingly heavy debt burden – especially Egypt, Eritrea, Mozambique, and Mauritania – this led to a deterioration in the standard of living.

The combined effect of these economic and political trends – most notably continued instability, a failure to reduce corruption and waste, and a lack of consensus and government legitimacy – contributed to a decline in the quality of governance in a number of states. In Tanzania, Zambia and Zimbabwe, this was compounded by the rise of economic nationalism, which limited opportunities to take advantage of international co-operation. More broadly, slow progress towards regional integration constrained the potential to increase economic growth by expanding demand.

However, it is essential to also look beyond regional averages because they mask a remarkably divided continent. At the sub-regional level, West and Southern Africa consistently perform better than East, Central and North Africa when it comes to the quality of both democracy and governance. Pronounced variations are also apparent when at the level of individual countries. While many of the continent’s more authoritarian governments have become even more repressive and entrenched, a number of aspiring democracies are holding their own. Similarly, the high and consistent economic growth achieved by Mauritius and Rwanda means that leaders in these states have been able to take greater control of their economic destiny at the same time as governments struggling with civil war and unsustainable debt have watched their available policy options shrink. As a result, Africa is deeply polarized between political and economic extremes – and there is little evidence that the continent will converge on a common ground in the foreseeable future.

Introduction

Africa is one of the world's most polarized political region. Half of all African states are autocracies (36% hardline, 14% moderate), while the other half are democracies (5% consolidating, 34% defective, 11% highly defective). Between 2015 and 2017, this situation became even more stark: on the whole, the continent's autocratic countries have become more repressive, while its more democratic states have seen relatively little change. In other words, far from converging on a common experience it appears that the countries of Africa are becoming increasingly divergent. If current trends continue, the continent's future will be characterized by a set of entrenched authoritarian states sitting side by side with a set of nascent democracies. To understand this complex reality, it is essential to consider the political and economic transformations that the continent has undergone over the last thirty years.

In the early 1990s, sub-Saharan Africa underwent the most significant political transformation in its recent history as the military regimes and one-party states that characterized the 1980s gave way to multi-party politics. Similar pressures existed in North Africa in the 1990s, though liberalization was only cosmetic during this period (Lust 2011). There were three main drivers of the continent's "second liberation" (Cheeseman 2015). First, a long-term process of economic decline, which both made it difficult for governments to create the jobs and opportunities necessary to satisfy their populations and rendered African states increasingly dependent on loans from the International Monetary Fund and the World Bank. Second, growing domestic pressure for reform, fueled by both economic decline and generational change – the formative political experience of the young people who joined pro-democracy movements was not the anti-colonial struggle but the political stagnation that followed it. Third, the greater willingness of international partners – empowered as a result of their control over access to much needed international financial assistance – to engage in democracy promotion following the end of the Cold War and the collapse of the Soviet Union.

Taken together, these changes weakened the position of authoritarian leaders and created windows of opportunity for democratic reform. However, these trends did not play out equally strongly across the continent, and African leaders reacted very differently to the new political pressures that they faced. In Benin and Zambia, presidents unwilling to keep power through force accepted defeat when their cash-strapped governments were soundly defeated by resurgent opposition movements. In Namibia and South Africa, the African nationalist governments that took over after the end of white minority rule proved willing to govern in ways that were both inclusive and progressive. And in Botswana and Mauritius – the only two countries on the continent to have held uninterrupted multiparty elections since independence – political leaders continued to govern responsibly, respecting both freedom of speech and property rights. These success stories are particularly remarkable because they occurred in states that often lacked many of the factors that political scientists tend to argue are beneficial for democratic consolidation, such as a vibrant pluralist and cohesive society and control over the forces of coercion (Dahl 1998), and national wealth and strong state capacity (Cheibub et al 1996).

However, in a much larger set of countries those in power were able to leverage their natural resources, geo-strategic locations, and the advantages of incumbency to win elections that were rarely free or fair (Adejomobi 2000). In particular, censorship of the media, the intimidation of civil society groups, the absence of impartial electoral commissions and use of the security forces for political ends undermined the potential for new forms of accountability to emerge (Cheeseman and Klaas 2018). Indeed, during the 1990s respect for civil liberties declined at the same time as the quality of

political rights improved. Thus, for many citizens the 1990s saw the rise of “elections without change”. This was the case in Cameroon, Chad and Togo, where corrupt and often nepotistic relationships with figures in the French government – known as *Françafrique* – insulated authoritarian leaders from international criticism. It was also the case in many of the continent’s resource rich states, such as Angola, Equatorial Guinea and Libya, which were able to leverage their financial muscle to sustain governments that were highly repressive and corrupt (Ross 2001). A similar phenomenon of thwarted elections also occurred in Algeria, when military efforts to prevent the victory of the Islamic Salvation Front (FIS) in multiparty polls held in December 1991 led to a coup that in turn triggered a civil war.

The emergence of so many “competitive-authoritarian” regimes meant that the continent’s democratic gains rested on shaky foundations (Levitsky and Way 2002). This was less apparent in the early 2000s, especially as an increasing number of countries experienced a transfer of power, including Ghana and Kenya. However, from the mid-2000s onwards the continent experienced a period of democratic backsliding (when genuinely democratic institutions are weakened and eroded) and authoritarian retrenchment (when states that were already largely authoritarian become more repressive), as ruling parties sought to minimize the threat posed by increasingly assertive opposition parties and civil society groups. This led to a decade long democratic recession that was characterized by the removal of presidential term-limits, poor quality elections, and the introduction of legislation that enabled the government to exert greater control over social media and non-governmental organizations (Rakner 2018). The continued liberalization of a number of more open and democratic states such as Ghana, Namibia and Senegal, along with the increasingly authoritarian approach of governments in Cameroon, Egypt, Morocco and Zimbabwe, resulted in a growing polarization between two very different types of political system.

As a result, the introduction of multiparty politics often proved insufficient to generate broader political transformation. This has had profound implications for both governance and economic reform. Many countries did change their economic policy in the 1990s, abandoning some of the more protectionist policies of the past and undergoing privatization programs at the behest of the International Monetary Fund and the World Bank (Pitcher & Teodoro 2018). The need to maintain the popularity of the government also inspired a fresh round of investment in free primary education, even in some of the continent’s more authoritarian states (Harding & Stasavage 2013). At the same time, the combination of rising commodity prices and better economic management in both politically competitive countries such as Kenya, and “developmental authoritarian” states such as Egypt, Ethiopia and Rwanda (Kelsall 2011), led to stronger economic growth. In turn, this inspired the emergence of the “Africa Rising” narrative in the 2000s, when the continent’s young population, and comparatively strong performance during a period of global economic slowdown, led to the belief that the continent was well placed for a period of rapid economic development.

In reality, the rate of economic transformation was constrained by the fact that many of the political dynamics that had undermined economic growth in the 1980s remained in place. Limited progress has been made towards regional economic integration, despite the rhetorical commitment of many leaders to Pan-Africanism. High levels of corruption continue to result in considerable waste and inefficiency in many countries (Gyimah-Brempong 2002), in part because governments do not fear that they will be punished for it at the ballot box. At the same time, the tendency to mobilize voters along ethnic (or regional, or religious) lines, combined with winner-takes-all electoral competition, has limited the provision of public goods (Miguel 2004). Taken together, these challenges have undermined the willingness and capacity of governments to overcome the “center-periphery” divide in

state capacity inherited from colonial rule. As a result, the effectiveness of most – though by no means all – African states tends to decline the further away one moves from the capital city. Along with a lack of investment to diversify economies away from a reliance on the export of natural resources, these structural weaknesses render the continent particularly vulnerable to external shocks. Consequently, the sustainability of the continent’s political and economic growth remains the subject of intense debate.

North Africa has followed a very different trajectory. The “third wave” of democracy that led to the reintroduction of multiparty politics across sub-Saharan Africa had little impact when it washed up on the southern shores of the Mediterranean Sea, and countries such as Egypt and Libya remained closed authoritarian systems until the Arab Spring almost two decades later. The durability of authoritarianism in North Africa had a number of roots, including natural resource wealth – most notably in Algeria, Egypt and Libya – and the development of stronger states with a greater capacity to maintain political control through repression (King 2009). Another significant factor has been the perceived threat posed by the spread of Islam in many of these countries, which both enabled secular autocracies to depict their rule as necessary to prevent the takeover of Islamist forces, and deterred Western powers from pushing for competitive elections (Lust 2011). However, while the North African experience has been distinctive, the legacy of the political uprisings that toppled authoritarian leaders in Egypt, Libya, and Tunisia in 2011 has seen greater convergence between North and sub-Saharan Africa. On the one hand, episodes of political instability and conflict have undermined state capacity and economic growth in Egypt and Libya, much as they have done in countries such as the Central African Republic, Somalia, and South Sudan. On the other hand, the survival of authoritarian elements and the central role played by the security forces in Algeria and Egypt means that, much like many post-conflict African states, one of the most serious challenges facing these countries is how to send the military back to barracks and entrench civilian rule (Dwyer 2018).

