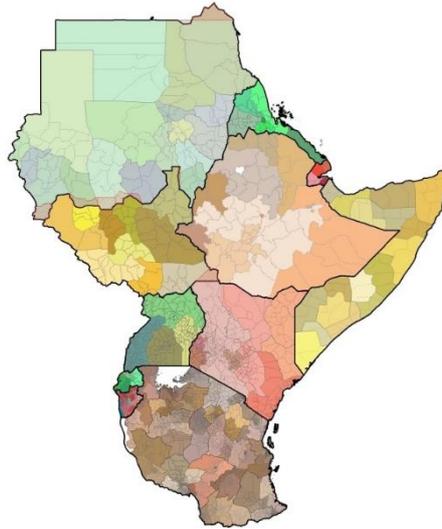


**HUMANITARIAN
AND DEVELOPMENT
PROGRAMME**

**EAST AFRICA AND THE HORN IN 2022:
An Outlook for Strategic Positioning
in the Region**

March 2017

HUMANITARIAN FORESIGHT THINK TANK



East Africa GIS data, East Africa borders file – administrative layer package

INTRODUCTION

East Africa and the Horn¹ is one of the most politically dynamic regions in the world. Almost nowhere else have geopolitical forces and regional ambitions combined to produce such volatile results. From the birth of two post-colonial states (Eritrea in 1991, South Sudan in 2011)² to the upheavals of the Cold War (the fall of Emperor Haile Selassie flipped Ethiopia from the American to the Soviet domain nearly overnight while Somali President Siad Barre took his country from Soviet to American influence shortly thereafter), from the horrors of the Rwandan genocide and Africa's Great War in DRC to the opening salvos of the Global War on Terror (with the bombing of American embassies in Dar es Salaam and Nairobi), the region may not dominate the geopolitical landscape but has often been the playing field for greater geopolitical contestation.

This volatility is not likely to change in the coming years of greater multipolarity in the international arena. The region's geostrategic location links Muslim and Christian Africa. It faces the Red Sea and is in close proximity to the Middle East as well as hosting its own homegrown Islamist insurgency, creating a mix of local and global political-security interests. The Greater Horn is also the continent's gateway to Asia, with deep historical ties to India, China, and the Middle East that reproduce themselves today in trade and investment deals. Several of the region's states are on the verge of becoming oil producers, marrying possible economic independence with the inequality and conflict that often besets oil producers. A growing middle class in Uganda, Tanzania, and Kenya is attracting increased attention not only from "traditional" partners such as the US, Europe, and China but to emerging powers including Russia, India, Saudi Arabia, Qatar, the United Arab Emirates, Turkey, Israel, South Africa, and Egypt. These new relationships will present new challenges and opportunities to the 'old guard' colonial and post-colonial powers.

Coinciding with increased international interest, East Africa's states have grown stronger over

¹ Hereafter often referred to as the "Greater Horn of Africa," comprising Sudan, South Sudan, Eritrea, Ethiopia, Djibouti, Uganda, Rwanda, Burundi, Kenya, Tanzania, and Somalia.

² One could argue for the inclusion of Somaliland, but because it is not a *de jure* state, it has been omitted.

the past several years, exerting their sovereignty in ways that challenge the post-Cold War development and humanitarian models. A trend towards increased control over and restriction of national and international humanitarian and development partners has emerged within the context of more deliberate government action meant to curtail critique in a region still very much reliant on aid for service delivery. Strong economic growth and the boon of anti-terror military aid have empowered states while channeling resources to specific interest groups in power, specifically to the executive and security sector. However, this will not guarantee stability or equitable human development over the next five years. Rather, the region may see a situation in which as more and more money pours into the system, alternate seats of power and contestation may arise, threatening not only national but regional stability, development, and integration. Strengthening the center of power could prevent non-violent political change from emerging. Ambitious leaders in the periphery may then resort to violence to unseat ruling regimes that themselves came to power as products of deeply embedded ethnic conflicts, cross-border regional power projection, and horizontal inequalities that hamstring equitable development.

East Africa and the Horn are often viewed in terms of the ‘political marketplace,’ the challenges of which could begin to lead the region down a violent path. East Africa has always had to weather changes in the international context while also managing significant local political conflicts and economic problems. The legacy of internal legitimacy deficits co-exists within an international context that often undermines the development of local solutions. While regional integration has increased regional stability and the level of cross-border interference has declined, the future is anything but certain, as international, regional, and national forces strain the ability of national and regional institutions to regulate and manage non-violent change.

METHODOLOGY

The methodology for this report is based on a structured analytic toolkit in which country teams and regional experts identified key drivers of change in the region over the next five years. These drivers were charted relative to one another in two categories – impact on the system and uncertainty in terms of evolution.

Those drivers deemed highly impactful and highly certain are **heavy trends**, their evolution relatively known (i.e. demographics, urbanization, climate change, etc.). Drivers that were both medium/high impact and uncertainty were subjected to Impact Matrix Cross-Reference Multiplication Applied to a Classification (MICMAC) analysis to determine relative influence and dependence of each driver.

The most highly influent **key drivers** were chosen for further analysis and revealed a strong bias towards outside factors impacting on the region – **Global Spheres of Influence, Commodity Price Fluctuations, Changing Development Landscape**, and the **Global War on Terror**. Within the region, **Interstate Rivalries** and **Competing Infrastructure Projects** proved to be factors for both unity and division. The only national driver identified to have a serious impact on the region was **Kenya’s Electoral Climate** and possible related violence, both in 2017 and 2022.

Several hypotheses were built up for each major driver with input from regional experts. These hypotheses represent the various paths that each individual driver could take over the next five years. Hypotheses for each driver were then combined in narratively coherent ways to build the final scenarios included at the end of this report.

KEY ASSUMPTIONS

The following key assumptions provide the underlying theoretical foundation to this project at large. These are here explicated to orient the reader in order to better critique the analysis and adapt it to suit specific strategic needs.

Turbulence – This term “refers to the way in which a system is unpredictable and chaotic from one moment to the next, lacking discernible pattern, [while] still maintain[ing] a recognizable structure over a longer period of time.”³ In other words, tactical noise often seems to distract from the movements or inertia of larger-scale strategic change. Underlying this analysis is the belief that the more that changes, the more that stays the same, i.e. that history and past action are guides to current events.⁴ Geography, history, and culture are often powerful limiting factors channeling change and strategic options of actors in the region.

Politics as Enterprise – Facing both the Middle East and Asia, it is little surprise that politics in the greater Horn of Africa region is largely determined by trade and exchange. The conduct of politics at all levels often resembles a system of governance in which the exchange of political services or loyalty for payment or license is essential to the accumulation of political and economic power.⁵ Though political leaders throughout the region may demonstrate several different business models, they all operate within a political marketplace that is highly sensitive to changes in financing and control.

The Coming Multipolarity – After the Cold War, Western political theory viewed the United States as the supreme ruler in a unipolar world that some saw as ‘the end of history.’ This has proven to be a false harbinger of greater stability and was never particularly true for East Africa. Since 2000, the United States has shared the region with China, splitting interests between America’s military-industrial security sphere and China’s economic and trade relations. China’s rise has been integral to East Africa’s development and other states are now projecting powers in ways that challenge “American hegemony.” India, the Gulf States, Turkey, China, Russia, and even the EU have all shown greater interest in the region and each has different objectives that may complement or contest American and Chinese dominance.

Action/Reaction – Though East Africa and the Horn are highly sensitive to these greater geopolitical movements and the influence of realist power politics and control, this does not mean that states have been disempowered. Rather, governments in the region have always and will continue to adjust their policies and practices to take advantage of prevailing geopolitical

³ De Waal, A 2015, *The Real Politics of the Horn of Africa: Money, War and the Business of Power*, Cambridge Polity Press, p. 17.

⁴ “Turbulence gives rise to the standing joke about Sudanese political life: it changes from week to week but if you come back after ten years it is exactly the same.”, *ibidem*.

⁵ *Ibid.*, p. 16.

winds. Long-standing leaders, who have survived and taken advantage of global upheavals including the end of the Cold War, the opening of the Global War on Terror, and the apparent rise of populism in the West will continue to adjust accordingly.

