

PANORAMA



Political risks in Africa: the temperature is rising

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**CONFLICT AND
TERRORISM CONTINUES
IN AFRICA**

7
**HIGH SOCIAL
RISK, PERSISTENT
FRAGILITIES**

Africa has seen a bevy of political events in recent months. After the deterioration of the security situation in the Sahel, as well as the forced departures of historical leaders from Algeria and Sudan via the streets, where will the political risks manifest in the second half of the year? Using its quantitative political risk model (Insert 1), created in March 2017¹, Coface intends to identify – beyond the pace dictated by current events – recent political risk trends and thus the countries to be monitored.

Over the recent decades, regular conflicts of varying intensities and natures have marked Africa, leading notably to a decline in investment and trade flows, delaying the development of some African countries. Recent years have seen a resurgence of conflicts on the continent, mainly as a result of the activities of various Islamist groups, particularly in the Sahel region, mobilizing the armed forces of certain states on the continent and targeting civilian populations. Conflicts of political origin – sometimes mixed with ethnic, religious or even linguistic considerations – also remain present in Africa (Libya, Central African Republic, Democratic Republic of the Congo, Cameroon...).

Our indices of political violence also confirm that violent events (conflicts and/or terrorist acts), although more localised, have become relatively common again, particularly in the Sahel, compared to the beginning of the 21st century: compared to 2008, there were almost twice as many conflicts across the continent in 2018.

Moreover, as events in North Africa and the Middle East in 2011 have shown, as mobilisation instruments develop, the exasperation of populations, fuelled by socio-economic pressures exposes some countries to the risk of future instability. Although large-scale conflicts, as in Libya, or regime changes are not a given, a fragile socio-economic context can, in the long term, cause unrest that can generate, at a minimum, uncertainty in the political environment. Our political and social fragility index indicates that 10 countries – Angola, Cameroon, Chad, Djibouti, Egypt, Ethiopia, Mauritania, Mozambique, Uganda and the DRC – could be or continue to be affected in the foreseeable future. The increase in mobilisation instruments is one of the factors behind the increased risk. This dynamic, in force throughout the continent, could potentially lead to a multiplication of destabilizing political events in Africa in the longer-term.

¹ DAUDIER, J.-L., NIZARD, R. & TOZY, S., March 2017. "The rise and rise of political risks", Panorama Coface. URL: <https://www.coface.com/News-Publications/Publications/The-rise-and-rise-of-political-risks>



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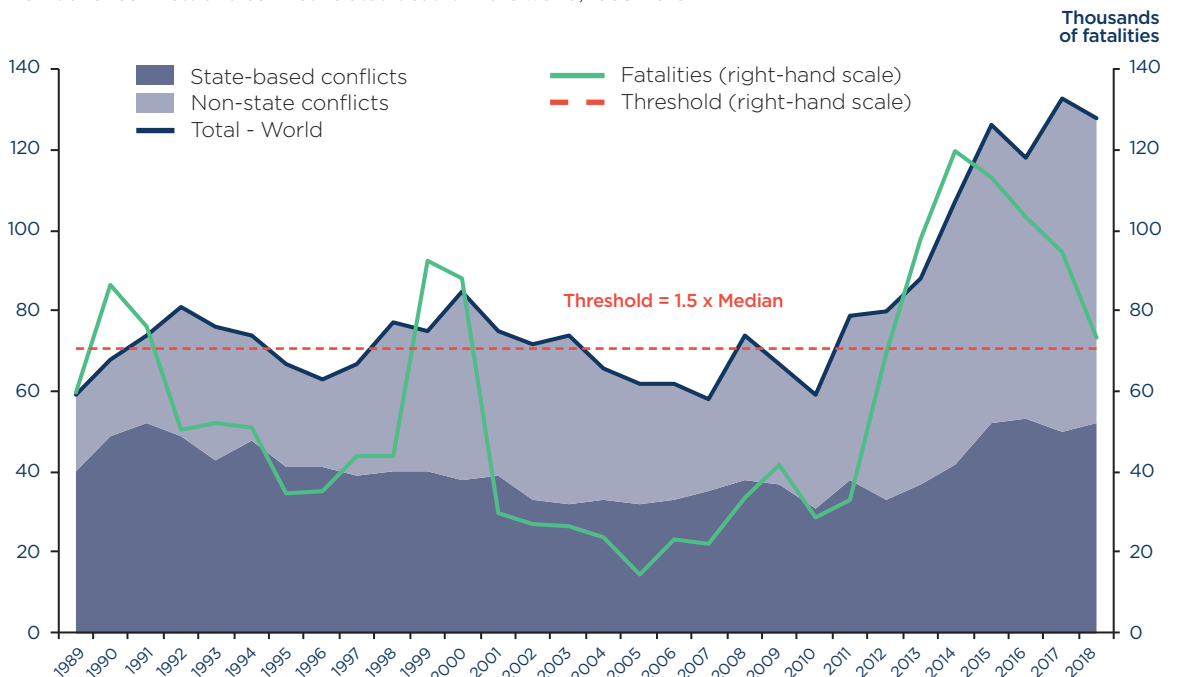
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1 CONFLICT AND TERRORISM CONTINUES IN AFRICA

As Coface reported in 2017, the world is experiencing an upsurge in conflicts² that has not abated in recent years: despite a decline in 2018 after the historical record set in 2017, the number of conflicts has increased by 70% since 2008, with 2.2 times more victims (Chart 1). Over the past five years, the number of casualties has exceeded

the 70,000 mark³ each year for the third time in 30 years (after the 1990-1991 periods, at the height of the Gulf War, and 1999-2000, marked by the fratricidal war between Ethiopia and Eritrea). At the same time, terrorism⁴ is spreading as another form of political violence (Chart 2).