Another recent challenge that is common to countries in both sub-Saharan and North Africa is the spread of radical religious movements. The difficulty here is twofold: first, damaging terrorist attacks may undermine support for democratic governments; second, authoritarian states may be able to use the threat of mounting insecurity to justify the use of greater repression. In Nigeria, for example, the failure to deal with the spread of Boko Haram undermined the credibility of President Goodluck Jonathan’s government. Meanwhile, the rise of jihadist groups such as the Group for the Support of Islam and Muslims (JNIM) in the Sahel has encouraged regional and international interventions in the area to focus on security concerns at the expense of initiatives to promote development and respect for human rights (Bertand and Cheeseman 2019).

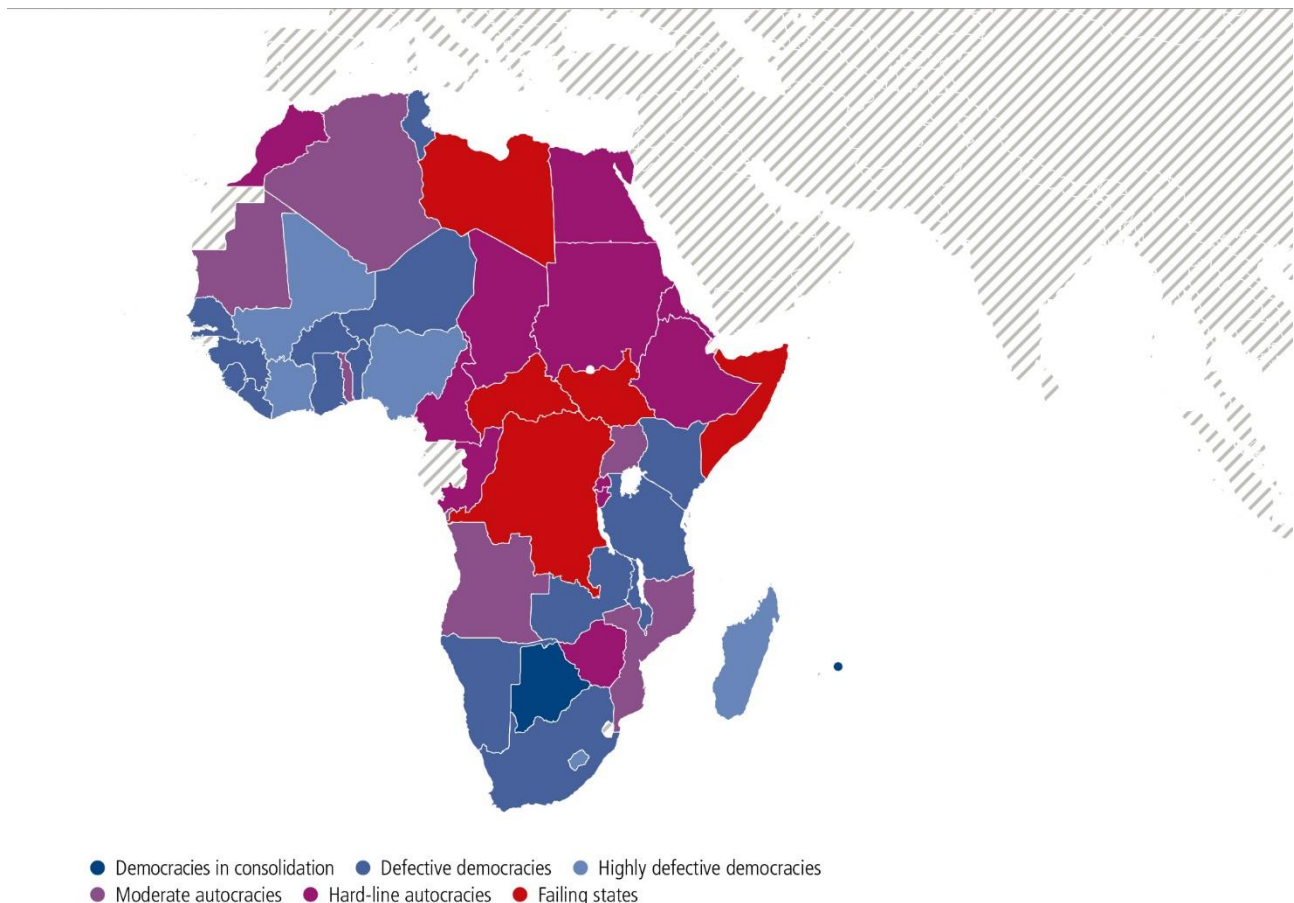
However, there are also a number of positive trends worth noting that have the potential to re-energize the democratic project. One of the few generalizations that holds true for most African states is that urban voters and younger voters are more likely to be [critical of the ruling party](#), and more willing to vote for alternatives, than their older and more rural counterparts. This helps to explain why so many authoritarian governments have fallen back on retaining control by dominating the vote in the countryside, where it is easier to control the information available to citizens and greater authority can be exerted through traditional leaders. It is therefore of great significance that African populations are growing younger at the same time as they are becoming increasingly urbanized. Most notably, all of the youngest ten countries in the world by median age are located on the continent, while current projections suggest that for the first time [a majority of Africans will live in towns and cities](#) within the next twenty years.

The impact of these changes will be profound, but – reflecting the main theme of this report – it will not be uniform (Cheeseman and Fisher 2019). Greater pressure on the ruling party in countries like Chad and Uganda, where the security forces are often used to settle political disagreements, may trigger fresh conflict and a recourse to increasingly authoritarian strategies – at least in the short term. By contrast, in more pluralist contexts with a recent history of greater political tolerance, such as Botswana and Namibia, the spread of towns and cities is likely to give rise to increasingly competitive elections and, over time, democratic strengthening. As a result, these demographic changes are likely to further reinforce the divergent trends that have emerged over the last decade.

Political Transformation

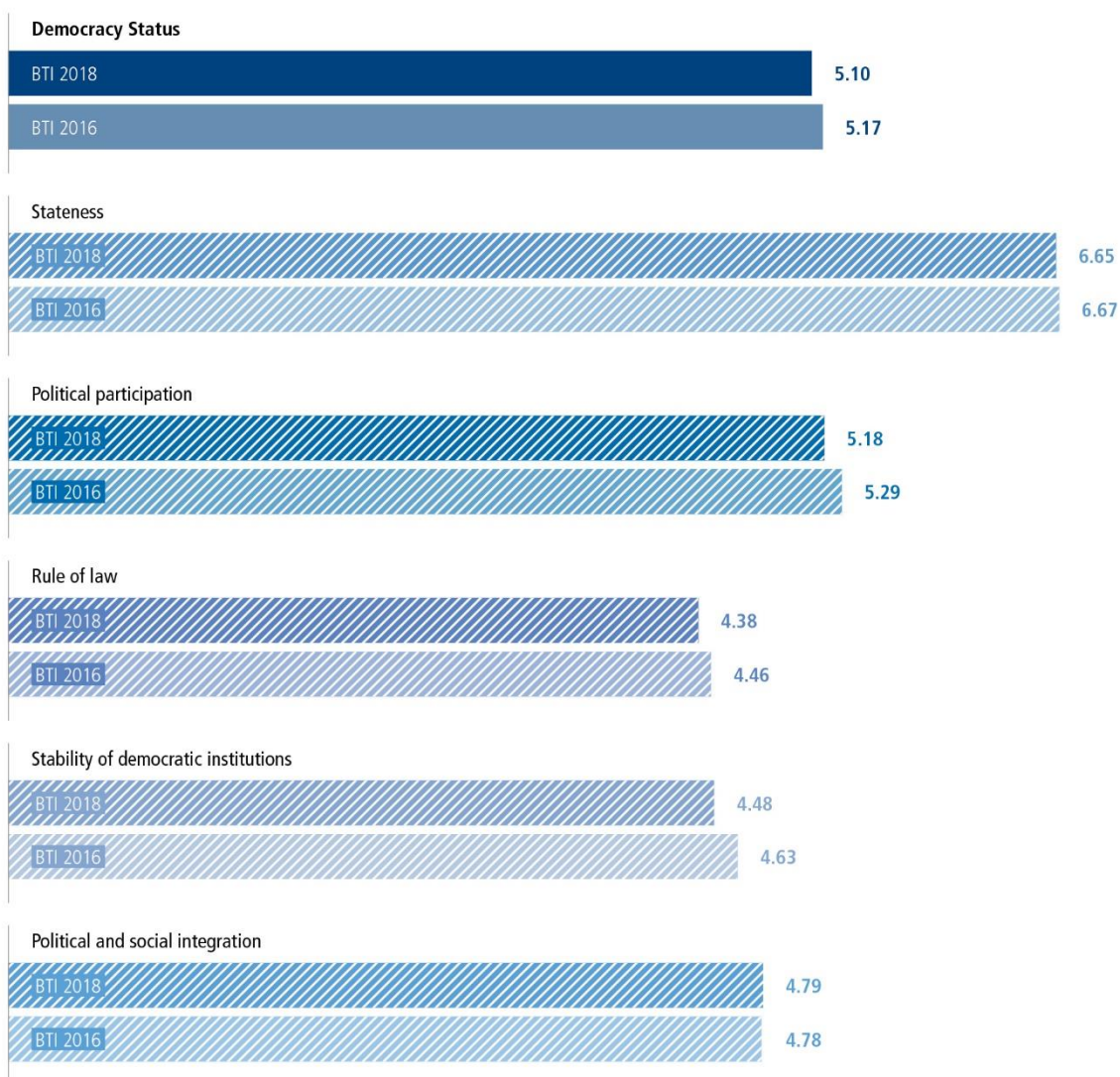
The period 2015-2017 saw a small decline in the extent of democratic transformation. It is important not to exaggerate the extent of the changes witnessed during this period – the magnitude of the deterioration (an average of -0.07) suggests democratic difficulties rather than democratic collapse. Nonetheless, these changes are consistent with a decade long trend of democratic backsliding and authoritarian retrenchment, and in many countries the quality of political rights and civil liberties continued to be undermined as governments deployed higher levels of repression to deal with the challenges posed by the spread of social media and the emergence of increasingly assertive civil society groups and opposition parties.