HEAVY TRENDS

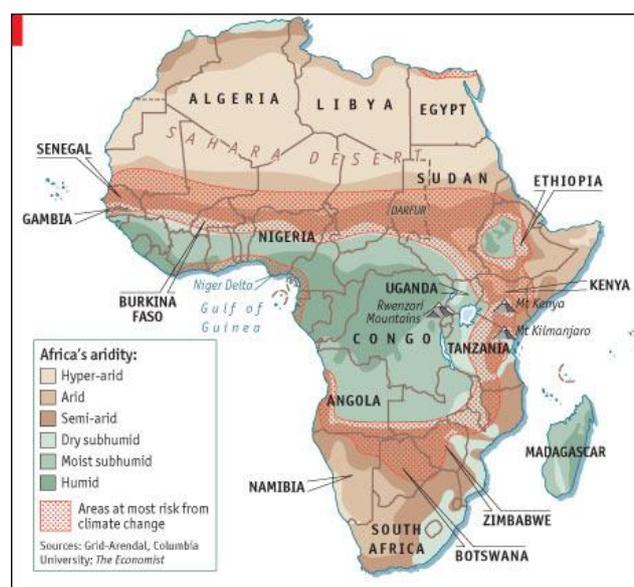
East Africa and the Horn comprise 11 states, 315m people, hundreds of ethnic groups, dozens of climatic zones, and various differentiated levels of human development, colonial history, modern political influences, and economic organization all covering nearly 2.4m square miles. This diversity and variability make studying the region as a whole exceedingly complex, from the mountainous desert autarkic autocracy of Eritrea to the highland plateau of Ethiopia's single-party developmental state, from the Rift Valley savannahs of Kenya's capitalist democracy to the economic anarchy of Somalia's coast there is no simple way to discuss the region as a whole.

However, there are a number of trends that hold true across the region and bind it together. Transnational problems like climate change will need to be tackled on a regional and global level, while high population growth rates and low employment opportunities put increasing pressure on cities across the region. These domestic challenges put real pressure on governments to deliver gains in human development and create opportunities for their citizens in the attempt to move into middle income status.

These heavy trends will be present in each final scenario. They consist of highly impactful drivers that are relatively known quantities and therefore important to consider in each strategic option. In addition to the short-term impact, many of these drivers will continue to have an effect on the system well into the mid-century mark.

Climate Change

East Africa is particularly vulnerable to disruptions related to a changing climate. The region's long history of alternating drought/flood cycles as well as the region's geography mean it hosts innumerable pastoral groups who have for centuries moved and adapted to climate variability. With increasing population density and development models that often posit transhumance as a problem for security and development, pastoral communities are often under threat of losing their livelihoods and in conflict with their settled neighbors. In addition, large percentages of the region's population are subsistence farmers and rely on rain-fed agriculture as their primary source of income. With climate patterns becoming more erratic across the region, drought cycles are growing shorter and rainfall more variable, severely affecting both crop production and the



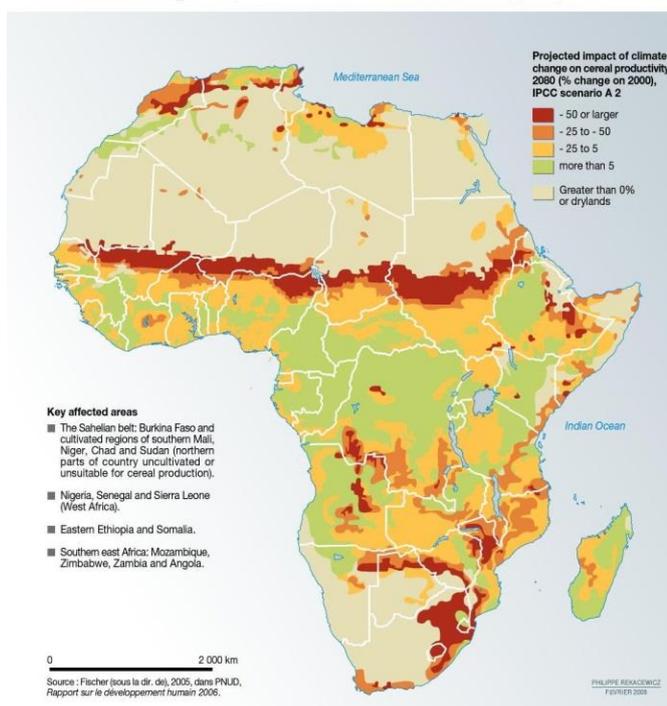
movements of pastoral groups.

It is expected that agro-ecological zones will shift and change as temperatures rise, changing not only crop productivity but introducing new pests into areas without proper safeguards. In Uganda, temperatures are expected to rise by up to 1.5°C over the next twenty years.⁶ In more arid areas, such as Eritrea, warming is expected to be even worse, with temperatures 4°C higher by 2060, well outpacing the global average.⁷ Ethiopia saw its worst drought in fifty years in 2016, and Somalia's drought cycle has narrowed even further, with severe food insecurity expected for 2017 as rainfall in the region is down 15% from historical averages.⁸

Traditional pastoral coping strategies, moving with both seasonal variation and the cyclical drought/flood cycles, are under threat from modernization on one hand and an often overbearing central state on the other. Pastoral areas often include lucrative mineral concessions in their traditional grazing lands. Livelihoods based on livestock compete with rich mineral rents from the central state and have little opportunity to capitalize production and increase income. The seasonal movements of herds can make service provision, often based on settled communities, difficult and expensive for states, increasing inequalities and impoverishing groups that cannot transition to modern livelihoods.

Drought isn't the only danger. Rising sea levels will threaten coastal settlements in Kenya, Tanzania, Eritrea, Somalia, and Djibouti. The Intergovernmental Panel on Climate Change has predicted between 18 and 59 cm sea level rise by 2100. Mombasa, on the Kenyan coast, could lose 17% of its area with a 30 cm sea level rise.⁹ With the majority of its population around the capital Djibouti City, the country is in danger of rising sea levels polluting its aquifers and leading to salinization. It is predicted that in Tanzania, a 2°C rise in global temperatures could see 5 to 19 centimetres of land lost to rising sea levels.¹⁰ In Dar es Salaam, the country's biggest city, it is estimated that 8% of the city's land area could be at risk, affecting

Cereal productivity in Sub-Saharan Africa under a scenario of the IPCC that shows CO₂ atmospheric concentrations a level at 520-640 ppm by 2050



⁶ Hepworth, N, & Goulden, M 2008, *Climate Change in Uganda: Understanding the implications and appraising the response*, LTS International, Edinburgh, 10 November 2008.

⁷ Fikrejesus, A 2016, 'Eritrea: Coping with Climate Change', *Madote*.

⁸ Heaton, L 2016, 'Somalia's climate for conflict: Introduction', *The Ground Truth Project*, 11 November 2016.

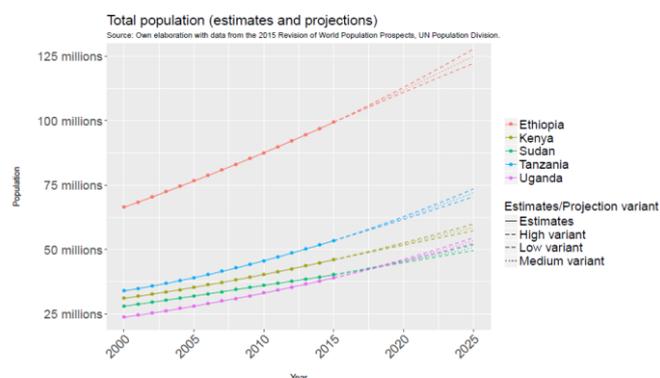
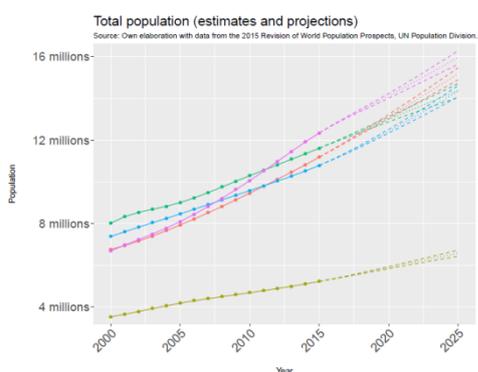
⁹ We Adapt 2011, 'Overview of climate change in Kenya', 30 March 2011.

¹⁰ Freire, ME, Lall, S, & Leipziger, D 2014, *Africa's Urbanization: Challenges and Opportunities. The Growth Dialogue*, Working paper n°7.

140,000 people and more than \$170m in economic assets.¹¹ Though East Africa is often only on the radar for damages to agricultural and livestock productivity, there are threats at the national and district level for which governments must prepare.