Chart 1:
Number of conflicts and conflict-related deaths in the world, 1989-2018



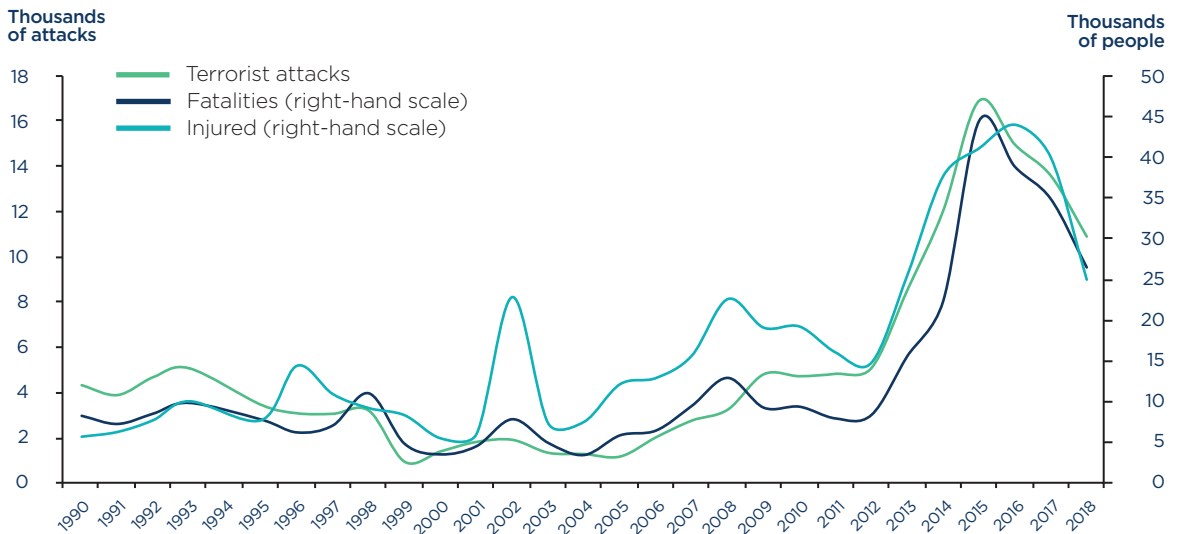
Source: Uppsala Conflict Data Program (UCDP), Coface

² The definition of conflict used in this study is based on the Uppsala Conflict Data Program databases, in order to include armed confrontations between two factions, groups and/or states. Unlike the definition of international law, the Uppsala definition incorporates armed conflicts between two non-governmental groups. Unilateral acts of violence were excluded to avoid double measurement of terrorist acts, which were also measured using another database (Global Terrorism Database).

³ This threshold corresponds approximately to 1.5 times the median number of victims of conflict between 1989 and 2018.

⁴ The definition of terrorism used is based on that of the Global Terrorism Database project, which is used to calculate the terrorism index. A terrorist act is "the threat or effective use of unlawful force and violence by a non-state actor to achieve a political, economic, religious or social objective through fear, coercion or intimidation."

Chart 2:
Evolution of terrorist attacks and associated victims, 1989-2017



Source: Global Terrorism Database, Coface

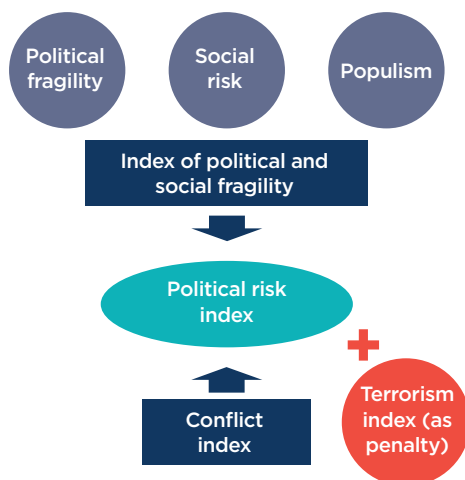
Insert 1 :

The Coface political risk model

Coface's political risk model takes into account two main risk categories:

- **security risk**, which includes conflicts and terrorism,
- **the risk arising from political and social fragility**, which also includes populism (Diagram).

Diagram: Coface's Political Risk Model



Security risk assessment is based on the observation of **conflicts** and **terrorist** acts around the globe. Both indices measure the risk according to the occurrence of battles

and/or terrorist attacks, their intensity and the actors involved, based on third-party databases⁵.

The risk arising from political and social fragility is based on three distinct indices:

1) The **social risk index**⁶, which takes into account 2 pillars. The first is *pressures* for change, measuring the degree of social frustration taking into account socio-economic factors such as inflation, the unemployment rate, income inequalities as measured by the GINI coefficient, GDP per capita (in level and evolution), the perception of corruption, the population's capacity for expression and the homicide rate. Nevertheless, this frustration only results in effective political change if the population has *instruments* to express it, with these instruments forming the second pillar. The variables included to measure these instruments are: the rate of higher education, the rate of adult literacy, internet access, youth proportion in the population, fertility rate, urbanization rate and female participation rate.

2) In order to identify cracks in the foundations of the political system, Coface also establishes a **fragility index** based on the nature of the political system, ethnic, religious and linguistic fractionalization, and the degree of political freedom and civil rights available to the population.

3) Specific variables from the *Manifesto Project database*⁷, based on textual analysis of the content of political parties' electoral platforms, make it possible to establish an index taking into account the rise of populism, in order to better understand the rise of social frustrations in some democracies⁸.

5 For conflicts, these are the databases compiled by the Uppsala Conflict Data Program (UCDP). For terrorism, the database built by the Global Terrorism Database initiative is used.

6 The measurement of social risk was improved in 2017, but was developed in 2013. See MARCILLY, J., ZLOTOWSKI, Y. March 2013. "Emerging political risk transformations", Panorama Coface. URL: <https://www.coface.fr/Actualites-Publications/Publications/Transformations-du-risque-pays-emergent>.

7 Le Projet Manifesto, financed by Deutsche Forschungsgemeinschaft, is hosted by Wissenschaftszentrum Berlin für Social research (Volkens, Lehmann, Matthiess, Merz, Regel) (<https://manifesto-project.wzb.eu>).