Figure 1: Political Transformation in Africa



Nothing has epitomized the curtailing of democratic checks and balances more than the removal of presidential term and age limits (Prempeh 2008). While such restrictions have been respected in more countries than they have been abandoned (Posner & Young 2018), 2015-2017 saw the continuation of a worrying trend in which leaders in the continent's most authoritarian states have used their control of the political system to set themselves up as presidents for life. Following Djibouti (2011), the Republic of Congo (2015), and Burundi (2015), term limits on President Paul Kagame were circumvented in Rwanda in 2017, while Ugandan President Yoweri Museveni – who had already freed himself from term limits in 2006 – successfully maneuvered the passage of legislation that led to the removal of age limits in late 2017 (Cheeseman 2019).

Figure 2: Political Transformation in Africa, Regional Averages BTI 2016-2018



This general trend dampened domestic and international confidence in the prospects for democratic consolidation in Africa. According to the Afrobarometer, which conducts nationally representative surveys across 37 African countries, although a strong majority of citizens in almost every African

country continue to believe that [democracy is the best political system](#) for their country, the strength of this support has fallen significantly in recent years (Mattes and Bratton 2016).

However, while the overall picture is concerning, there were also a number of more positive developments that punctuated this gloom. In 2004, Tunisia witnessed a peaceful transfer of power at the ballot box, as President Moncef Marzouki was defeated by Béji Caid Essebsi. Two years later, Ghana also experienced a smooth change of government in general elections held in December 2016 (Bob-Milliar and Paller 2018), which resulted in the defeat of a sitting president at the ballot box for the first time in the country's history (Cheeseman et al 2017). A year after that, President Yahya Jammeh's dictatorship in Gambia was brought to an end after he lost elections to Adama Barrow. Although Jammeh initially refused to accept the result of the elections, he was subsequently [forced to leave power](#) by concerted international intervention, including a clear statement against Jammeh from the African Union and the deployment of troops from the Economic Community of West African States (ECOWAS). More recently, the emergence of Abiy Ahmed as the new Prime Minister of Ethiopia on 2 April 2018, and the reformist agenda that he has identified, has raised hopes that in the future the ruling Ethiopian People's Revolutionary Democratic Front will govern in a more open, inclusive and responsive manner.

Table 1: Status of Political Transformation

Consolidating democracies Values 10 to 8	Defective democracies Values < 8 to 6	Highly defective democracies Values < 6	Moderate autocracies Values > 4	Hard-line autocracies Values < 4
Mauritius	Ghana	Mali	Uganda ▼ ▼	Cameroon
Botswana	Benin	Côte d'Ivoire	Togo	Rwanda
	South Africa	Lesotho	Algeria	Zimbabwe ▼
	Namibia	Madagascar	Mozambique ▼	Burundi ▼
	Senegal	Nigeria	Mauritania	Morocco
	Liberia		Angola	Egypt
	Tunisia			Central Afr. Rep. ●
	Malawi			Congo, DR ●
	Burkina Faso ▲ ▲			Chad
	Niger			Congo, Rep.
	Kenya			Ethiopia
	Sierra Leone			South Sudan ●
	Tanzania			Libya ●
	Guinea ▲			Sudan
	Zambia			Eritrea
				Somalia ●

This table follows the index values in the BTI 2018. The countries are ranked according to their respective score in the Democracy Index. Arrows mark a change of category compared with the BTI 2016, dots mark failing states.

The authoritarian drift taking place elsewhere on the continent is reflected in the change in BTI scores between the 2016 and 2018 reports. The average democracy status score in 2018 was just 5.10 out of 10, which represented a small decline from the 5.17 recorded in 2016. In line with this, table 1 confirms that more countries made a significant step towards authoritarianism (4) than towards democracy (2). However, it is important to note that the vast majority of states retained the same categorization as in 2016, demonstrating that in some cases the changes recorded were relatively minor. This is confirmed by the similar scores awarded for 2016 and 2018 for criteria such as political and social integration (figure 2).

One of the main drivers of democratic decline has been the deteriorating quality of freedom of expression, which fell from 5.34 to 5.16 between the last two rounds of the Index as a result of growing efforts to censor both traditional and social forms of media, and clamp down on dissent. In large part, the heightened repression witnessed on the continent reflects the difficulty that many ruling parties are facing in retaining control of the political agenda. Most notably, the deterioration in the quality of freedom of expression has often been triggered by the emergence of new opposition groups and the holding of tightly contested elections. Indeed, the BTI has recorded a steady decline in the extent of free and fair elections on the continent, from a recent high of 5.50 in 2014 to 5.45 in 2016 and down to 5.30 in 2018.

The significance of elections and term-limits to democratic backsliding is well demonstrated by the case of Uganda, the country which recorded the biggest decline in political transformation between the last two rounds of the BTI, which went from being considered a defective democracy to being categorized as a moderate autocracy. This deterioration was rooted in the controversy surrounding the 2016 general elections, which President Museveni won in controversial fashion. Although Museveni was officially declared to have won by a comfortable margin, the polls were heavily criticized by opposition parties, civil society groups and some international observers, and were marred by the harassment and arrest of opposition leader Kizza Bessigye (Abrahamsen and Bareebe 2016). As the BTI's report on Uganda notes, "The presidential and parliamentary elections held on February 18, 2016, along with their aftermath, overshadowed the period's other events". However, while the elections laid bare the authoritarian underpinnings of President Museveni's rule, it is important to recognize that they were not exceptional and instead echo the way that the National Revolutionary Movement (NRM) has governed over the last decade (Tripp 2010). Reflecting the centralization of power under the presidency, and the growing political role of the military, BTI reports have documented a consistent decline in the quality of rights to free speech and assembly, as well as the separation of powers and checks and balances against the abuse of office.

The only other country to witness such a dramatic shift in its political landscape was Burkina Faso, which moved in the opposite direction as a result of the removal of President Blaise Compaoré from power in 2014 after 27 years in office. Ironically, the trigger for the uprising which brought down Compaoré was his attempt to remove presidential term-limits. Lacking the political control enjoyed by his counterparts in Rwanda and Uganda, Compaoré was unable to contain popular disapproval of his attempt to prolong his presidency, and was forced to flee into exile after protestors set fire to the parliament building (Frère & Englebert 2015). This opening led to [presidential and legislative elections in 2015](#) that brought a new civilian government to power in the form of President Roch Marc Christian Kaboré of the People's Movement for Progress (Mouvement du Peuple pour le Progrès, MPP). The new government has succeeded in maintaining a political environment that is more open and respectful of political rights and civil liberties. However, the new dispensation also remains extremely fragile as a result of frequent terrorist attacks, the persistence of authoritarian elements within the army, and the limited roots of democratic institutions.

The divergent experiences of Burkina Faso and Uganda during this period reflect a broader trend of political polarization. As can be seen from table 1, the status of political transformation reveals a deeply divided continent, with roughly the same number of defective democracies (15) as hardline autocracies (16). There are few other parts of the world in which states are so polarized between countries firmly rooted in authoritarianism, such as Cameroon, Egypt and Rwanda, and those that

are defective democracies but nonetheless have the potential to consolidate over time, such as Benin, Ghana, Namibia, South Africa and Tunisia. By contrast, relatively few countries now occupy the categories in the middle of the status of political transformation spectrum.

Table 1 also reveals some important sub-regional variations. On average, [West and Southern Africa](#) have made considerable progress towards democracy over the past three decades, while East, Central and North Africa have made relatively little progress. This is particularly clear where North Africa is concerned: Egypt, Libya and Morocco are all rated as hard-line autocracies, with only Tunisia on a more democratic tractor. This reflects the troubled legacy of the Arab Spring, and the divergent pathways that these “revolutions” gave rise to. While the transition in Tunisia has given rise to a [fragile but comparatively stable civilian regime](#), Libya’s weak transitional government has failed to maintain political order or to establish effective democratic institutions. Similarly, the military overthrow of the elected government of President Mohamed Morsi in 2013 had led to widespread repression in Egypt, including the deaths of thousands of demonstrators, attacks on the country’s Coptic Christian community, the detention of almost all of the leaders of the Freedom and Justice Party – Morsi’s political vehicle, and the political arm of the Muslim Brotherhood – and a [broader crackdown on critical voices](#).

The roots of democratic backsliding and authoritarian retrenchment

Democratic backsliding and authoritarian retrenchment during this period was facilitated by a number of factors including the introduction of legislation permitting greater control over the media and non-governmental organizations (NGOs). A growing number of countries have passed [bills that tightly regulate NGOs](#), including limiting the amount of money they can receive from foreign sources, including Algeria, Ethiopia, and Rwanda. This trend has accelerated since 2015, with Egypt and Uganda introducing “anti-NGO” legislation.