Though nothing like the dangers to low-lying, heavily-populated countries like Bangladesh, climate change nevertheless presents an existential threat to the millions of subsistence farmers and pastoralists across the region. Like elsewhere in Africa, the burden of climate change will be borne by states that produce very few of the greenhouse gases that are contributing to global warming. As such, East Africa and the Horn have few options but to attempt to adapt to the inevitabilities of climate change and a warming world.

Demography



Sub-Saharan Africa has one of the quickest growing populations in the world. East Africa is no outlier to this trend. Tiny Djibouti is the only state in the region whose population growth rate is below two percent. The majority range between 2.2 and 2.6% with Tanzania, Uganda, Burundi, and South Sudan all above 3% population growth per annum. From 2005 to 2015, Ethiopia gained 22.8m new citizens, Tanzania 14.4m, Kenya 10.7m, Uganda 11m, and Sudan 8.24m. Increased population puts a strain on health and education services, land, and natural resources while also creating challenges for growth.

Although a large labor pool often presents an economic benefit in terms of demographic dividend, the region has little ability to integrate labor into industry and guarantee employment, leading to inefficiencies and potential unrest, especially amongst underemployed youth. It also threatens the gains made by strong economic growth. Most countries in the region must maintain strong growth of 5% or better in order to make even moderate gains in income per capita, which is one of the strongest indicators for overall human development.

Most countries in the region are not expected to make a demographic transition¹² until mid-century. Ethiopia's population will reach 117m by 2022, but if trends hold, the country is expected to double its population in 25 years. Tanzania's population is expected to double over the same amount of time as well, reaching 66m by 2022 from 56m in 2017. Kenya's population is expected to reach 54.7m from today's current 48.4m, and Uganda will add 7.3m people in five years based on current projections.

¹¹ Makoye, K 2012, 'Rising Tides Threaten Coastal Towns', *Thomson Reuters Foundation*, 23 March 2012.

¹² The transition from high birth/death rates to low birth/death rates often linked to economic development and the transition from a pre-industrial to an industrial economic system.

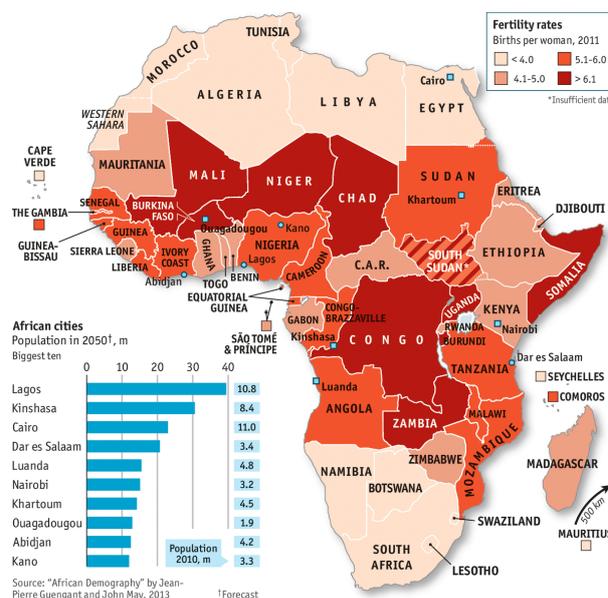
Urbanization

Alongside the growth of population throughout East Africa and the Horn is the movement of larger populations from rural to urban areas. There are numerous problems associated with the move to cities that have been called “crowded, disconnected, and costly.”¹³

Governments in Africa have not properly invested in infrastructure, industry, commercial space or affordable housing. This is perennially true since the colonial era. Transport systems are weak, so although urban density should increase labor accessibility, workers often cannot efficiently reach jobs or opportunities. Meanwhile, African cities are expensive, both for local workers and for local companies, and most of the continent’s urban economies deal in non-tradable goods and services, making the development of cities and urban economies exceedingly difficult.¹⁴

Across the region, urbanization is increasing, but in different ways. In Sudan’s Darfur Region, for example, the urban population share has jumped from 20% in 2003 to over 50% in 2017,¹⁵ due mostly to conflict and displacement. Tanzania has traditionally had lower rates of urbanization that now look to be accelerating. The population of Dar es Salaam rose by over 2m people in ten years, from under 3m in 2005 to 5.1m in 2015. In Uganda, the Central Region has long been the most urbanized, but the Eastern Region has been urbanizing faster in the first decade of the new millennium, and in Ethiopia, the Central Statistics Agency projects that urban populations will triple by 2034.¹⁶

The high rate of movement to cities, however, is not the whole story. Despite this urbanization trend, East Africa’s rural population is still growing. Lower income countries, in sub-Saharan Africa still have high rural population growth rates (average of +2.1%) in addition to high urbanization rates, which makes sense as the continent has some of the highest population growth rates in the world.¹⁷ Urban expansion inevitably spills over into agricultural land, where peasants generally have poor title and must compete with powerful state interests. This has, for example, fuelled protests in Ethiopia between urban and rural as Addis Ababa expands into Oromo farming land. Interactions between rural and urban should be studied more in-depth to gain a proper understanding of the challenges and opportunities for development with such high urbanization rates.



¹³ Lall, SV, Henderson, JV & Venables, AJ 2017, *Africa's Cities: Opening Doors to the World*, The World Bank.

¹⁴ Ibid.

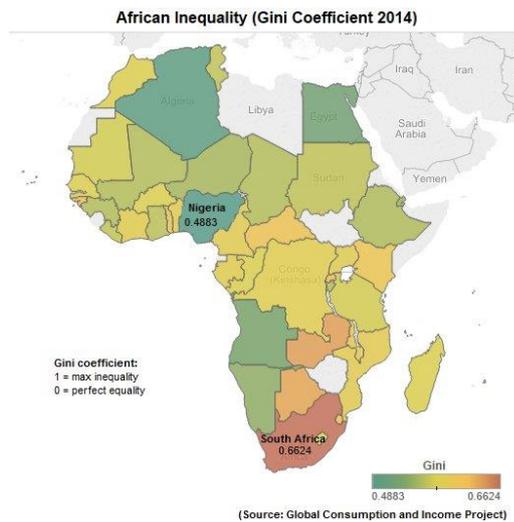
¹⁵ UNEP 2016, 'Climate for Change in Sudan', 17 March 2016.

¹⁶ Ethiopian Economics Association & PRB 2015, *The demographic dividend: An opportunity for Ethiopia's transformation*, October 2015.

¹⁷ Rafei, L 2014, 'Africa's Urban Population Growth: Trends and Projections', *The Data Blog*, 29 October 2014.

Across the region, more and more people will crowd cities, but without proper management and vision, these cities will not produce more or add value to national economies like their counterparts in Asia or Latin America. Without that leadership, cities in East Africa and the Horn will become greater and greater hives of congestion, poverty, and pollution.

Poverty and Inequality



The East African model of the development state, championed by Ethiopia, Rwanda, and, to a lesser extent, Tanzania and Uganda has been lauded for its high growth and claims to poverty reduction. However, raw numbers have often hidden regional inequalities within states, as areas more closely tied to the global economy have grown tremendously in the last decade while outlying and periphery areas remain in relatively the same state of development that they have been in for decades.

Linking in to the urbanization heavy trend above, the capital cities in each country have grown considerably and are considerably wealthier than rural and periphery areas. Khartoum is the greatest example of this as, historically, it has always been the gateway for transferring wealth from Sudan's southern peripheries to its center. South Sudan has repeated this trend, substituting Juba for Khartoum, though the ongoing civil war has disrupted development across the country.

Uganda's north and east are traditionally less developed and have had less success at poverty reduction due in part to a history of conflict in the region. Additionally, Uganda's pastoral communities, like pastoral communities across the region, have proven harder to engage in development activities due to their transient lifestyle and inappropriate theories of change in development, such as failure to recognize the multiple contributions that livestock make to livelihoods, as well as the cultural significance of cattle in many transhumant regions of East Africa.¹⁸

Tanzania's development has always preferred the Swahili coast for the interior, and the coast remains better developed than many of the eastern regions. Similarly, the history of empire and state-led development in Ethiopia has favored the major cities over rural areas and led to ethnic tensions as the interests of the ruling party have, at times, clashed with populations who resent their displacement for an intangible greater good.

These heavy trends – climate change, demography, urbanization, poverty and inequality are structural challenges that will interact with one another over the next five years. As a result, it is integral to have a comprehensive understanding of how these issues interact and frame the scenarios at the end of this report in order to think strategically for the future.