8 Only South Africa has an assessment for populism on the African continent.

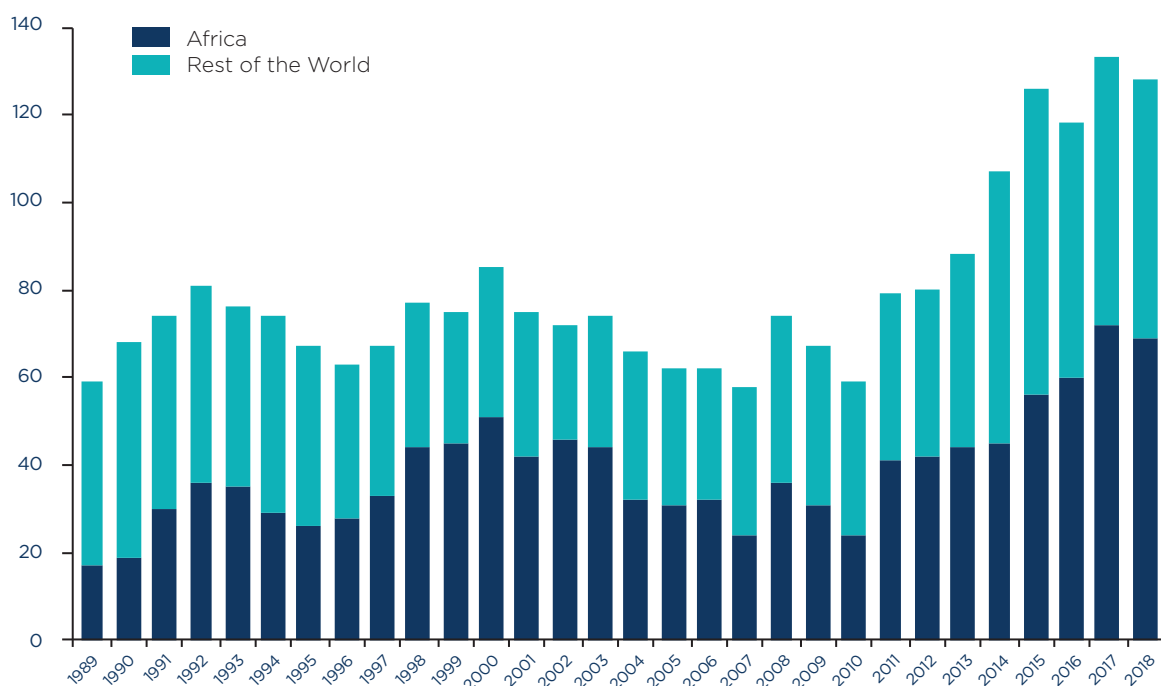
Often described as a continent prone to conflict and terrorism, data from the indices compiled by Coface confirms this. In the 2019 version of the Conflict Risk Index, 25 of the 45 African countries evaluated⁹ have a non-zero score. In total, only 52 countries in the world are in this situation. African countries therefore contribute to the overall upward trend (**Chart 3a**) in global conflicts. The increase in conflicts on the continent is driven in particular by those that do not involve a state. At both global and continental levels, this type of conflict has tripled since the beginning of the decade, but is nevertheless increasing more rapidly in Africa. The region is therefore, by far, the region with the largest number of non-state conflicts. The proliferation of clashes between armed militias in Libya, the CAR and the DRC contributes to this trend, as do clashes between Oromo and Somali in Ethiopia, and between Berom farmers, Christians, and Fulani herders, Muslims, in the Plateau State of Nigeria (**Insert 2**).

While the increase in the number of non-state conflicts is remarkable, it should not overshadow those involving a state, which have also surged over the past five years, mainly due to the fight against armed Islamist groups, including those affiliated

to the Islamic State (IS). This is particularly the case in the Sahel and around Lake Chad, justifying the place of Nigeria, Mali, Chad and Niger as the countries with the highest conflict scores (**Table 1**). In 2018, Egypt and Libya were also engaged in conflicts against IS. In addition, among the highest scores on the continent is also Cameroon, where clashes in the English-speaking regions between the army and the defence forces of the self-proclaimed Republic of Ambazonia intensified during an election year that saw President Paul Biya win a seventh term. In Sudan, the struggle between government forces and resistance movements in the conflict areas united within the Sudan Revolutionary Front continued in the country, and notably testifies to the still precarious security situation in Darfur.

In addition, with the increase in the number of organized non-governmental armed groups targeting civilian populations, the increase in the number of conflicts is concomitant with the increase in terrorist acts in Africa. It is therefore unsurprising that among the 25 countries with a conflict score above the minimum threshold of 0%, 24 also have a non-zero terrorism score (the exception being Eritrea).

Chart 3a:
Number of conflicts: Africa vs. Rest of the World



Source: Uppsala Conflict Data Program (UCDP), Coface

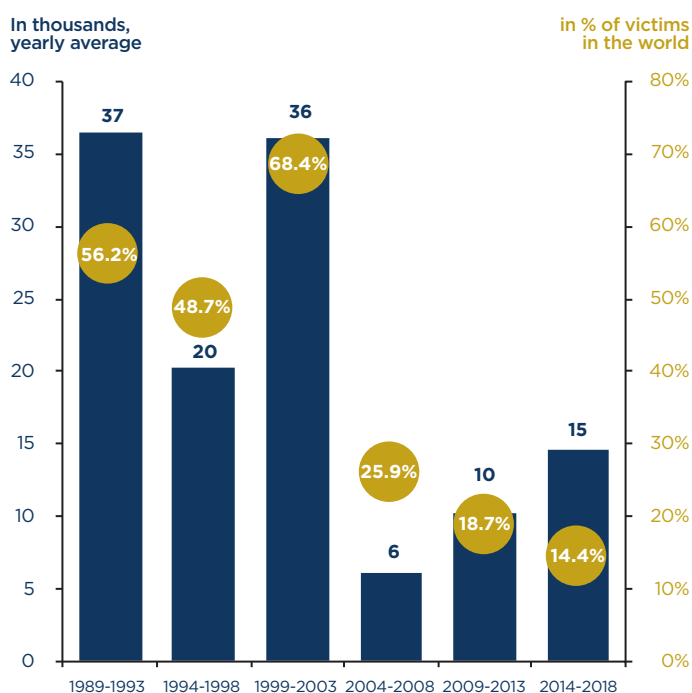
⁹ The following nine countries do not have an assessment: Comoros, Eswatini, Gambia, Guinea-Bissau, Equatorial Guinea, Lesotho, Seychelles, Somalia and Southern Sudan.

Table 1:
Top 10 African countries with the highest conflict index score and their terrorism index scores

Country	Conflict index		Terrorism index	
	Score	Rank	Score	Rank
Libya	100%	1	74%	2
Central African Republic (CAR)	91%	2	57%	9
Democratic Republic of the Congo (DRC)	87%	3	65%	6
Nigeria	86%	4	84%	1
Mali	74%	5	66%	4
Cameroon	51%	6	58%	8
Sudan	45%	7	65%	5
Egypt	45%	8	73%	3
Ethiopia	45%	9	43%	14
Niger	43%	10	42%	15

The sharp increase in the number of conflicts on the continent since the beginning of the decade has been accompanied by an increase in the number of victims associated with them: as shown in **Chart 3b**, there were on average just under 15,000 victims in Africa per year, during the period 2014-2018, almost three times as many as between 2004 and 2008. In contrast, the average number of deaths from conflict over the last five years remains half that recorded in the 1990s, when it exceeded 30,000 deaths per year. At the same time, Africa's contribution to the record level of victims in global conflicts is weakening, dwarfed by the conflicts in Syria (23% of the world's conflict victims between 2014 and 2018) and Afghanistan (19%), which have proved more deadly than all conflicts combined in Africa.

Chart 3b:
Conflicts-related deaths in Africa



Source: Uppsala Conflict Data Program (UCDP), Coface

Insert 2 :

Nigeria: political risk in all its forms

On February 23, 2019, nearly 73 million Nigerian voters were called to vote for their new president. Four days later, the Independent National Electoral Commission (INEC) confirmed the re-election of incumbent President Muhammadu Buhari. Our model highlights that he has begun its second four-year term in a political context precarious in many respects.