Efforts to regulate social media have also accelerated in recent years. Between 2015 and 2017, Uganda, Gabon, Chad, Burundi and the Republic of Congo all shut down Internet services during elections. A number of countries have also pursued more subtle ways of controlling the flow of information. In August 2016, Zimbabwe introduced a draft Computer Crime and Cybercrime Bill that proved to be highly controversial. Although it has not yet been made law, the following year the government established a new ministry for Cyber Security, Threat Detection and Migration, which was widely interpreted by social media activists as a strategy [designed to empower the ruling party to clamp down on its online critics](#). More recently, in May 2018 Tanzania introduced legislation that forces bloggers to register with the government and pay [\\$930 for the privilege](#). In a similar manner, the Ugandan government introduced a social media fee in June 2018 following widespread criticism of President Museveni voiced online. The same month, Egyptian authorities passed laws that effectively criminalize anti-government views posted via the Internet.

Democratic backsliding has also been facilitated by the growing number of authoritarian external partners available to African states, including China, Iran, Russia, and Saudi Arabia. While many of these countries do not actively seek to promote authoritarian rule in client states, they do not attach stringent political conditions to the financial assistance they provide, effectively weakening the capacity of other states to enforce democratic standards. This trend has been compounded by a crisis of confidence in the efficacy of democracy promotion among key Western states (Carothers 2006).

While the United Kingdom – and to an extent the broader European Union – was consumed with Brexit from 2016 onwards, the determination of the United States to promote democracy abroad was called into question by the election of President Donald Trump in January 2017. Most notably, the State Department appears to have downgraded the significance places on [democracy promotion](#) in its broader mission.

As a result of these trends, governments that fail to uphold democratic norms and values have often gone unpunished by the wider international community.

Against this backdrop, it is particularly significant that the polarized nature of African political systems complicates the emergence of an effective regional response to democratic backsliding. Most obviously, the African Union (AU) is less likely to be able to reach consensus on appropriate standards of political rights and civil liberties when its members are so divided in terms of their own political systems.

In order to fully understand the role of the AU in supporting political transformation in Africa it is important to distinguish between measures that seek to protect democratic norms and values and those that simply outlaw unconstitutional transfers of power. Since the AU replaced the Organization of African Unity in 2002 and adopted a Constitutive Act prohibiting unconstitutional transfers of power, regional leaders have taken a much stronger position against military coups (Makinda et al 2015). To date, the AU has suspended a number of countries following military takeovers, including Mauritania (2005), Guinea (2008), Madagascar (2009), Cote d'Ivoire (2010), Egypt (2013), and the Central African Republic (2013). All were subsequently readmitted, usually after transition to civilian rule or a public commitment from military leaders to organize elections.

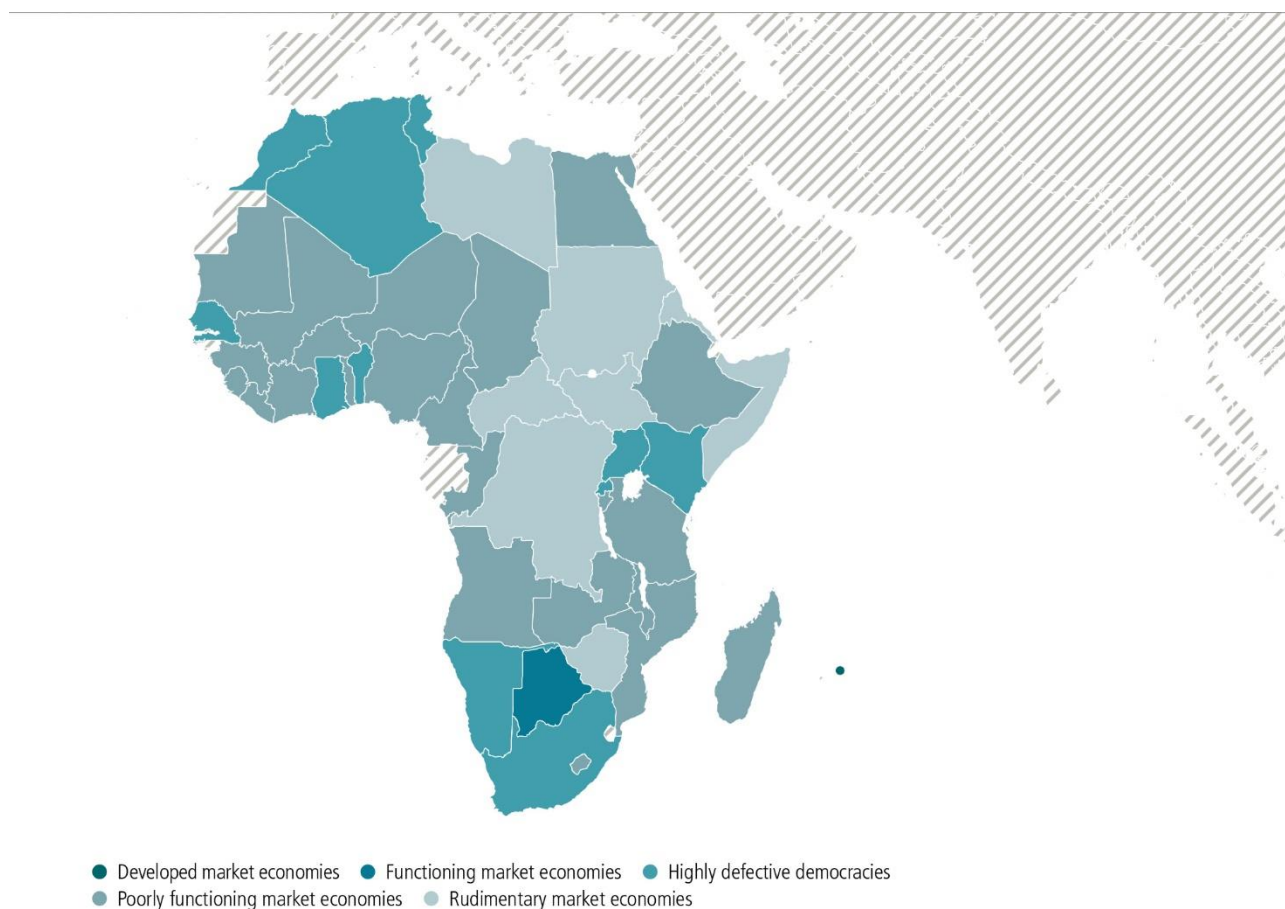
However, this has not been matched by an equivalent commitment to free and fair elections or deepening democracy more broadly (Tieku 2004). Despite the strong stance taken in Gambia, [AU election observers](#) rarely author reports that are as critical as their European Union counterparts, especially where the continent's more economically influential states are concerned. Moreover, the AU has been largely silent on processes of democratic backsliding that have resulted in serious human rights abuses in countries such as Cameroon and Zimbabwe. Instead, figures such as Cameroon's Paul Biya and Zimbabwe's Robert Mugabe have played a prominent leadership role within the AU itself (Tieku 2019).

This apparent double standard is rooted in self-interest and the balance of power within the AU. All presidents have an incentive to take a stand against unconstitutional transfers of government such as military interventions because doing so reduces one of the main threats to their own hold on power. By contrast, measures to force *existing* governments to allow freer and fairer elections would make it harder for incumbent leaders to outmaneuver opposition parties, and so would weaken their position. The governments of countries such as Angola, Cameroon, and Chad have therefore been careful to avoid supporting the adoption of any policies that would give the AU authority to intervene to prevent authoritarian retrenchment in order to avoid establishing a precedent that could later also be applied to them. As a result, the AU is poorly placed to defend democracy on a day-to-day basis, even though it is operating more effectively to deter the overthrow of sitting governments.

Economic Transformation

Economic transformation in Africa has also stalled. Following a period of promising economic growth in the 1990s, a combination of falling demand for commodity prices and the failure of many states to diversify their economies led to lower than projected economic growth between 2015 and 2017. On average, the economic growth of sub-Saharan Africa's petro-states fell from [5.4% in 2014 to 2.9% in 2016](#). In a number of countries including the Central African Republic, Libya, Mali, Mozambique, Somalia, Nigeria, and South Sudan, this trend was exacerbated by chronic political instability and in some cases civil conflict. In turn, falling revenue placed significant pressure on government budgets, and thus constrained the policy levers available to African leaders. Along with rising currency and price instability, this has hurt the living standards of citizens in many states. In a small but significant number of states including Tanzania and Zambia, this was compounded by the emergence of populist leaders who sought to intervene in the economy for political as much as economic goals, undermining investor confidence. One consequence of these changes has been the failure to effectively harness potential international support. Another – reflecting a broader continental trend – has been a rising debt burden that has diverted resources to debt servicing away and from investments in welfare and infrastructure.