¹⁸ Oxfam GB 2010, *Pastoralism, Demographics, Settlement and Service Provision in the Horn and East Africa: Transformation and Opportunities*, May 2010.

POLITICAL EVOLUTIONS: REGIONAL RIVALRIES & GLOBAL INFLUENCES

East Africa is one of the most complex regions in the world. Massive upheavals in the 1980s saw several new governments take power or make major gains in rebellion, the NRM in Uganda, the NCP in Sudan, the TPLF and EPLF of Ethiopia and Eritrea, and the RPF in Rwanda. The end of the Cold War, the fall of the Derg, Somalia's collapse, and the upheavals in the Great Lakes drastically redrew the geopolitical map and gave these new governments space to project power. Sudan's political Islamism gave refuge to a new breed of international terrorism. Eritrea gained its independence. A long-standing conflict in Rwanda gave way to genocide.

The war in southern Sudan was always a regional affair but became further internationalized as the leftist liberation movements of Uganda, Ethiopia, and Eritrea allied against Sudan's attempts to lead the region, supporting Sudan's southern rebels and even secretly deploying their own forces against Omar al Bashir. This alliance, with Rwanda, also helped to overthrow Mobutu and then moved against his replacement, Laurent Kabila, initiating a conflict that drew in Zimbabwe, Chad, Libya, Namibia, and both Angola's government and its rebels. These alliances were, however, inherently volatile, and by the end of the decade, Eritrea and Ethiopia were at war, Rwandan and Ugandan forces were clashing over rich mineral rents in eastern DRC, and Sudan was using ethnic cleansing to clear its oil fields for Western oil interests. The September 11 attacks on the United States changed the geopolitical calculus for the Greater Horn, as American interest returned to the region, isolating Sudan and bringing together Kenya, Uganda, Ethiopia, Rwanda, and Tanzania through generous security and development aid funding. These relationships have grown stronger over the years. Ethiopia, for example, has seen official aid rise from \$1.1bn in 2001 to \$3.6bn in 2014. Kenya has seen an even greater rise thanks to its status as a 'front-line state' in the Global War on Terror, from \$470k to \$2.67bn over the same time period, similar to Uganda from \$822k to \$1.63bn, while Tanzania has doubled from \$1.27bn to

Election 2017 – Kenya

Kenya's 2017 elections are expected to be highly contentious and may result in violence. The Jubilee Alliance was mostly predicated on its leaders banding together against ICC indictments issued for President Uhuru Kenyatta and Vice President William Ruto. Their position is now heavily contested by a shaky coalition of opposition parties, the National Super Alliance (NASA). If the alliance holds, the elections will be hotly contested, with real danger for ethnicized violence, pitting Jubilee's Kikuyu and Kalenjin against the Luo and Kamba-dominated CORD and the Lahya of the Amani National Congress. Not only is there danger at national level, but gubernatorial seats represent lucrative prizes now that power and patronage opportunities have been decentralized to the country level.

Even if Jubilee holds together and wins the day, many are already looking towards 2022, when Kenyatta's term limits force him to step down. The natural successor is the Kalenjin Ruto, who is not well-liked among the Kikuyu elite. The Kalenjin have invested substantive political capital in Kenyatta, and if this is not repaid, the fallout could be immense. But even Ruto's position within the Kalenjin is not guaranteed, as Gideon Moi, son of former president Daniel Arap Moi has already tried to take Ruto's position, backed by his powerful family in a bid to follow Uhuru Kenyatta's rule like his father followed that of independence leader Jomo Kenyatta.

\$2.65bn.¹⁹ Additionally, over the course of the 2000s, China grew increasingly influential in the region thanks to trade links and infrastructure developments; however, American and Chinese interests did not clash in any serious way, and the region has been relatively peaceful since the turn of the century.

Global Interests

This, admittedly Western, interpretation of history posits East Africa as a periphery region, where geopolitical interests are contested and help set the playing field for regional rivalries. International money and influence play a powerful role in relations between states in the region. Whoever leads the region is thus able to shape these relations and gain important political and financial advantages. In the current geopolitical climate based on American security and Chinese financial interests, those leaders are Ethiopia, Kenya, Rwanda, and Uganda.²⁰

However, East Africa is once again entering a period of flux as secondary powers look to contest American and Chinese dominance in the region. There are several drivers that have unfolded over the last five years and have shaped this growing interest.

Anti-migrant sentiments in Europe, as well as a number of high-profile terrorist incidents have increased European security and development funding for sub-Saharan Africa in general and the Horn in particular.²¹ The European Union has developed an Emergency Trust Fund for Africa, a €1.8bn pool of money for development and humanitarian projects intended to stem migration from the continent into Europe. Already, funding has been earmarked for Sudan and Eritrea,²² two countries that until recently were social pariahs in the Western world due to systemic human rights violations and support for international terrorism²³.

The ongoing war in Yemen has drawn in interest from the Gulf States, especially Saudi Arabia

The Somali Coast

A Keystone to Global Trade

Between 2005 and 2012, the Somalis proved how geostrategically important their country was in global maritime trade as piracy boomed off the coast and threatened the world's shipping routes. The Bab-al-Mandeb Strait between Djibouti and Yemen links the Gulf of Aden and the Red Sea, controlling maritime traffic between Europe and Asia alongside the Suez Canal. At its height, Somali piracy cost the global economy anywhere from several million USD in ransoms to billions in lost time, extra fuel, and increased insurance rates.

Since 2015, the Somali Coast has become the source of a different type of global interest. A contest for influence and control has been playing out between Turkey and the UAE, the results of which will not be known for years. This contest could help stabilize Somalia as it is split into zones of interest and control, or it could lead to new sources of conflict and chaos in the Horn.

¹⁹ The World Databank, *Net official development assistance and official aid received [online]*.

²⁰ This should not, however, be interpreted as these states owe their regional weight solely to outside influence and financial support. The states listed have very particular post-colonial histories that have brought them to the forefront of regional influence today. External factors are an important element that shore up legitimacy and sovereignty, but are not the primary determinant of power projection and influence.

²¹ OECD 2016, *Development aid at glance statistics by region. Africa*.

²² Rankin, J & Patrick, K 2016, 'EU Considering Working with Sudan and Eritrea to Stem Migration', *The Guardian*, 6 June 2016.

²³ European sanctions blog, *Eritrea*.

and the UAE, who have increased their military presence in Djibouti, Eritrea, and Somalia.²⁴ The Yemeni conflict itself is a proxy war between Saudi Arabia and Iran²⁵ that is having knock-on effects in the Horn. Eritrea and Sudan used to be allied to Iran but have switched their allegiance to Riyadh, much to Israel's satisfaction, as the two countries were major conduits of arms and support to Iranian proxies Hamas and Hezbollah. However, increasing influence from the Gulf has also brought Turkey²⁶ onto the scene, which has tried to balance Emirati influence through trade and security relationships all along the Somali coast.²⁷

Financially, East Africa's growing economic power has seen heavy investment from India, which is closing in on China as the region's biggest trading partner²⁸. America and Europe are still major partners in trade alongside more specialized interests, such as the Israeli market for surveillance tools and the Russian arms trade, the security sector growing as the space for civil society and opposition decreases.²⁹

Regional Rivalries

Global influences on the region are dangerous because as money and influence pour into the political marketplace, it increases the number of paths for ambitious actors to access external support, making it more difficult for the region's politicians to maintain control. The market heats up too much and may threaten a crash as too many actors vie for power and position.

The political marketplace in each country functions to the extent that actors can bargain and make alliances while simultaneously diffusing risk, typically to the institutional structure of the state, weakening its institutional core, disrupting service delivery, and centralizing power in the executive. Core state structures are hollowed out, unweaving the democratic fabric of a state, especially its legislature, judiciary, and civil society. Though regional rivalries have arguably been less intense under Sino-American dominance since 2001, a look back to the 1990s may help to elucidate the potential fractures in the region: unresolved border tensions, power projection by proxy forces, and competition/cooperation for shared cross-border resources such as the Nile.

Ethiopia's Ongoing Protests

The ongoing protests of the Oromo and Amhara peoples in Ethiopia present "one of [the] most serious challenges in 20 years." Protests started in Oromo Region in November 2015, but worsened when joined by the Amhara in August 2016. The Oromo and Amhara together make up over half of Ethiopia's population, and are protesting both Tigray dominance in the ruling EPRDF as well as the state development model, the very core of Ethiopia's success over the last decade. A six-month state of emergency was declared in November 2016 and may well be continued when it runs out in April. At least 25,000 people have been detained and hundreds killed over the course of the protests. The government denies these figures. Ethiopia's role as a key security partner in the region is now threatened by domestic disturbances that have forced its withdrawal from regions of Somalia that have since been reclaimed by fighters linked to Al Shabaab.