Nigeria's conflict index, which was below 30% until 2009, jumped with the advent of Boko Haram, reaching 100% in 2015- a score that did not decline until 2018, when it fell to 85%. The country has also had the highest terrorism index score on the continent since 2012. As a consequence, almost four years after President Buhari's statement that Boko Haram was "technically defeated", indications derived from our terrorism and conflict indices suggest that, although now fragmented into several disparate factions, the Islamist group has maintained a dangerous strike force, killing more than 18,000 civilians between 2009 and 2018. The decline in the Coface indices reflects a relative decrease in the intensity of the Boko Haram group's activity. However, in Nigeria, although some conflicts do not directly involve the state, they are still located within the country itself. Ethnic and religious divisions, particularly between the Muslim north and the Christian south, is a source of much friction between communities, particularly in the centre of the country, and can lead to the outbreak of deadly conflicts. The resurgence of tensions in the Plateau State between Berom farmers (Christian) and Fulani herders (Muslim) has contributed to the rise in the conflict and terrorism index score. In 2018, clashes between the two ethnic groups resulted in nearly 300 deaths.

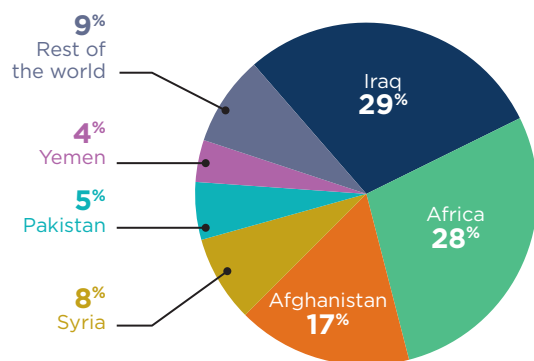
Nigeria also has a relatively high political and social fragility index score at 59%, after peaking at 61% in the previous year. In addition to the fragility of the institutional, social, ethnic and religious structure, this score is linked to the economic crisis following the 2014 oil counter-shock, with the country recording its first recession in 25 years (in 2016). As a consequence, gross domestic product (GDP) per capita has not increased for four years, and with Coface's growth forecast for 2019 (2.3%), a fifth consecutive year seems likely. The crisis is reflected in a record level of unemployment (23.1% at the end of the third quarter of 2018) and inflation above 10% for more than three years. Therefore, in addition to insecurity, the issue of living standards in Nigeria - which is already one of the countries with the highest number of people living below the poverty line - will therefore be one of the major challenges of President Buhari's second term. At the end of a first mandate with very contrasting results, the patience of Nigerians towards the one who inherited the nickname "Baba Go Slow" by his detractors (who blame him for the slowness of the implementation of reforms) could quickly run out.

In contrast, over the past five years (2013-2017), more than 28% of terrorist victims have been killed on the African continent, an increase of 10 percentage points over the previous period. Nevertheless, again, a handful of countries – mainly in the Middle East (Iraq, Yemen, Syria) and South Asia (Afghanistan and Pakistan) – are far more affected by terrorism (**Chart 4a**).

In Africa, terrorist activity by Islamist groups dominates, particularly in conflict areas: in the Sahel¹⁰, as well as in Libya and Egypt. Nearly 60% of the victims of terrorism in Africa are

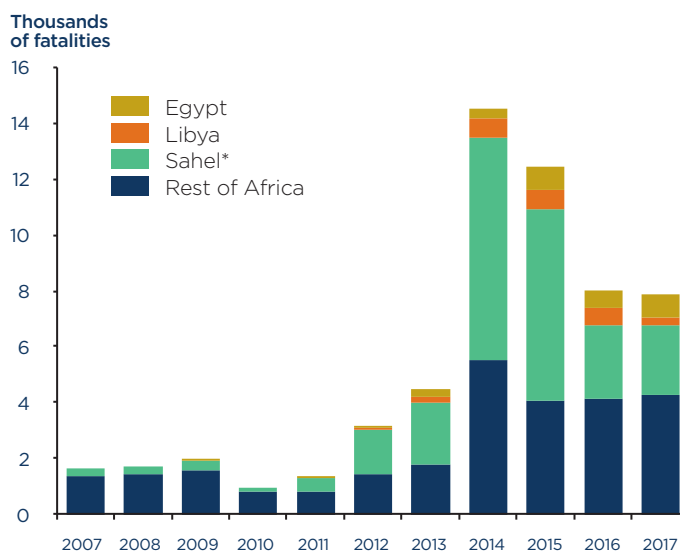
concentrated in these eight countries (**Chart 4b**). Kenya and Mozambique, with scores of 62% and 44% respectively, also rank in the first quartile of the riskiest countries in our index, mainly due to the activity of Islamist terrorist groups (al-Shabaab in Kenya and Ansar al-Sunna in Mozambique). Finally, in addition to Cameroon, which is particularly affected by Boko Haram's incursions into the Far North, the presence of CAR and DRC among the ten riskiest countries in our index provides additional examples of how conflict and terrorism regularly go hand in hand on the continent.

Chart 4a:
Terrorism-related deaths in the world



Sources: Global Terrorism Database, Coface

Chart 4b:
Terrorism-related deaths in Africa 2007-2017



*The Sahel countries include the countries involved in the G5 Sahel force (Burkina Faso, Mali, Mauritania, Niger, Chad), as well as Nigeria.

Sources: Global Terrorism Database, Coface

Map 1 highlights all these dynamics, and notably the high geographical concentration in a few risk areas. It also displays the insecurity in the Sahel (particularly in the Lake Chad region), the impact of the Somali security challenge on Kenya, and also the tensions in Kivu and the Kamwina Nsapu insurgency in the DRC. The map shows that conflicts on the African continent are generally relatively localised: an increase in conflicts does not necessarily imply an increase in the geographical extent of the conflict.