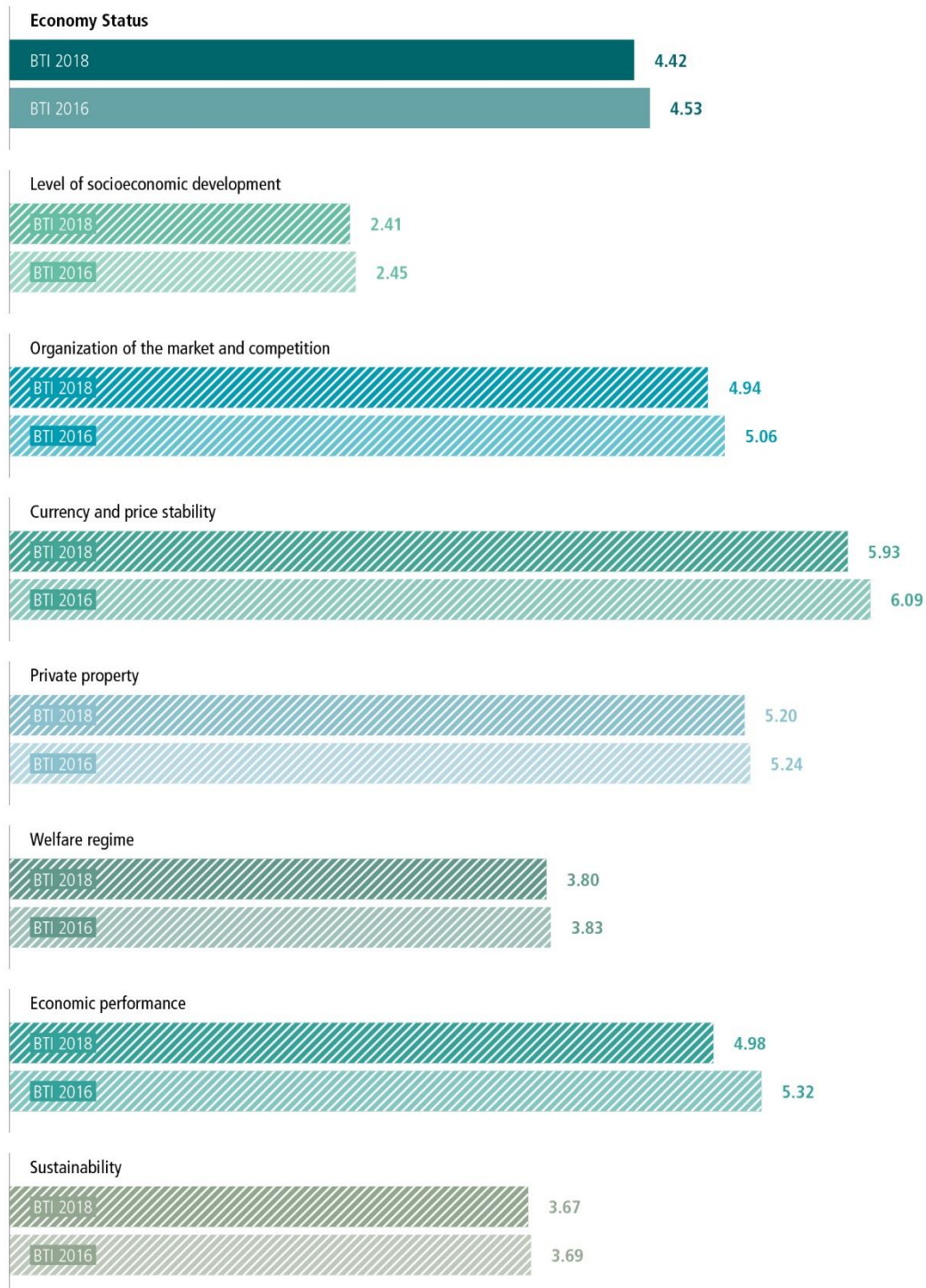
Figure 3: Economic Transformation in Africa



The challenging economic context facing the continent is reflected in the performance of individual countries and the wider region on key aspects of economic management. Between 2016 and 2018, the average score for market economy status fell from 4.53 to 4.42. This was not driven by any one

factor, but rather reflected falling scores on every main economic measure including the level of socio-economic development, currency and price stability, private property, welfare regime, economic performance and currency and price stability (figure 4).

Figure 4: Economic Transformation in Africa, Regional Averages BTI 2016-2018



The most significant deterioration occurred in the area of economic performance, where the falling value of key exports such as oil and copper undermined economic growth in a number of countries. According to the [African Development Bank](#), real GDP growth in 2015 was a robust 3.6%, which compared favorably with the 3.1% recorded by the global economy and was more than double the 1.5% achieved in the Euro area. However, growth fell to just 2.2% in 2016, largely as a result of a slowdown in the continent's major oil economies of Nigeria, Algeria and Egypt, which together account for more than half of Africa's GDP. Growth subsequently recovered to 3% in 2017, due to the stabilization of some commodity prices and the recovery of the global economic recovery from the financial crisis of 2007-8. However, this figure was still lower than projected, and below that achieved in 2015.

As with political transformation, it is important to note that the overall decline in economic performance masks a number of very different trends across the continent. Reflecting the pattern of the last five years, East Africa recorded the fastest rate of growth (5.1% in 2016 and 5.4% in 2017) as a result of [high government investment in infrastructure](#), solid domestic demand and comparatively high levels of economic integration. However, while this represented the best performance on the continent it is important to note that every East African state remained at the same level of economic transformation as in 2016 with the exception of Tanzania, which was recategorized downward as a poorly functioning economy.

The picture in North Africa has also been mixed. Overall, the region grew at a reasonable 3.1% in 2016 on the back of the economic recovery in Egypt. However, the collapse of the Libyan economy, which recorded negative growth throughout this period, continues to hold the region back, and there are concerns that high inflation and population growth will undermine the effect of growth in Egypt also. The situation was even more challenging in Southern Africa, where growth fell from 1.6% in 2015 to 0.9%. This follows the pattern of the last decade, in which the economic stagnation of South Africa – the regional hegemon – and the economic collapse of Zimbabwe have hampered trade and growth.

Central and West Africa also performed poorly, recording growth of just 0.4% and 0.5%, respectively, in part because of low oil prices, and in part because governments have failed to diversify their economies and create domestic demand through the promotion of sub-regional trade. West Africa was particularly badly hit by an [economic recession in Nigeria](#), which continued to suffer the effects of low oil prices and the Boko Haram insurgency into 2017. Because Nigeria represents almost three-quarters of West Africa's GDP, this all but wiped out considerable improvements in Cote d'Ivoire, Sierra Leone, Togo and Senegal. While the remainder of West Africa grew at an impressive 6% in 2016, the Nigerian economic shrank by 1.5%. Although sub-regional growth rebounded to 2.5% in 2017, Nigeria's economic difficulties continue to act as a brake on broader economic transformation.

A similar situation played out in Central Africa, where the contraction of three of the sub-region's oil economies in 2016, Equatorial Guinea (-7.3%), Chad (-6.4%) and the Republic of Congo (-2.4%) undermined the prospects for growth. This was compounded by political instability and conflict in the Central African Republic, and ongoing instability in nearby South Sudan and the Democratic Republic of Congo.

The debt burden

Falling economic growth placed government budgets under increasing pressure. Some governments responded by reducing expenditure, leading to a reduction in welfare spending – and a corresponding fall in the score for the welfare regime criterion from 3.83 to 3.80. In turn, this impacted on socio-economic development, which fell from 2.45 to 2.41 on the BTI index over the period. Other governments took a different approach, contracting additional debt in order to sustain investment in infrastructure and services. In turn, growing debt burdens increased the cost of debt servicing and raised fears of a new debt crisis.

This trend was epitomized by the [issuing of Eurobonds](#) by a wide range of African states including Angola, Côte d'Ivoire, Ethiopia, Gabon, Ghana, Kenya, Namibia, Nigeria, Rwanda, Senegal, Seychelles, South Africa and Zambia. The fact that early bond issues were oversubscribed led to considerable confidence among the continent's finance ministers that international loan markets could be used to fund investments that would drive economic growth, which in turn would ensure that governments could service the debt without having to reduce domestic expenditure. However, this rosy picture was subsequently called into question by global economic recovery – which made the continent a less attractive investment option – and growing concern over the purposes for which many African governments were using loans. Instead of investments designed to increase productivity, the Ghanaian and Zambian governments are accused of diverting loan funds to fund recurrent government expenditure. At the same time, [corruption scandals hit the front pages in Kenya](#), as opposition politicians accused government leaders of misappropriating international loans for their own benefit.

Taken together, these trends forced up the cost of borrowing for the continent's less successful economies, and meant that African states became considerably more indebted during this period. According to figures collated by the [Brookings Institution](#), between 2008 and 2016, the public debt to GDP ratio in sub-Saharan Africa more than doubled to over 40% for the first time since the Heavily Indebted Poor Countries (HIPC) debt relief initiative, and by 2017 had surpassed 50%. These estimates are particularly concerning given that they do not include arrangements that have not been made public, such as the ["hidden debt"](#) contracted with some Chinese lenders.

The capacity of African states to sustain this level of debt varies considerably. Countries that continue to grow quickly, such as Ethiopia, and generate high levels of income through the export of oil and gas, such as Equatorial Guinea, may be able to meet their debt repayments. But in 2017 a number of economies with a history of inconsistent economic performance already had exceptionally high debt burdens, including Eritrea, the Republic of Congo, Egypt, Mozambique and Mauritania, where the debt to GDP ratio exceeds 95%. This represents a major challenge to economic sustainability.