²⁴ Africa Confidential, 'Eritrea's Unsettling Alliance', Vol. 58-3, 3 February 2017.

²⁵ Yeranian, E 2016, 'Yemen Proxy War Adds to Tensions among US, Iran, Saudi Arabia', *VOA News*, 6 February 2016.

²⁶ Shinn, D 2015, 'Turkey's Engagement in sub-Saharan Africa: Shifting Alliances and Strategic Diversification', *Chatham House*, 9 September 2015.

²⁷ Pitel, L 2016, 'Somalia Reaps Reward of Ankara's Investment', *Financial Times*, 25 May 2016.

²⁸ East African Community Secretariat 2014, *Trade report 2014*, Arusha, Tanzania, December 2015

²⁹ Fisher, J & Anderson, DM 2015, 'Authoritarianism and the Securitization of Development in Africa', *International Affairs* Vol. 91.1, pp.131-151.

Eritrea and Ethiopia have one of the most volatile borders in the world. There are clashes every year, some greater and some lesser, and although Eritrea's military strength was decimated in the last war and as a result of economic autarky, its forces have been spotted in Yemen and are likely growing in strength with support from Saudi Arabia and the UAE. If Eritrea perceives Ethiopia as fragile due to its ongoing protests, the danger of a renewed border conflict could be high.

Similarly, Sudan and South Sudan have a disputed border in the 14-Mile Area and Abyei. Abyei is the greater threat for renewed conflict. The disputed zone holds significant oil reserves and is of great economic interest should oil prices surge back above \$100/bbl. South Sudan's ongoing civil war puts it in a potentially weak position against Sudanese aggression. Sudan has historically supported insurgents in the south to contest SPLA power; however, its support for rebel groups in the ongoing civil war has been limited.

However, South Sudan in general has been the battlefield for neighboring power projection for decades. It is the contested buffer zone between Sudan and Uganda and between Sudan and Ethiopia. As its civil war has worsened and teetered into famine, South Sudan has threatened regional stability and may be changing regional relationships, possibly building bridges between traditional rivals Uganda and Sudan.³⁰ It is also a site of contestation between Ethiopia and Egypt over the Nile waters, a dispute stretching back over a century to agreements never ratified between the British and the Ethiopian empires.

Like South Sudan, Somalia's civil war has presented opportunities for regional power projection and contestation. Ethiopia, Kenya, Uganda, and Burundi all have troops in the country. The conflict zones have proven lucrative for sugar, drug, and charcoal smuggling operations,³¹ which some analysts believe have enriched politicians in Kenya contesting the 2017 elections.³² With recent elections, Somalia may finally be stabilizing thanks to a federal system that seems to link specific states with specific regional interests including Ethiopia, Kenya, Saudi Arabia, the UAE, and Turkey.

Humanitarian Implications

The greatest implication of increased regional competition is the real possibility of war. There are innumerable possibilities for conflict in the region over the next five years. The intensification or spread of conflicts in South Sudan, Sudan, and Somalia would lead to increased displacement, hunger, and death. Delayed elections in eastern DRC could take that region back into conflict. Protests in Ethiopia have already been met with violence, and if history is any indicator, the harder the Ethiopian state cracks down, the more likely that protests will spawn armed groups and intrastate violence. Some experts worry Kenya could be trending this way as well, especially if political protests are violently repressed. Burundi is still very fragile after the attempted coup in 2015, and if the opposition to Nkurunziza organizes, the country could face renewed civil war. Kenya's elections have some monitors worried that political violence could

³⁰ International Crisis Group 2016, *South Sudan: Rearranging the Chessboard*, Africa Report No 243, 20 December 2016.

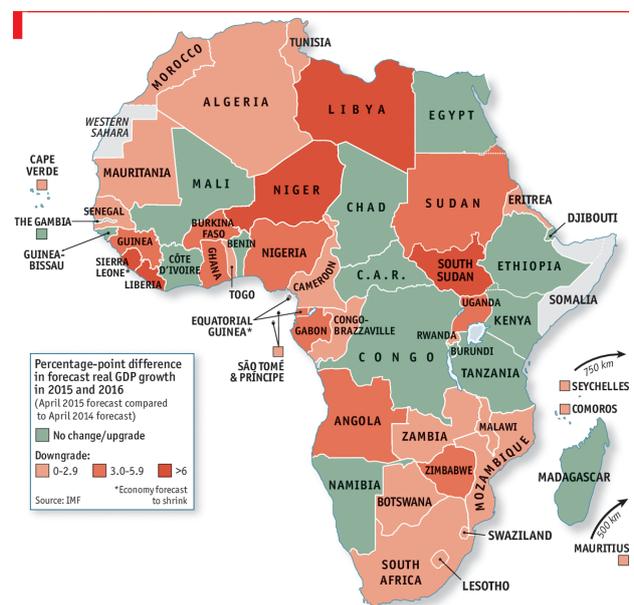
³¹ Rawlence, B 2017, *City of Thorns: Nine Lives in the World's Largest Refugee Camp*. Portabello, London. 2016.

³² Key informant interview, January 2017.

result in the mass death and displacement of 2007/2008.³³ Border disputes between Sudan and South Sudan and between Ethiopia and Eritrea may lead to interstate war if one or another party seeks to settle the disputes through violence.

Uganda is already the world's 3rd largest refugee hosting country in the region after Ethiopia and Kenya,³⁴ though Kenya's continued threats to close its Dadaab camps could displace thousands more to Uganda. It is unclear how much capacity the country has for more refugees should conflicts in South Sudan or eastern DRC worsen. Though its refugee resettlement policies have been lauded in international humanitarian circles, the threat of conflict between refugees and host communities cannot be ignored. Beyond Uganda, the overall push for increased containment of refugees could mean increasing numbers of IDPs, decreasing the strength of traditional social safety nets, and increasing the threat of man-made natural disasters. Borders that divide ethnic groups, such as that dividing Uganda and South Sudan for example, may exacerbate national political problems and provide opportunities for proxy mobilization by regional powers.

In early 2017, the United Nations declared famine in South Sudan's Unity State. This crisis is entirely man-made and the natural consequence of the Juba government's counter-insurgency policies and a catastrophic economic situation.³⁵ At the same time, Somalia is on the verge of famine due to two seasons of drought resulting in severe water shortages.³⁶ While Somalia may recover with better rains, South Sudan's food insecurity will not improve while conflict is ongoing. GAM rates in Kenya are some of the worst in the region, threatening an arc of disastrous food insecurity from Somalia through northern Kenya, to South Sudan. Worse, with similar food insecurity in Yemen and Nigeria threatening famine, the ability for the international community to respond is limited and perhaps, with the rise of populism in the West, decreasing. The adage 'do more with less,' may not be enough to respond to each humanitarian need in the region. Indeed, it may not be enough to respond to even the worst disasters.



Economist.com

³³ Aling'o, P 2016, 'Hate Speech and Ethnic Tension ahead of Kenya's 2017 Elections', Institute for Security Studies, 28 July 2016.

³⁴ Gardner, T 2016, 'Beneath the Surface of Uganda's 'Exemplary' Refugee Settlement, Tensions Simmer' *Reuters*, 15 November 2016.

³⁵ York, G 2017, 'Man-Made' Famine Declared in South Sudan: United Nations', *The Globe and Mail*, 20 February 2017.