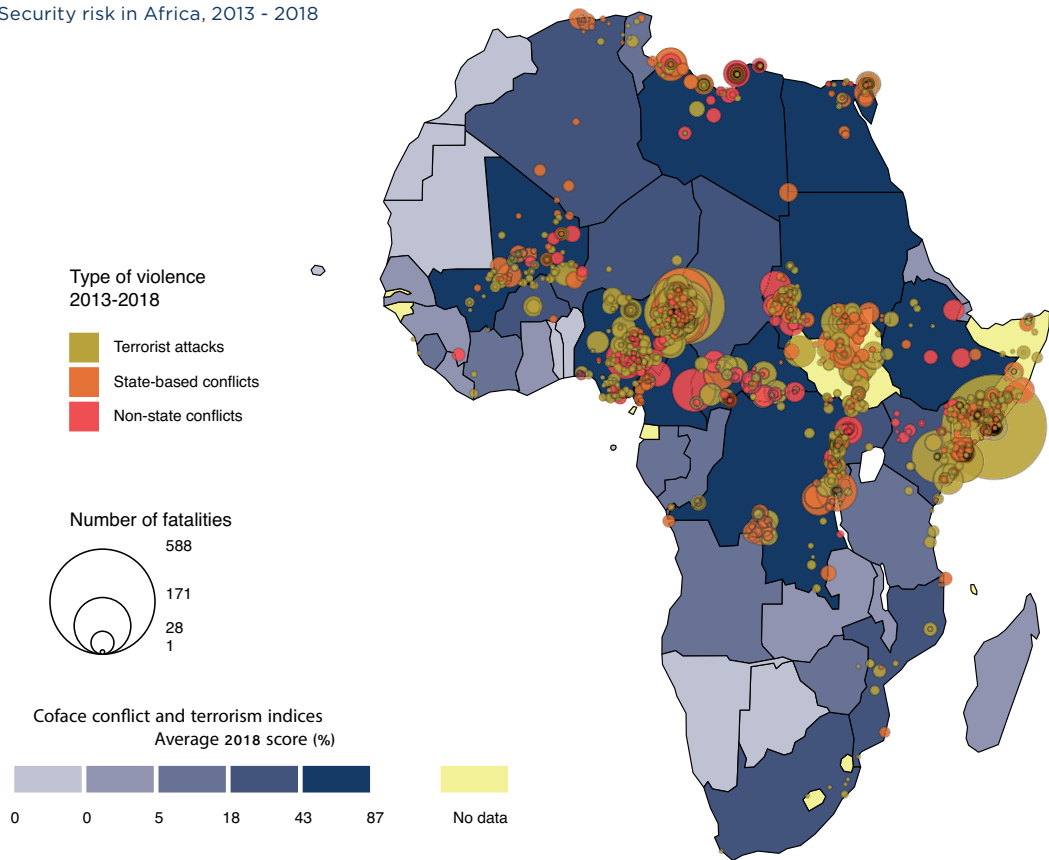
In addition, the map highlights areas where risk is low. Southern African countries are mostly spared, with the notable exception of South Africa, where political assassination attempts drive up the score. More surprisingly, unlike its peers in the G5 Sahel force, Mauritania's score remains at 0%, having not experienced a terrorist attack on its territory since 2011. With a score of 1%, Morocco justifies its status as a "safe country" in the region¹¹.

Although instructive, the risk indices of conflict and terrorism, based on past observation, offer only a vision of extreme episodes of violence. However, political risk is also about understanding the moments of disruption that lead to a profound change in a country's political structure.

¹⁰ The countries considered as from the Sahel are the countries involved in the G5 Sahel force (Burkina Faso, Niger, Mali, Mauritania and Chad) and Nigeria.

¹¹ Spared by jihadist attacks since 2011, Morocco could nevertheless see its score increase in the next edition of the terrorist risk index after the death of two Scandinavian tourists in the High Atlas in the name of IS last December.

MAP 1:
Security risk in Africa, 2013 - 2018



Data for terrorist attacks ends in 2017.

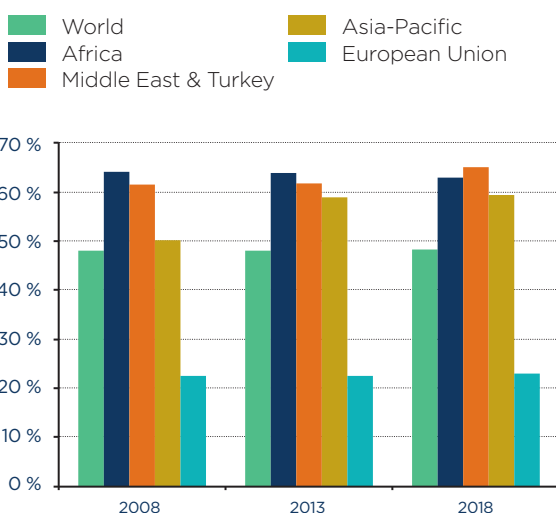
Sources: Uppsala Conflict Data Program, Global Terrorism Database, Coface

2 HIGH SOCIAL RISK, PERSISTENT FRAGILITIES: AFTER THE ALGERIAN AND SUDANESE SPRINGS, WILL TENSIONS BLOOM IN SUB-SAHARAN AFRICA?

The Coface Political Risk model is based on the assumption that cracks in the foundations of the political system – which may be related to the nature of the regime, the design of institutions, the degree of political freedom and the cohesion of the population – expose a country to a risk of popular movement and/or destabilisation of the regime. While democratic practice, at least in its electoral dimension, has become widespread on the African continent since the early 1990s, some recent examples – starting with the DRC, Sudan and Algeria – show that it is not necessarily accompanied by a solid political and institutional framework.

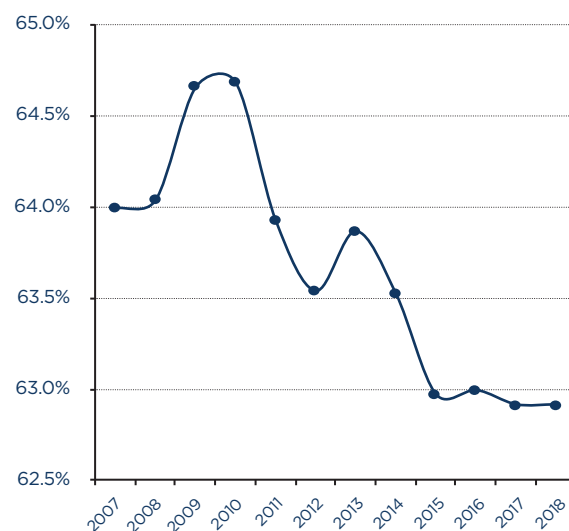
Furthermore, the Coface political fragility index indicates that the average score in Africa was 15 points higher than the world average. The African continent is only two points behind the Middle East (Chart 5a). This substantial difference with the rest of the world is rooted in relatively weak institutional environments in many countries

on the continent, a sometimes limited political offer (despite the organisation of *de jure* multi-party elections), a limited space for expression, and an ethnic, linguistic and/or religious fractionalization of the population that may fuel political tensions. For example, in terms of these indicators, Eritrea stands out at the top of the 2018 ranking (Table 2). In addition to the significantly higher average, it can be noted that only six countries have a score below the world median (Botswana, Mauritius, Madagascar, Sao Tome and Principe, Cape Verde and Tunisia), indicating widespread fragility in Africa. Despite this relatively high level, it is also worth noting the near two-point improvement in the continent's average score between 2010 and 2018 (Chart 5b). This is the result of the significant improvement in some countries, particularly Côte d'Ivoire post-electoral crisis of 2010-2011 (from 97% to 65%), Tunisia post-revolution (from 45% to 16%) and Burkina Faso post-Compaoré (from 73% to 63%).