The populist challenge

Where economic transformation is concerned, four countries experienced a change of category for the worse between the last two rounds of the BTI: Lesotho, Tanzania, Zambia and Zimbabwe (see table 2). In two of these cases – Tanzania and Zambia – this has been widely attributed to the emergence of populist leaders willing to embrace unfeasible economic policies. In reality, the populist threat to responsible economic and political management is often exaggerated in Africa. On the

one hand, there are very few countries that are led by figures who can seriously be considered to be populists. On the other hand, populist movements have at times succeeded in channeling popular support for increasing government expenditure in important areas such as health and education, and so contributed to higher levels of socioeconomic development (Cheeseman and Hinfelaar 2009). This was the case in Zambia, where Michael Sata's Patriotic Front advocated for a bigger healthcare budget and a national minimum wage in opposition, and then delivered on some of these promises after winning power in 2011.

Table 2: Status of Economic Transformation

Developed economies Values 10 to 8	Functioning economies Values < 8 to 7	Economies with functional deficits Values < 7 to 5	Poorly functioning economies Values < 5 to 3	Rudimentary economies Values < 3
Mauritius ▲	Botswana	South Africa	Côte d'Ivoire	Central Afr. Rep.
		Tunisia	Tanzania ▼	Zimbabwe ▼
		Uganda	Zambia ▼	Congo, DR
		Rwanda	Egypt	Libya
		Ghana	Lesotho ▼	Sudan
		Namibia	Togo	South Sudan
		Morocco	Madagascar	Eritrea
		Kenya	Liberia	Somalia
		Senegal	Cameroon	
		Algeria	Malawi	
		Benin	Burkina Faso	
			Guinea	
			Mali	
			Mauritania	
			Burundi	
			Mozambique	
			Sierra Leone	
			Niger	
			Nigeria	
			Angola	
			Ethiopia	
			Congo, Rep.	
			Chad	

This table follows the index values in the BTI 2018. The countries are ranked according to their respective score in the Economy Index. Arrows mark a change of category compared with the BTI 2016.

However, these caveats notwithstanding, the examples of Tanzania and Zambia since 2015 suggest that in some cases populist presidents have been responsible for deteriorating economic management. In Zambia, President Edgar Lungu came to power in 2015, taking over from Michael Sata following his untimely death in office in late 2014. Lacking his predecessor's charisma and forced to contest a presidential by-election in 2015 and then a general election just a year later, Lungu struggled to assert his authority. Against a backdrop of low copper prices – Zambia remains heavily dependent on copper to generate foreign exchange and finance rising debt – Lungu persisted with the populist stance of the Patriotic Front but took it in an increasingly repressive direction. Most notably, following the controversial election of 2016, his main rival, Hichilema Hakainde, was [arrested on politically motivated charges of treason](#) (Sishuwa 2018).

Afraid of losing the popular support that he will need to run for a [third term in office](#)¹ the president has consistently shirked making the difficult decisions necessary to secure the country's long-term economic future. Most notably, the PF has not managed to agree a \$1.3 billion economic rescue package with the International Monetary Fund, despite three rounds of negotiation. As a result of the failure to secure additional funds and Lungu's refusal to cut government spending, government debt continued to escalate and [now exceeds \\$12.5 billion](#) – over 60% of GDP. In turn, the cost of debt servicing has risen to over \$1 billion a year – more than the entire budget for health and education – and risks becoming unsustainable, particularly as economic growth fell from 5.1% in 2013 to 3.3% in 2016.

In Tanzania, the election of the populist John Magufuli in 2015 also had important economic consequences. Nicknamed the "[bulldozer](#)" for his uncompromising style, Magufuli quickly earned praise for being prepared to get his hands dirty, joining street sweepers to clean outside his official residence. However, the president's determination to force through his favored policies often led him to take controversial positions and to operate outside of the formal channels of policy formation. In the absence of effective public sector reform, the frequent dismissal of officials accused of corruption has been praised for demonstrating a genuine desire to deal with graft, but also generated considerable instability in key economic areas including the management of parastatal bodies. At the same time, a crackdown on opposition parties raised concerns about [democratic backsliding](#) (Paget 2015). In this context, hostile rhetoric against foreign investors, and threats that taxation could be unilaterally increased, contributed to a decline in Foreign Direct Investment from 4.3% of GDP in 2015 to 2.6% in 2016, while export growth fell from 17.7% of GDP in 2014 to 5.2% in 2016. As a result, although Tanzania has enjoyed healthy economic growth (at around 7% per year), it missed out on an important opportunity to achieve further economic transformation and poverty reduction.

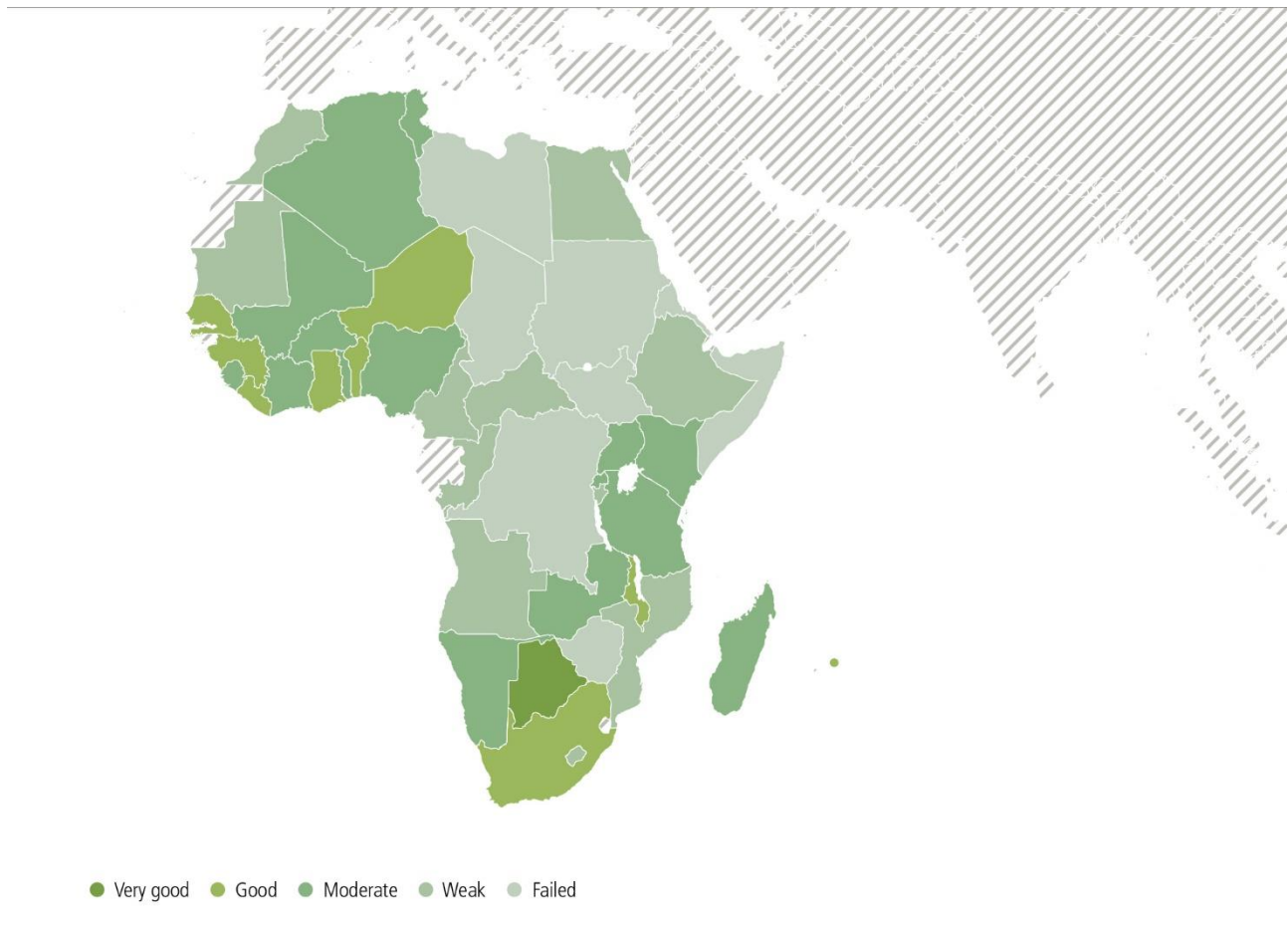
It is also important to note that populist movements and leaders may have a significant impact even when they don't win power. In South Africa, for example, Jacob Malema and his Economic Freedom Fighters (EFF) have played an important role in shaping the policy of the ruling African National Congress (ANC) under new president Cyril Ramaphosa. Having done an impressive job of keeping the pressure on President Jacob Zuma while he was in office, using high profile stunts inside and outside of parliament to highlight his corruption, the EFF played a central role in pushing [land reform on to the agenda](#). In particular, Malema's support for land expropriation without compensation forced the ANC – which has previously adopted a much more cautious approach – to adopt a similar policy in order not to be outflanked on an issue of growing salience. This raises the prospect that the EFF may be able to effect further policy changes without ever holding power by playing on ANC fears that the party could atrophy support following its fall from grace under Zuma.