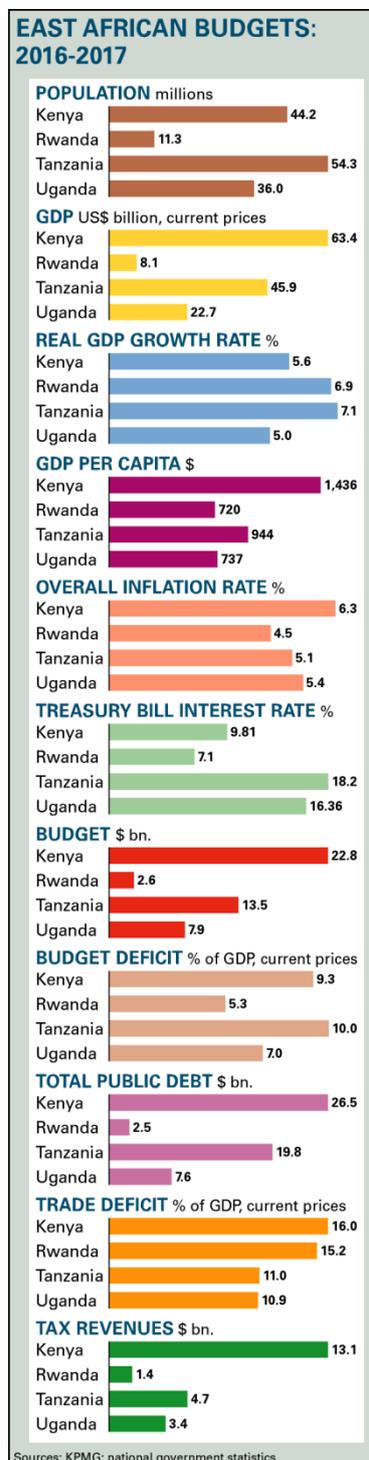
³⁶ York, G 2017 'Somalia on Brink of Another Famine, UN Warns', *The Globe and Mail*, 5 February 2017.

ECONOMIC GROWTH – EAST AFRICAN MARKETS OPEN FOR BUSINESS

Since 2000, East Africa’s economic growth has been consistently strong. While sub-Saharan Africa averaged 3.6% growth in 2015, second in the world behind East Asia, East Africa led the continent with growth averaging 6.3%³⁷ - far ahead of North, Central, and West Africa (averaging 3-4%) and Southern Africa (2.2%). Ethiopia has led the region and most of the world, charting annual growth of over 10% from 2004 – 2014, while Tanzania and Rwanda both posted gains of 7% in 2015, with Kenya and Uganda were not far behind at 5.5% and 5%, respectively. This high growth is expected to continue over the next several years, driven in part by services and construction (especially related to hydropower and several transnational infrastructure megaprojects), industry, and agriculture.

East African states, excepting Sudan, South Sudan, and Tanzania are non-resource intensive economies. Since 2013, the region has benefitted from the global downturn in commodity prices, especially the collapse of oil prices in 2014. Though the region is commodity dependent, the only country that truly suffered from decreased oil prices was South Sudan, where oil accounts for 98% of government revenue. Oil prices in 2016 were the lowest they had been in 13 years, due to oversaturation of international markets. These prices are expected to remain low over the next several years due to supply outstripping demand and China’s transition from industry to services.³⁸ Low oil prices benefit every country other than South Sudan, as the net gain from low oil revenues offsets low primary commodity prices for the region’s major exports and reduces the prices of food and fuel.

Low oil prices are typically equated with low food prices³⁹. Lower transport costs and the price of basic foodstuffs blunt inflationary pressures and increase the purchasing power of households, while potentially boosting domestic demand and alleviating poverty.⁴⁰ Continued low food and fuel prices are good for the region in the five-year outlook. Despite oil and gas discoveries in almost every major East African economy, most of these are not expected to come online for another five years,



³⁷ African Development Bank 2016, *African Economic Outlook 2016*, p. 19.

³⁸ Powell, E 2016, 'It Looks as though Oil Prices Will Remain Low through 2017', *Christian Science Monitor*, 13 September 2016.

³⁹ The World Bank Group, *Africa: Low Commodity Prices Continue to Impede Growth*, 11 April 2016.

⁴⁰ African Development Bank 2016, *African Economic Outlook 2016*, p. 36.

when governments hope that industrial demand will have recovered.⁴¹

Thus, while Africa's growth projections have been slashed for the next several years, this hides the fact that oil producers such as Nigeria and Angola have suffered disastrous reductions in their export revenues, while non-resource intensive economies like those of Ethiopia, Rwanda, Uganda, and Kenya have continued their strong growth. As these countries develop economically, they are beginning to create their own domestic and regional demand, potentially allowing them to invest more heavily in trade and industry and begin the structural transformation that is all but required to move into middle income status.

One major stumbling block for this drive to middle income status is the region's continued lack of investment in agriculture and rural livelihoods. No major non-oil economy has made a development transition without capitalizing the agricultural sector. With the risks to peasant agriculture due to climate change, the region will have to invest in irrigation, drought and heat resistant crops, and integrated agricultural techniques while simultaneously protecting their farmers and pastoralists with improved social safety nets. The agricultural sector still holds the majority of the region's labor force, and this trend will not change quickly. Without improvements in efficiency and productivity, this sector will continue to hold a lock on development potential.

Despite a lack of investment in agriculture, the region's states have invested heavily in infrastructure and trade. In 2017, two major transnational infrastructure projects are in the works, Kenya's Lamu Port-South Sudan-Ethiopia Transport Corridor (LAPSSET) and the Mwambani Port and Railway Corridor (Mwaporc). Kenya is pushing through its megaproject despite the high price tag (\$3.3bn) and the loss of most major international investors.⁴² The war in South Sudan and Uganda's decision to take its oil through Tanzania have presented major challenges to the economic viability of the project. Mwaporc, on the other hand, has gone from strength to strength with the addition of the Ugandan oil links.

Though the two projects do not directly compete with one another, they will come in competition for trade to the interior, and here Tanzania has the advantage. Mwaporc will link Rwanda, Burundi, Uganda, eastern DRC, Zambia, Zimbabwe, and Malawi to Tanzania's Bagamoyo port, whereas Kenya's transport corridor links its Mombasa and Lamu ports to more volatile regions of Ethiopia, South Sudan, Uganda and DRC. This competition directly benefits the interior, especially Uganda, which will be able to set the two transport corridors against one another, as it



⁴¹ Kennedy, S 2016, 'Why Investors in Oil and Gas are Moving Capital out of East Africa' *The East African*, 3 September 2016.

⁴² Achuka, V 2016, 'Kenya to Soldier on even as Partners in LAPSSET Pull Out', *The Nation*, 6 March 2016.

has already done. It is important to both Kenya and Tanzania that their respective investments pay off. Though their debt portfolios are still considered 'safe' by the IMF, as they inch closer to the 50% debt to GDP ratio, their credit may run start to run dry.⁴³

Despite competition between Kenya and Tanzania, trade will bring the region together at the expense of Sudan and Eritrea, who will likely grow closer to the Gulf States as a result of being excluded from East African trade routes. Ultimately, these transnational infrastructure projects are visible manifestations of a commitment to greater regional unity, which seems to exclude Sudan and Eritrea. Ethiopia itself may or may not join the regional trade network, as it has completed its own rail line through Djibouti and has pledged a pipeline connection to Juba. Expect to see regional relationships become increasingly intertwined with trade and economic opportunities as megaprojects go online.

There are significant uncertainties over the five years of this outlook, and any strategic plan must incorporate these uncertainties into how economic growth or contraction will affect livelihoods in given areas. Contingency plans must always be in place for programming to remain relevant and sustainable in the long-run.

Humanitarian Outlook

As East Africa's economies grow stronger economically, they have begun to insist on more national control over humanitarian and development partners. Some NGOs have decried what they consider the infringement of their neutrality and independence that increased government cooption of aid has entailed. However, regional aid comparisons show that as states develop economically, and development aid becomes a less and less important component of health and education spending, governments will seek to transition international aid to local government and national NGOs.

The region is not there yet. Overall, the ratio of aid to government budgets is 20.5%. However, there is significant variability in that statistic. The smaller economies of Rwanda and Burundi receive 45.3% and 50.2% of their budgets from aid, whereas Kenya receives only 12.8%. The increasing control of international humanitarian and development NGOs has mirrored the increased control of national NGOs and civil society, as aid increasingly supports 'front-line' states in the war on terror, which are increasingly looking to East Asian models of the developmental state, often including more repressive government control of society.

In addition to national control of aid and development financing, the wave of populism in the West has seen several countries already fold their aid programs into their foreign ministries. The possibility is on the table for two of the region's biggest contributors, the United States and the United Kingdom. Republicans in the United States have in the past tried and failed to fold USAID into the State Department, but may have a stronger hand to play with President Trump's "America First" policies. Priti Patel, the head of DfID, has publicly championed the elimination of DfID by incorporating it into the Foreign Office. This move is explicitly geared to using aid to promote British economic and trade interests, which could benefit the East African states but may not achieve much in the way of poverty reduction or human development.

⁴³ Personal Interview, IMF East African official, November 2016.