Chart 5a:
Average score of Coface's fragility index,
by selected region

Source: Coface

Nevertheless, as our study already indicated in 2017, these political weaknesses alone do not necessarily materialize in risk. The social risk indicator, which makes it possible to understand the emergence of popular movements, by linking pressures for change with instruments facilitating popular mobilisation, can be one of the triggering factors. The recent Sudanese case illustrated, for instance, how this type of socio-economic pressure, under certain conditions, could turn into political change: the government's decision to triple bread prices in 2018 to cope with the economic crisis (collapse in the value of the currency, continued depletion of foreign exchange reserves and inflation above 70%) was the trigger for the demonstrations that ended the 30-year rule of Omar al-Bashir. The Coface social risk indicator had, prior to the outbreak of this crisis, pointed out Sudan's vulnerability to this type of popular movement. In addition to having the second highest score, after Libya, the country also recorded an increase of nearly 9 points in this indicator (from 62% to 71%) between 2008 and 2018.

Chart 5b:
Evolution of the average fragility score in Africa

Source: Coface

More generally, in Africa, the social risk index is, on average, at its highest level since the 2010 peak, which preceded the popular movements of the "Arab Spring". However, unlike in 2010, it is also evident that the instruments of mobilisation, much more than the pressures for change, are experiencing an almost uninterrupted acceleration (Chart 6).

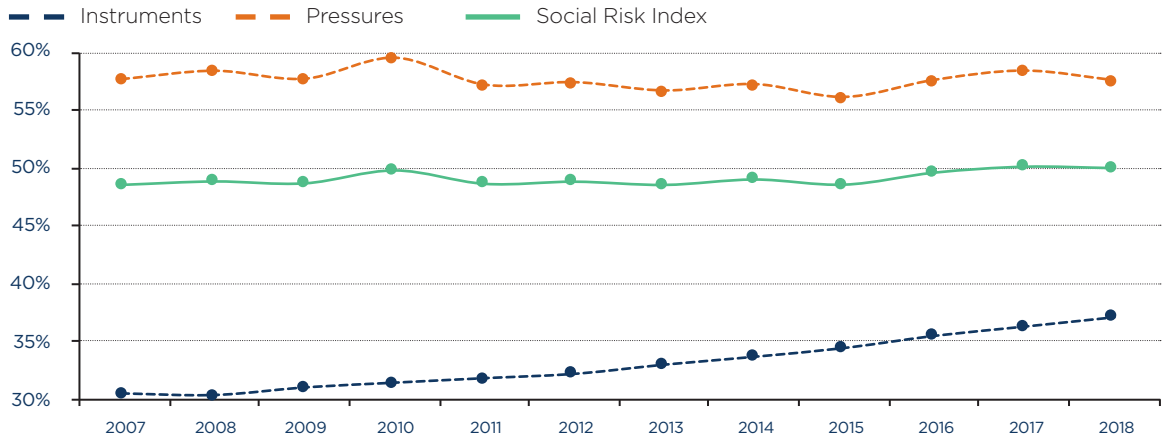
In terms of country-by-country data, almost all countries on the continent, with the exception of Eritrea, Libya and Chad, have seen their mobilisation instrument scores increase. For example, Djibouti experienced an increase of 20 percentage points between 2008 and 2018, Ghana by 15, South Africa by 12, and Cameroon by 11. While most indicators contribute to this increase in the power of mobilisation instruments on the continent, the increase in internet access can be particularly noted. Indeed, recent events in Algeria and Sudan have further highlighted the importance of social networks in mobilising people. Moreover, as recent examples show (DRC, Gabon, Sudan, Benin...), some governments, arguing the need to preserve public order, decide to cut off the internet when the political climate becomes tense. Urbanisation and the growing proportion of the population with access to tertiary education are also contributing to the overall increase in instrument scores on the continent.

Unsurprisingly, the ranking of the block of mobilisation instruments is dominated over the 11 years of observation by the five North African countries (Algeria, Egypt, Libya, Morocco and Tunisia). In sub-Saharan Africa, despite the progress recorded, only Mauritius, Cape Verde, Gabon and South Africa have "instrument" scores above the world average (Chart 7a) for this indicator. On the other hand, 80% of the 45 countries on the continent have "pressure" scores above the average of global pressures (Chart 7b).

Table 2:
Top 10 African countries with the highest fragility index score

Country	Fragility index	
	Score	Rank
Eritrea	91 %	1
Democratic Republic of the Congo (DRC)	88 %	2
Cameroon	87 %	3
Republic of the Congo	87 %	4
Chad	86 %	5
Ethiopia	85 %	6
Angola	82 %	7
Uganda	81 %	8
Central African Republic (CAR)	79 %	9
Gabon	78 %	10

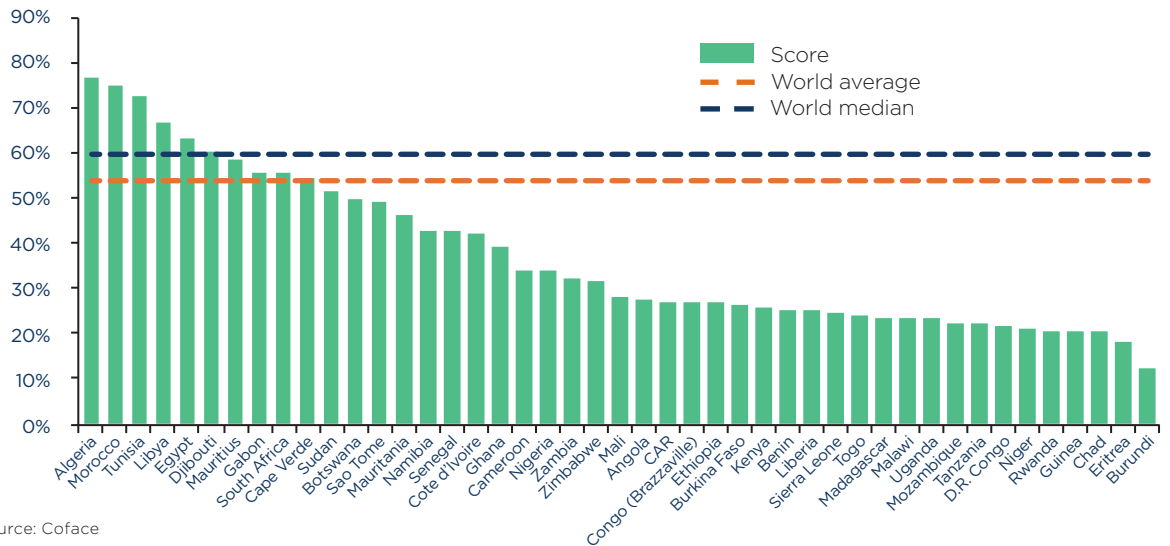
Chart 6:
Evolution of the average social risk index in Africa and its two constituent blocks, 2007-2018



Note: The social risk index is made up of two blocks: "Pressures" and "Instruments". The weight of these two blocks depends on the "Pressures" score. Indeed, it is believed that the greater the pressure of political instability, the more the instruments will promote an increase in political instability.