¹ Lungu's supporters claim that he should be allowed an additional term as his first term in office replacing Sata only lasted for 18 months, despite the constitution having a two-term limit. His eligibility was confirmed by the Constitutional Court in December 2018 – a body to which he appointed all of five judges.

Governance

In line with the trends already documented, the quality of governance in Africa declined by a small but significant amount between 2015 and 2017. This was the result of five broad trends: continued conflict and political instability; a failure to reduce corruption and waste; a lack of consensus and government legitimacy in many countries; the rise of economic nationalism in a small number of states; and, slow progress towards regional integration.

Figure 5: Governance in Africa



The first of these trends is particularly significant, as a number of African states feature particularly low levels of steering capability – the ability of a government to prioritize which policies to pursue, implement them, and learn from past mistakes. In part, this is due to a history of economic and political mismanagement that began during the colonial period and which has generated [ongoing political instability](#), thus deflecting government attention away from the challenge of the day-to-day management of the economy in countries such as Burundi, the Central African Republic, the Democratic Republic of Congo, Egypt, Libya, Mozambique, Nigeria, Somalia, South Sudan, and Zimbabwe.

The second trend – the failure of a number of countries to take significant action against corruption and waste, resulting in a decline in the regional average score for anti-corruption policy from 3.61 to 3.52 – also has deep historical roots (De Sardan, 1999). Countries whose scores declined on the BTI’s anti-corruption policy indicator between 2015 and 2017 include Ghana, Liberia, Mauritania, Mozambique, Namibia, Senegal and Sierra Leone. In turn this undermined the overall quality of

procurement processes and resource efficiency, the average score for which fell from 4.08 out of 10 to 3.93 over this period.

In the third trend, growing political tensions resulting from controversial election results and the greater use of repression described above led to a breakdown in consensus-building in many states. Especially in contexts where coercion went hand-in-hand with an ethnicized form of winner-takes-all politics, as in the Democratic Republic of Congo, Kenya, and Sudan, it resulted in an intensification of ethnic cleavages and lower levels of civil society participation. Along with [continued terrorist activity](#) in the Sahel and parts of East Africa, this undermined the potential to enhance the legitimacy of a number of states. It is also true that in other cases, such as Egypt, were able to use the threat of terrorism to build public support for adopting repressive policies in the interest of promoting stability and security (Oyewole 2015).

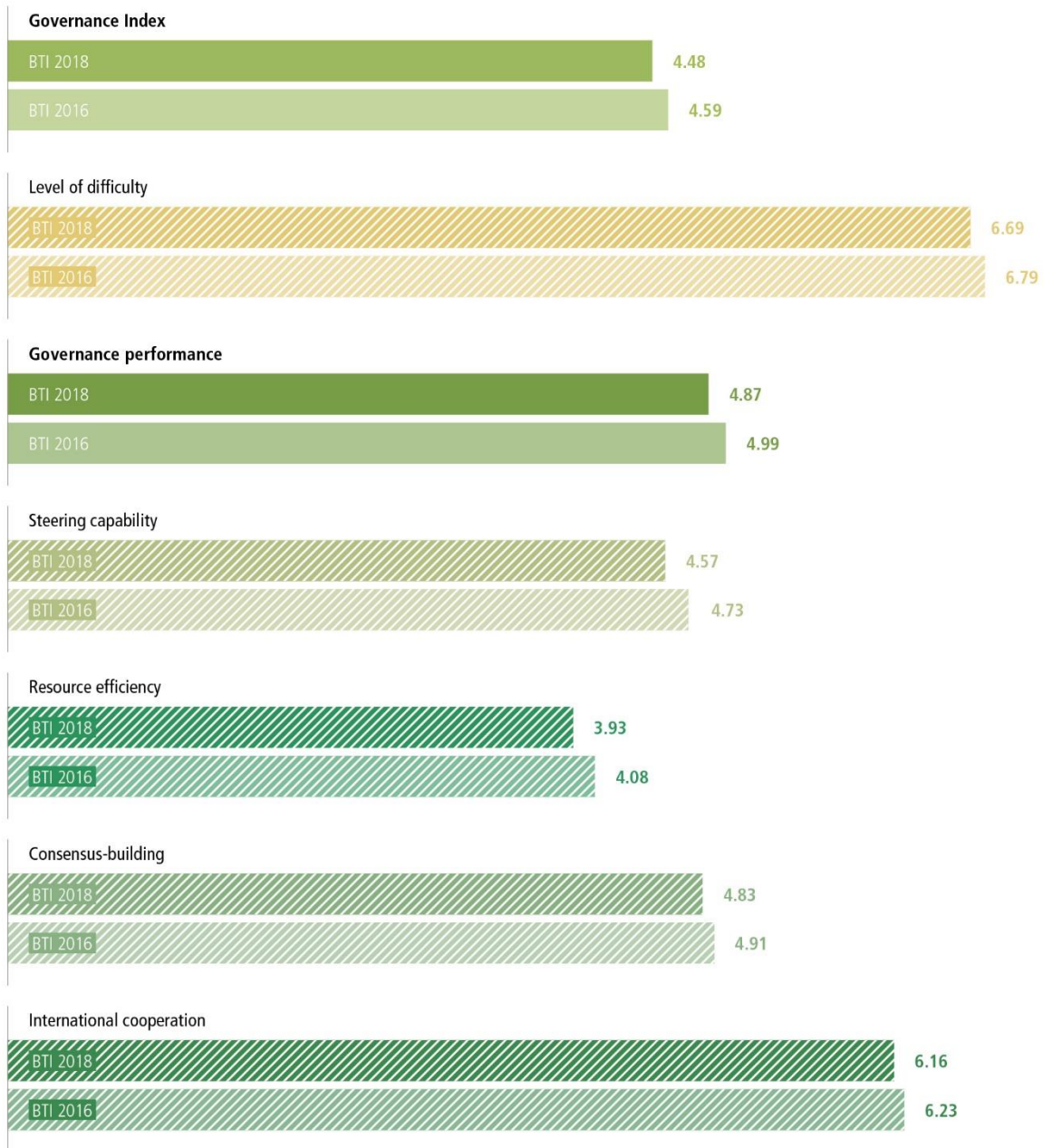
The decision of some ruling parties to push a form of economic nationalism, as described above, compounded these challenges. As a result, countries such as Tanzania, Zambia, and Zimbabwe failed to take advantage of the opportunities on offer through international cooperation. In Zimbabwe, for example, President Robert Mugabe's government (which was still in power between 2015 and early 2017) alienated Western donors and some neighboring states by claiming that opposition parties were doing the bidding of former colonial powers, claiming that his regime was being forced to fight a second war of liberation from the United Kingdom (Tendi 2010). The repression utilized by Mugabe, and his hostility to Western powers, meant that Zimbabwe was effectively cut off from the international economic assistance that could have helped his country to avoid a number of [economic disasters](#), including hyperinflation, the loss of the Zimbabwean currency, the collapse of public services and the failure of the government to respond effectively to health crises (Chigudu 2019).

Some of these problems were alleviated when Mugabe was forced to enter a power-sharing government with the Movement of Democratic Change opposition following flawed elections in 2008. With the MDC's Tendai Biti as Finance Minister, Zimbabwe's relationship with economic partners and international financial institutions considerably improved. Along with four years of relative political stability and the dollarization of the economy, this resulted in a [period of economic recovery](#). However, Zimbabwe's uptick ended with the power sharing administration in 2013, and from that point onwards the economy suffered another collapse characterized by high fiscal imbalances, low economic growth, limited foreign direct investment and chronic cash shortages. Partly as a result, economic growth fell to just 0.7% in 2016, while poverty and inequality remained worryingly high. Although the Zimbabwean experience was somewhat exceptional, Mugabe was not alone: as we saw in the previous section, between 2015 and 2017 populist leaders in Tanzania and Zambia also failed to take advantage of the potential political and economic gains that can be realized through international cooperation.

This problem was exacerbated by a fifth trend, namely the ongoing political and economic tensions at the regional level, which meant that there was a lack of significant progress in terms of economic integration. Most notably, progress towards greater political and economic cooperation within the East African Community – which has proved to be one of the continent's most [dynamic economic blocs to date](#) – has been constrained by the long period of time that it has taken Kenya, Tanzania and Uganda to agree on the route of a prospective oil pipeline. The design of the pipeline, and the question of whether it goes through Kenya or not, is critical not just to get the sub-region's natural resources to market, but also because it is central to the [Lamu Port-South Sudan-Ethiopia-Transport](#)

[\(LAPSSET\) Corridor](#) project that the Kenyan government hopes will promote development and transform the northern part of the country.

Figure 6: Governance in Africa, Regional Averages BTI 2016-2018



Other elements of economic integration that have been long promised by EAC leaders, including a common visa, a common currency, and an end of the many exceptions that member states can apply to except goods from the common market, have yet to be effectively implemented. This reflects a broader trend that if anything is even more pronounced where the Common Market for Eastern and Southern Africa (COMESA) and the Economic Community of West African States (ECOWAS) are concerned. Similar challenges also remain at the continental level. Although there has been

considerable talk about overcoming the overlapping membership and inconsistent rules of the continent's various sub-regional economic communities by establishing an African Free Trade Zone, this had not been achieved by the end of 2017.