SCENARIOS FOR 2022

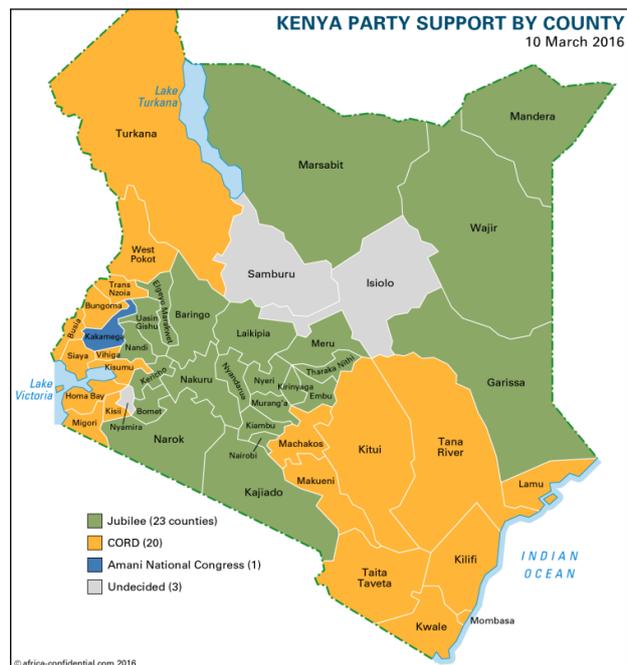
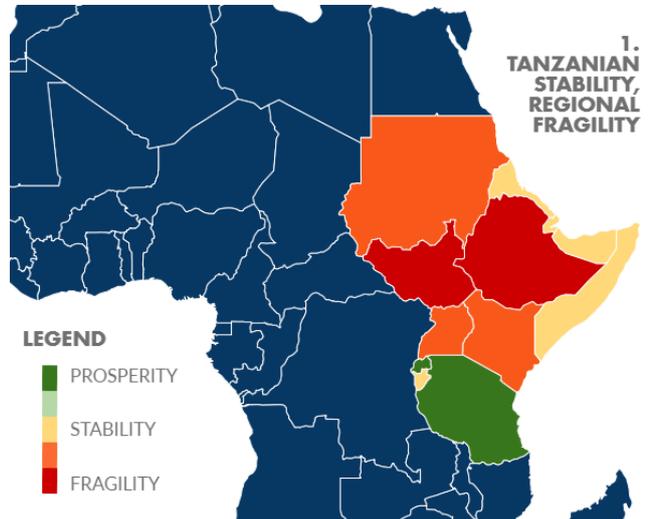
Scenario One – Tanzanian Stability, Regional Fragility

By 2022, the region’s weight has shifted to Tanzania. With strong growth and heavy investment, the country has linked itself to Rwanda, Uganda, eastern DRC, and its southern neighbors. However, Tanzania’s success is an island of stability compared to the rest of East Africa and the Horn.

Ethiopia’s protests turned increasingly violent over 2017 and 2018, and by 2020, armed groups started to appear in its periphery areas, especially along the borders with Sudan, Eritrea, and Somalia. International observers believe that these groups receive funding from both within and outside the region, but it is difficult to prove anything in the midst of a new renaissance for non-state actors in the Horn.

Commodity prices have been rising over the past five years and are approaching levels not seen since 2008. This has prompted a wealth of money and interest to pour into the region from a variety of actors including the US, UK, EU, Russia, South Korea, India, China, Israel, Turkey, Egypt, South Africa, and the Gulf States. Several countries have oil and gas installations coming online, which will prove to be a boon to governments but are not guaranteed to boost development budgets.

Many believe that this money is fueling insecurity via proxy conflicts in nearly every state save Kenya, Tanzania, and Rwanda. South Sudan’s civil war has fractured into competing rebel groups and ethnic militias, many of whom are sporting new rifles brought in from Sudan, Uganda, and farther afield. Eastern DRC is repeating some of the violence from the early 2000s as various militias vie for control of lucrative mineral reserves. Sudan’s troubles in Darfur and the Two Areas are increasing, and even northern and western Uganda are seeing a return to violence as brutal counter-insurgency tactics seem only to create more armed resistance.

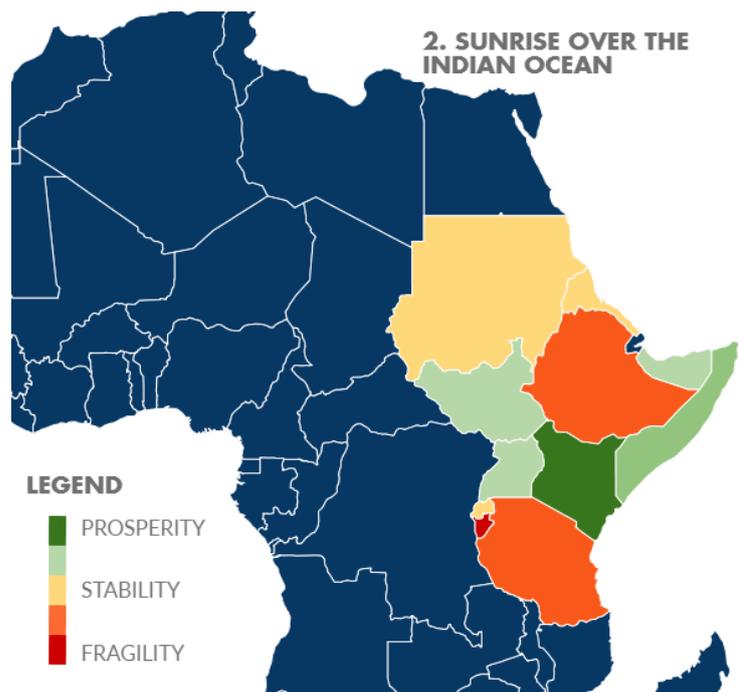


The success of Mwaporc was due in part to disastrous elections in Kenya. The 2017 elections were marred by conflict. The country's decentralization successfully devolved power to the counties but at the cost of violent contestation around the country. Jubilee was left on top of a very shaky political situation, and Kenya's trading partners turned toward Tanzania, sacrificing cost for stability. The loss of revenue cut funding for LAPSSSET, ending Kenya's political designs to join the region closer together through Lamu and Mombasa ports. With increasing violence and instability in Ethiopia, South Sudan, and Uganda, it was unlikely that any other investor was going to pick up the tab.

With all this money flowing into the system, one thing that has not changed is Western aid and development spending. Indeed, it seems that Western administrations have not known how to react to the increase in conflict and volatility and have merely continued to prioritize emergency relief (which has grown tremendously) and human development (which is only effective in the peaceful regions of certain states). The violence that has gripped East Africa has shredded nearly a decade of growth and does not look to end anytime soon as the geopolitical competition between various powers has taken on a life of its own.

Scenario Two – Sunrise over the Indian Ocean

The new Trump administration saw less American interest in East Africa, and China's transition towards a service economy meant that, while it was still a major player in infrastructure, it drew down economic interest in foreign expansion and turned towards servicing domestic demand. This allowed others to step in. India overtook China as the region's biggest trade partner in 2018, and has invested in developing East Africa as a market for its exports, as well as a conduit for commodities. The Gulf States and Turkey used the open field to move into strategically important areas in the Somali Coast and along the Red Sea, supporting political allies and undermining leaders who oppose their interests. By 2022, East Africa is looking increasingly east, not to China, but to the old trading partnerships that built up the Swahili city states.



The biggest trading partner in the region is Kenya, whose investment in infrastructure has paid off in spades. The region's trade now overwhelmingly goes through Mombasa and Lamu, though a stable Somalia may soon give Kenya a run for its money in the coming decade. Kenyan elections were marred by violence and controversy, but international partners, governed by increasingly populist leaders, did not care to challenge Jubilee's win. The Mombasa-Nairobi-

Naivasha rail link and the LAPSSET corridor were completed at the cost of drastically increasing the country's public debt while private investors made a fortune off inflated budgets. Though citizens grumble about worsening corruption, CORD's collapse in 2017 has prevented any meaningful opposition from challenging Jubilee's dominance.