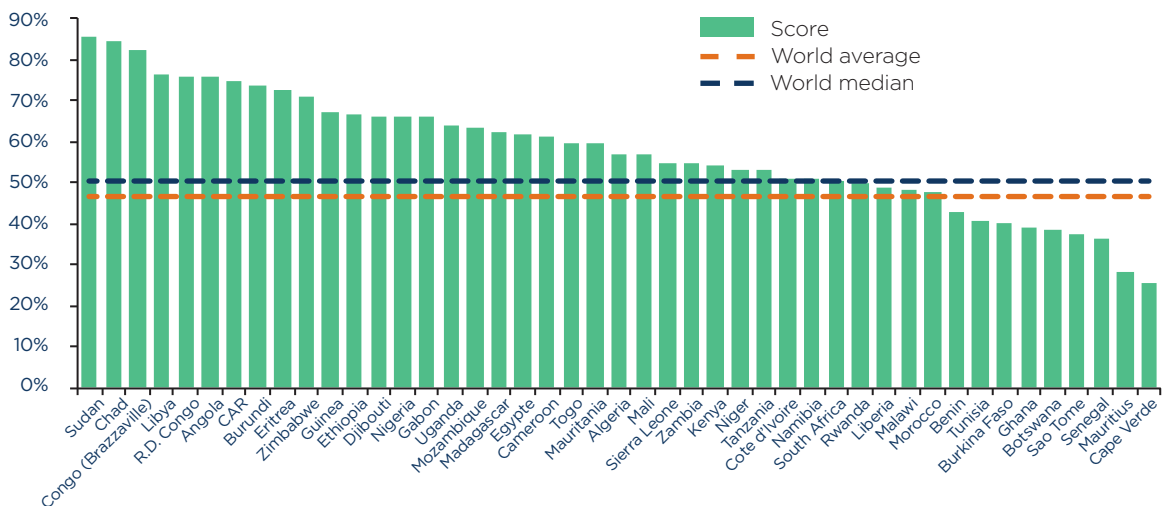
Source: Coface

Chart 7a:
Score of the "instrument" block of the Coface social risk index for African countries (2018)



Source: Coface

Chart 7b:
Score of the "pressures" block of the Coface social risk index for African countries (2018)



Source: Coface

Thus, it would be this lack of mobilisation instruments that would essentially be at the root of a social risk that would not systematically materialize in sub-Saharan Africa. Nevertheless, the progress made in this area could be enough to create some unrest. The Top 10 countries in our global social risk indicator already highlight many of the countries where risk has already materialized: in addition to Sudan, mentioned above, the demonstrations calling for a change in the political class in Algeria, those following the rise in fuel prices in Zimbabwe and the attempted coup d'état in Gabon are evidence that the high risk level of our index can transform into destabilisation. It is therefore not surprising that the overall social risk indicator is still largely dominated by these countries (**Table 3**). Libya remains in first place on the African continent, as it has done since 2007. More than eight years after Muammar Gaddafi's fall, socio-economic conditions remain precarious, fuelled by the political and security instability that has plagued the country since then. Despite the overthrows of Hosni Mubarak in 2011 and Mohamed Morsi in 2013, Egypt's score also remains at a high level. The stabilisation of the economic situation since 2016 and the start of the IMF programme have not particularly eased the pressures, which remain at a level similar to that reached in 2009 and 2010. Difficulties of access to the labour market and high inflation are some of the potential elements of exasperation towards an executive power that should be part of the long term, particularly after the constitutional revision, adopted by referendum (last April), which extended President Abdel Fattah al-Sissi's mandate and will allow him to run for a third term in 2024.

Table 3:
Top 10 African countries with the highest social risk index score with the score of the two constituent blocks "pressures" and "instruments".

Country	Social risk index		Pressures		Instruments	
	Score	Rank	Score	Rank	Score	Rank
Libya	73%	1	76%	4	67%	4
Sudan	71%	2	86%	1	51%	11
Djibouti	64%	3	66%	13	61%	6
Algeria	63%	4	57%	23	77%	1
Gabon	62%	5	66%	15	56%	8
Egypt	62%	6	62%	19	63%	5
Angola	59%	7	82%	4	27%	24
Congo	59%	8	82%	6	27%	26
Zimbabwe	59%	9	76%	10	32%	22
Chad	57%	10	84%	2	20%	43

Nevertheless, beyond identifying countries where the risk has already occurred, the political and social fragility index which combines the scores of the two indices described above, can potentially indicate which countries to monitor in the near future. To identify these countries, we used two criteria:

- 1) an above-average political and social fragility score in Africa in 2018 (55%);
- 2) a score that increased by at least two percentage points between 2008 and 2018