Governance trajectories

The impact of these five trends can be seen in figure 6, which reveals that the average governance scores for Africa fell across the board between the last two rounds of the BTI – although the extent of the decline was relatively modest. It is important to note that the BTI's overall Governance Index is calculated by multiplying governance performance by the level of difficulty in order to generate a measure that takes into account the challenges faced by a country. As a result, an improvement in conditions may result in lower scores as it reduces the multiplier effect. The overall decline in the Governance Index over the last two years reflects both a deterioration in government performance and an easing of the challenges facing some African governments.

As with political transformation, continental averages mask very different trajectories at the state level. With the exception of the category of “very good” governance, which features just one country – Botswana – African states are fairly equally spread across the spectrum ranging from “good” to “very weak” governance. The distribution of countries with regards to resource efficiency and steering capability demonstrates this point well. Nine countries score lower or equal to 3.0 out of 10 when it comes to their ability to make and implement appropriate policies, making them some of the lowest ranked countries surveyed by BTI, but two – Botswana and Mauritius – receive scores over 7.5, meaning that they outperform countries such as India and South Korea.

Table 3: Quality of Governance

Very good	Good	Moderate	Weak	Very weak
Values 10 to 7	Values < 7 to 5.6	Values < 5.6 to 4.3	Values < 4.3 to 3	Values < 3
Botswana	Senegal	Côte d'Ivoire	Morocco ▼	Chad
	Mauritius	Namibia ▼	Mozambique ▼	Congo, DR
	Ghana	Tunisia	Central Afr. Rep.	Zimbabwe
	South Africa	Uganda ▼	Mauritania	South Sudan
	Niger	Rwanda	Egypt ▼	Libya
	Benin ▲	Burkina Faso	Ethiopia	Somalia
	Liberia	Mali	Angola	Sudan
	Guinea	Madagascar	Lesotho	Eritrea
	Malawi	Togo	Cameroon	
		Tanzania	Burundi	
		Zambia	Congo, Rep.	
		Sierra Leone		
		Kenya		
		Nigeria ▲		
		Algeria		

This table follows the index values in the BTI 2018. The countries are ranked according to their respective score in the Governance Index. Arrows mark a change of category compared with the BTI 2016.

The same variation can also be seen when it comes to other issues like corruption. African states comprise 7 of the 13 most corrupt states in the world according to the BTI, including the two worst

states on this measure: South Sudan and Somalia. But while the majority of African states fare poorly on global corruption indices, the popular image of a continent mired in corruption is an unhelpful generalization because a significant minority of states have made impressive progress towards reducing graft. Most notably, in 2017 Botswana was ranked as the 34th least corrupt country in the world, placing it ahead of the Czech Republic, Poland, and Spain. Cape Verde (48), Mauritius (54), Namibia (53), Rwanda (48) and Senegal (66) are not far behind.

While the diversity of trajectories on the continent defies easy generalization, there are some regional variations in the quality of governance of which it is worth taking note (Table 3). As with political transformation, the continent's best performing states are by and large grouped in Southern and Western Africa, with Central and Eastern African states making up the majority of countries with weak or very weak governance. North African states also rank poorly on this measure: with the exception of Tunisia, all feature either weak or very weak governance, reflecting the challenge that these states have in effectively managing their natural resources and building an effective and meritocratic bureaucracy. Indeed, in the 2018 BTI Libya was ranked as the worst performing country surveyed in terms of resource efficiency.

However, while these variations are significant because they may give rise to neighborhood effects – in which the poor governance of neighbors spills over the border, generating negative outcomes for other states – it is also important to recognize that each region also contains divergent trajectories. Southern Africa, for example, features Botswana (very good governance) and Malawi and South Africa (good), but also Angola and Mozambique (weak) and Zimbabwe (very weak). West Africa is also split between a number of countries that are performing well, most notably Benin, Ghana, Liberia, and Senegal and those that are struggling (Mauritania, Nigeria).

Outlook

The last two years have witnessed a small but significant deterioration in the quality of political and economic transformation in Africa. However, this disappointing outcome masks multiple trends. While a number of aspiring democracies are holding their own, both in terms of respect for political rights and civil liberties and economic performance, many of the continent's more authoritarian states have become even more repressive and entrenched. At the same time, the high and consistent economic growth achieved by countries such as Ethiopia, Mauritius, and Rwanda, means that governments in these states have been able to take greater control of their economic destiny at the same time as those countries struggling with civil war and unsustainable debt burdens have watched their economies stagnate, reducing the policy options available to the ruling party. As a result, this heterogeneous continent is likely to see even greater polarization where the quality of democracy and economic governance is concerned in the future.

Significantly, there is no evidence that convergence on a common ground is likely in the short-term. If anything, the continent's more democratic and autocratic states appear to be moving further apart. From 2015 onwards, two countries (Burundi and Zimbabwe) were downgraded to the hard-line autocracy category and not a single country moved in the other direction. One reason for this is that the lack of serious consequences for democratic backsliding and authoritarian retrenchment mean that Africa's authoritarian regimes have few international incentives to change course. Significantly, there is little evidence that the international donors that have traditionally promoted democracy abroad intend to increase their investment in this area in the years to come. Meanwhile the number of authoritarian external partners available to African states continues to grow, offering greater choice than ever before and further diluting the international pressure to democratize.

The impact of the continent's political challenges on economic transformation will be mediated by the complex relationship between democracy and economic growth. While the vast majority of authoritarian states have experienced significant economic difficulties over the past two years, Ethiopia and Rwanda have continued to grow at impressive rates as a result of the ability of developmental governments to direct investment into productive sectors while maintaining tight control over corruption and the distribution of rents (Booth and Golooba-Mutebi, 2012). At the same time, a number of democratic states have suffered considerable economic difficulties, most notably Ghana. It is therefore important not to assume that democratic backsliding will always undermine economic transformation, or that democratic progress will always deliver it. However, recent research has found that on average Africa's democracies grow at a faster rate than its autocracies, and that this "democratic advantage" is more pronounced among countries that have been democracies for longer (Masaki and van de Walle 2014).

The BTI rankings for 2018 help to explain why this is the case. Not a single hard-line or moderate autocracy is ranked as having "good" or "very good" governance during the period 2015-2017. Similarly, the two countries considered to have developed or functioning economies are both consolidating democracies: Botswana and Mauritius (Caroll and Caroll, 1997). While some authoritarian states are recognized to have above average economic transformation and moderate governance, most notably Rwanda and Uganda, these are very much the exceptions that prove the rule. Tellingly, all of the states categorized as having rudimentary economies and very weak governance are either in a state of extreme political instability, or are authoritarian regimes. Taken together, this provides strong evidence that on average Africa's more democratic states grow faster because the presence

of constitutional checks and balances and stronger accountability mechanisms means that they enjoy better governance and develop more functional economies. Other things being equal, this suggests that further authoritarian retrenchment will undermine economic transformation.

This conclusion is particularly significant for the future of those authoritarian countries that are heavily indebted. Effectively managing debt burdens that in some cases exceed 100% of GDP is possible, but only if governments use loans to increase the productivity of the economy while reducing budget deficits. If this can be achieved, strong growth will render the servicing of large debt repayments more feasible, while fiscal discipline will reduce the need for fresh loans to be contracted. The challenge facing countries such as Chad, Democratic Republic of Congo, Mauritania, Sudan, South Sudan and Zimbabwe is that poor governance and economic mismanagement means this is unlikely to be achieved. As a result, a fresh debt crisis is more likely than not, at least in the most effected countries. The broader consequences of this for Africa will depend on how many countries end up in debt distress, and whether one of the continent's larger economies – Angola, Egypt, Ethiopia, Kenya, Nigeria and South Africa – fall into this category. None have done so yet, but [all six of these states](#) have become significantly more indebted over the last few years and this trend is likely to continue at least for the near future.

For these reasons, there are a number of clouds on Africa's economic and political horizon. However, it is important to note that some of these clouds may prove to have silver linings. In addition to declining international pressure, authoritarian retrenchment has been driven by the efforts of governments to outmaneuver pro-democracy movements and opposition leaders. This has become an increasingly difficult task, because the expansion of education, growing [penetration of mobile phones](#) with internet capacity, and rapid urbanization has resulted in the emergence of more critical citizens and falling support for poorly performing governments (Tinh 2016; Durotoye & Husaini 2016). The process of urbanization has been particularly significant, because on average [urbanites are much more likely to vote for opposition parties](#) than their rural counterparts. As a result of these processes, the number of ruling parties that are dominant – in the sense that they secure more than 60% of the presidential and legislative vote – has fallen considerably, from 70% in 1997 to just over 50% in 2015 (Cooper 2016). In other words, one of the main factors that has contributed to the recent wave of repression is the growing difficulty that ruling parties have in retaining power through other means.

Viewed in this way, the authoritarian entrenchment witnessed over the last decade is both a cause for concern and for optimism. While the consequences of this trend have been deeply problematic, the growth in the urban electorate – which is projected to be [greater than the total number of rural voters before 2050](#) – combined with the willingness of citizens to demand better public services and more responsive leaders, has the potential to ground a process of democratization in the longer-term. As recent unheralded transfers of power in Burkina Faso, Gambia and Nigeria have demonstrated, political breakthroughs often happen when they are least expected.

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