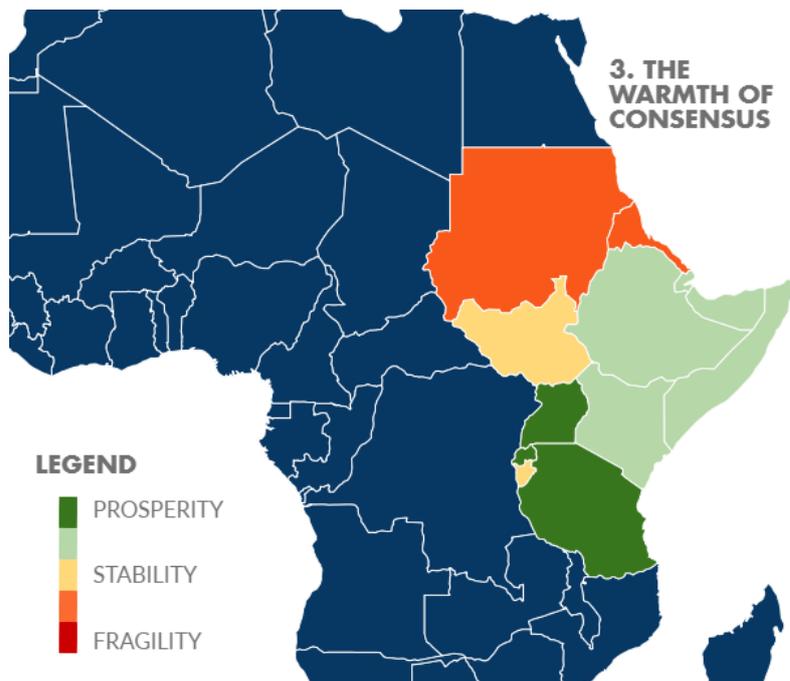
In comparison, Tanzania's Mwaporc line failed to draw investment and economic links, shaking confidence in CCM and President John Magufuli. The 2020 elections in that country were highly contested, and CCM has the slimmest majority it has had in its history. As a result, the country has turned inward, focusing on its own domestic issues and bringing politics back to Nyerere's grassroots vision. This has left Kenya in the driver's seat, as LAPSSET now services the Ethiopian hinterland, South Sudan, Uganda, and DRC.

Commodity prices have not recovered, and investments in oil and gas are not paying off for the majority of economies in the region. However, food prices shot up in 2019 and 2020 due to a series of poor harvests and decreased investment in agriculture. Ethiopia's protests worsened, and it withdrew from the region to manage its domestic issues. Uganda and Sudan pushed for peace in South Sudan in part to encourage agricultural development in the country for their own consumption. The two essentially divide the country, and while there is sporadic violence, peace in 2022 is fragile but holding.

Western aid interests have essentially withdrawn in this scenario. Somalia has stabilized, so American security interests are not prioritized. Sudan and Eritrea are firmly within the Gulf orbit and so have successfully managed their return to regional prominence. East Africa is no longer a source of insecurity to Western interests, either via migration (which Sudan has controlled in often brutal ways) or terrorism. With Ethiopia and Tanzania focused on domestic issues, and a tentative peace between Uganda and Sudan, Eritrea playing nice and Somalia more or less stabilized, Kenya feels itself to be the leader in the region, and in many ways, it is.

Scenario Three – “The Warmth of Consensus”

Over the last five years, China and the United States have closely worked in concert to keep East Africa in their orbit and to limit the influence of other countries. The two powers increasingly fund trade and investment projects in order to maintain good relations with the major players in the region, especially Tanzania, Kenya, and Uganda. As a result, both LAPSSET and Mwaporc succeed, bringing increased economic growth to the region as well as binding the region together more strongly. Unfortunately for Eritrea and Sudan, these economic



networks do not benefit their interests and they both grow increasingly close to the Gulf States and Egypt.

Low oil and food prices lead to continued strong growth and by 2022, many of the region's states, including Kenya, Tanzania, and Uganda look well on their way to middle income status. Ethiopia maintains its economic growth, bringing enough development to temper protests and keep the country stable. Western aid is channeled mostly to industry and trade and international organizations struggle without the health, education, and human development funds that have sustained them for the better part of a decade as aid is by and large now a product of ministries of foreign affairs rather than independent departments.

Kenya's elections are highly contested, with limited violence, but in the end, both sides agree that the contest was fair and agree to stand by the results. In this scenario, the winner does not truly matter. The transition reminds many of Nigeria's 2015 elections, which surprised many who anticipated violence but were met by democratic consolidation. Though Kenya could use this domestic stability to project its regional power, it subjugates individual state interests to better regional relationship in a revitalized EAC.

By 2022, the region is growing stronger and successfully working to blunt South Sudan's conflict, which has proven too much of a burden for the region to bear. Overall, East Africa is stronger and more prosperous at peace and without the regional contestation that has defined so much of its post-colonial history.

GAME CHANGE/POSSIBLE DISRUPTIONS

The analysis in this report attempts to delimit the possibilities for the region in 2022 within what is both possible and plausible. As such, it deals in disruptions within a set of parameters. However, there exist several scenarios that are low probability, high impact 'breakthroughs' that are difficult to account for in strategic planning. The following are situations that could create major disruptions across the region but that are difficult to bring to bear in everyday strategic thinking.

Death in the Afternoon

Uganda, Rwanda, Sudan, and Eritrea are countries that have been ruled for decades by the same men. Sudan and Eritrea are autocratic systems in which the presence of Presidents al-Bashir and Afewerki has helped stabilize political contestation. South Sudan appears to be headed in similar direction under Salva Kiir, but the general atmosphere is far more chaotic and volatile as political contestation is ongoing between the Bahr el-Ghazal Dinka, the "Garang Boys," the former SSDF, SPLA stalwarts from the Equatorias, and powerful ethnic groups with their own constituencies.

While Yoweri Museveni does not hold the same type of political power as al-Bashir or Afewerki, he has steadily personalized his rule since 2010 through his family.⁴⁴ His wife, Janet has gained a

⁴⁴ Murray, E, Berouk, M & Wolters, S 2016, 'Weak Ugandan Democracy, Strong Regional Influence' *Peaceworks*, No. 120, United States Institute of Peace, 30 September 2016.

power base in the north as State Minister for Karamoja Affairs. His son, Muhoozi Kainerugaba, has rocketed through the ranks, becoming Commander of the elite Special Forces before being moved into a presidential advisory role in January 2017.⁴⁵ Museveni's death could force a confrontation between his personalized rule and the old guard NRM leaders. Where the younger cadres stand is anyone's guess.

Pandemic

The Ebola crisis in West Africa upended many humanitarian and development goals in the two years it ravaged Liberia, Sierra Leone, and Guinea. It was the largest Ebola outbreak in history and prompted a global response to contain it. The disease is originally East African and was discovered in two simultaneous outbreaks in 1976 in Nzara, now part of South Sudan, and Yambuku, DRC. Other hemorrhagic diseases such as Marburg Virus are often found in the Great Lakes region of Uganda, DRC, Rwanda, and Burundi.

Uganda is currently testing vaccines for both Ebola and Marburg virus, but in today's globalized age, the risk that a previously little known disease could mutate and infect humans is high. Many believe that the next global pandemic, similar to the Black Death or Spanish influenza is only a matter of time.⁴⁶

Potentially worse for the region is a disease or invasive species, such as army worm, that targets crops or cattle. Such an epidemic could destroy the livelihoods of many rural poor in the region, and seriously damage economic growth and opportunity.

CONCLUSION

East Africa is exceedingly complex. With 312m people stretched over 11 countries in dozens of climactic zones, political power structures, and economic models, the region defies easy categorization and analysis. There are some simple, broad-brush strokes that can help understand the region. Western allies including Kenya, Uganda, Ethiopia, Rwanda, and Tanzania have succeeded with the advent of the War on Terror. The state development model is succeeding in East Africa with strong growth in non-resource intensive countries. Terror has brought extensive Western attention and money to the region, and East Africa's leaders contest power in part to access international largesse.

For much of its post-colonial history, these regional rivalries have defined state interests in the Cold War, the unipolar world of American dominance, and the rise of China. However, these relations might now be changing. Money is flooding into the region in search of influence. How that money shapes relations will shape the region over the next five years and into the future. Will money upend the political marketplace and create definite winners and losers and so prompt violence? Or will the money be channeled into infrastructure that links the region closer together and launches it on a developmental path that could see the rapid gains of East Asia in the 1950s and 60s? Many paths are open for both quick gains and long-term prosperity. ■

⁴⁵ Africa Confidential 2017, 'Museveni's Marathon', Vol 58, No 2, 20 January 2017.

⁴⁶ Woolf, N 2014, 'Ebola isn't the big one. So what is? And are we ready for it?', *The Guardian*, 3 October 2014.

EAST AFRICA AND THE HORN IN 2022: An Outlook for Strategic Positioning in the Region

March 2017

Humanitarian Foresight Think Tank

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HUMANITARIAN AND DEVELOPMENT PROGRAMME

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