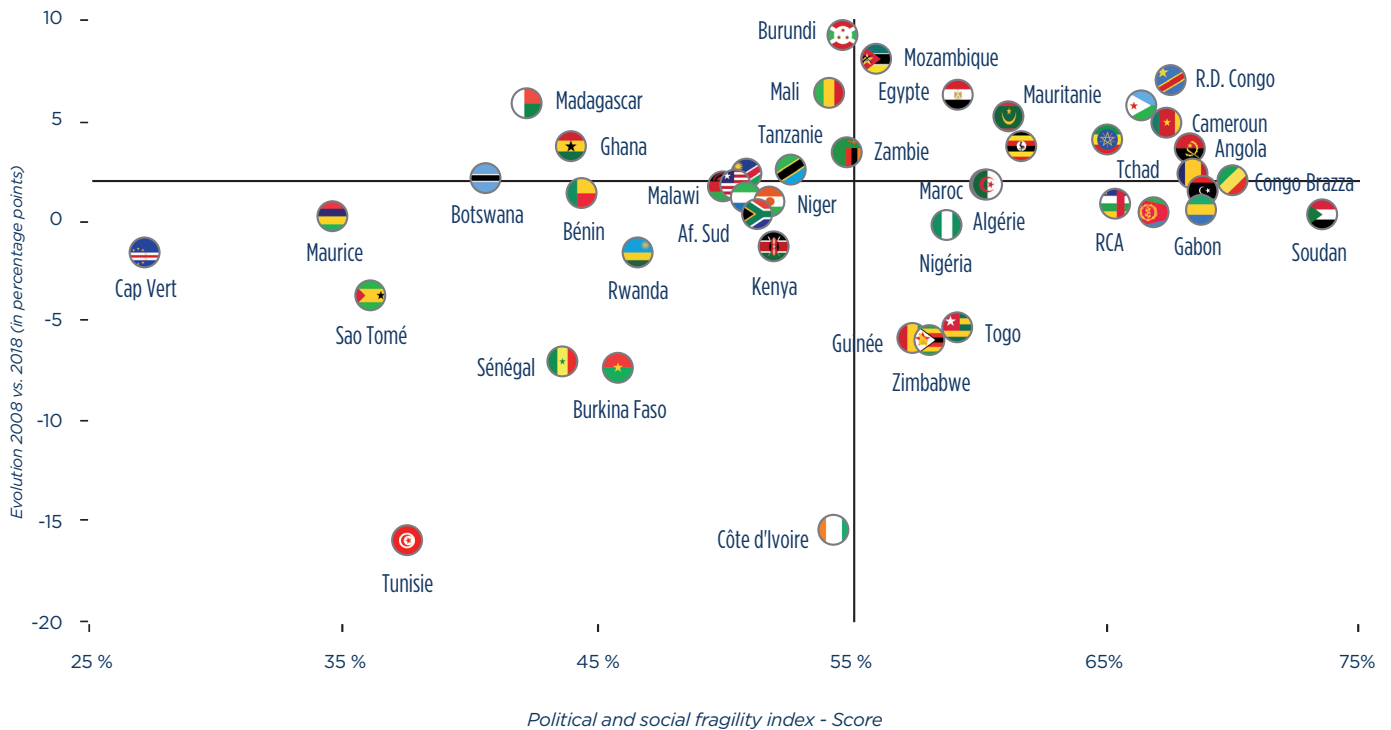
The ten countries identified, which are in the top right-hand quarter of **Chart 8**, are: Angola, Cameroon, Chad, Djibouti, Egypt, Ethiopia, Mauritania, Mozambique, Uganda and the DRC.

Some of these countries have already experienced major changes. In addition to Egypt, mentioned above, Angola and Ethiopia, which experienced a change of executive in 2017 and 2018 respectively, are still in our category of countries to watch. Despite the reforms undertaken by President João Lourenço (Angola) and Prime Minister Abiy Ahmed (Ethiopia), the economic crisis following the fall in oil prices in Angola and the persistence of the ethno-socio-political tensions that had already led to Hailemariam Desalegn's departure in Ethiopia maintain a high level of risk. Following chaotic elections, which saw Felix Tshisekedi succeed Joseph Kabila, the DRC also remains in this category. However, accusations of fraud in the elections, as well as the victory of Mr Kabila's party in the parliamentary elections, fuel suspicion that the former president continues to lead one of the world's poorest countries in the shadows.

Cameroon must also be monitored, as Paul Biya's reappointment for a seventh consecutive term in office comes in a context of increasing fragmentation of the country, linked in particular to the crisis in the English-speaking regions, and socio-economic conditions that remain precarious for a large part of the population. Finally, the presence of Djibouti, Chad and Uganda, which have in common with Cameroon to be governed by leaders whose longevity is the highest on the continent (**Chart 9**), should also be noted.

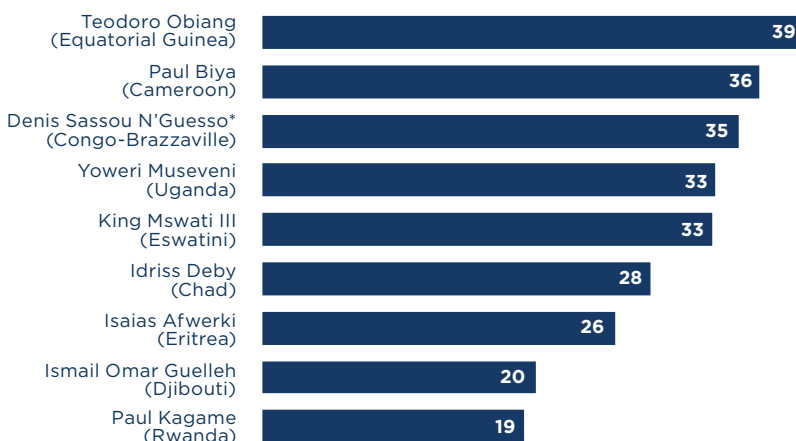
Mozambique will need to be followed closely in the coming months, with general elections expected in October. After contentious municipal elections in 2018, tensions remain high between the Mozambique Liberation Front (Frelimo), in power since 1975, and the Mozambique National Resistance (Renamo), an armed guerilla that has become a political party, threatening the peace process launched in 2016. The history of violence in the country, coupled with persistent socio-economic difficulties (following, in particular, the debt crisis and the passage of two cyclones at the beginning of the year) and the perception of rampant corruption fuel a discontent that could be expressed during these elections.

Chart 8:
Matrix of scores for the social and political fragility index and its evolution (vertical axis) 2008-2018



Source : Coface

Chart 9:
Longest rulers on the African continent (in number of years in power, as of 30 June)



* Denis Sassou N'Guesso has been in power without interruption since 1997 after having been head of state between 1979 and 1992

Source: Coface

It should be noted that the countries in the lower right-hand corner of **Chart 8**, i.e. those with high scores but no progress, have experienced episodes of political instability in the recent past. This is the case for Algeria and Sudan, as discussed above, but also for Gabon and Nigeria. Even countries with a decline over these 10 years but a score

above the African average have distinguished themselves in terms of political instability. In Togo, demonstrations challenging a constitutional reform that would allow President Faure Gnassingbé to run for two new terms in 2020 and 2025 have increased in recent years. In this category, Zimbabwe can also be added.

In the upper left corner are the countries whose scores have increased substantially, but remain below average: in Mali, security tensions could put pressure on the local political climate. In Tanzania and Zambia, voices denouncing the authoritarian shifts in the administrations of Presidents John Magufuli and Edgar Lungu testify to this fragility.

Finally, it is worth noting the countries that have slipped in the lower right-hand corner of the matrix in this graph. Tunisia and Côte d'Ivoire recorded the largest decline in their scores over the period. The Tunisian revolution of 2011 and the Ivorian crisis of 2010-2011 made it possible to deflate the fragility scores, contributing greatly to this dynamic. The same is true for Burkina Faso after the attempted coup in 2015. The elections, to be held in 2019 and 2020 respectively in Tunisia and Côte d'Ivoire, should nevertheless put to the test the consolidation of the legacy of these political crises.

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