



POLICY BRIEF

How an IGAD Regional Maritime Council can boost trade

Ahmed Hersi and Roba D Sharamo

The Intergovernmental Authority on Development (IGAD) region spans geostrategic waterways of the Red Sea, the Gulf of Aden and the western Indian Ocean. In ancient times, these routes were a conduit for African trade to and from Arabia, India and beyond. It is time for IGAD to maximise the potential of maritime trade by establishing a Regional Maritime Council that can revitalise maritime industries and promote economic integration.

Key findings

- ▶ Maritime trade in the Intergovernmental Authority on Development (IGAD) region is poorly developed and lacks a regional mechanism to promote maritime industries for improved coordination and better economic returns. Although individual countries have several entities, such as port and customs authorities and shippers' councils, that facilitate trade, no coherent structures exist at the regional level.
- ▶ Trade inhibition procedures, costly regimes and exorbitant insurance premiums greatly affect the movement of goods and services within the region resulting in port congestion, high stockpile levels and expensive logistics and handling costs.
- ▶ IGAD member states lack coordinated regional trade policies that could ease interstate and transit trade to improve economic integration. The region also needs mechanisms to proactively deal with challenges and bottlenecks faced by the maritime industry players.
- ▶ The region lacks a trade facilitation regime and programmes that could offset some of the current constraints mainly affecting transit trade.
- ▶ There are insufficient infrastructural capacities such as ports, railways and roads that could ease transit trade transportation systems. The current state of affairs indicates an underdeveloped transport infrastructure that acts as a barrier to economic development in the sub-region.
- ▶ The maritime and shipping sector lacks qualified supply chain professionals. As a result, there are glaring operational inefficiencies in most countries in the sub-region.

Recommendations

For IGAD member states

- ▶ Direct the establishment of the IGAD Regional Maritime Council (RMC) with a clear mandate to champion the revitalisation of maritime trade in the region. The RMC should be well resourced to promote interstate maritime trade and serve as the focal mechanism for coordination, strategic collaboration and advocacy for all the regional maritime players.
- ▶ Review the status of the implementation of the IGAD RMC and re-examine its relevance to effectively promote maritime trade in the region and Africa as a whole.
- ▶ Create an IGAD Free Trade Area within the region to benefit from the adoption of the African Continental Free Trade Agreement.
- ▶ Nurture political will across the region to economically integrate IGAD's maritime trade.

For the IGAD Secretariat

- ▶ Prepare a business case for the establishment of the IGAD RMC by making it a priority item in the agenda of the Summit of IGAD Heads of State and Government.
- ▶ Commission studies to comprehensively examine the current state and potential of maritime economies and intraregional trade in the IGAD region.
- ▶ Undertake robust stakeholder mapping of maritime industry players and entities, and hold regular consultations with them to accelerate efforts in trade facilitation as part of a regional integration agenda.
- ▶ Provide support to the member states' Maritime Training Institutes and establish a regional body of knowledge and expertise on maritime matters.

Introduction

In July 2019, the Intergovernmental Authority on Development (IGAD) and the Institute for Security Studies (ISS) convened a high-level workshop in Mombasa, Kenya. It was attended by delegations from IGAD member states, shippers councils, national maritime associations, port authorities and coastguards from Djibouti, Ethiopia, Kenya, South Sudan and Uganda among other Indian Ocean countries.

The objective of the meeting was to discuss plans for creating an enabling environment in the IGAD region that would deal with maritime threats and ease bottlenecks and challenges to maritime-based regional trade. These plans would help reduce the burden on regional shipping industries due to high costs, including high premium costs, congestion and complexity.

The high premium costs are applied to ships transiting through the High Risks Areas (HRAs) prone to piracy in the Red Sea, the Gulf of Aden and the western Indian Ocean.¹ Following negotiations, the HRA was revised in May 2019.²

Due to tensions in the Persian Gulf region and subsequent attacks on ships transporting crude oil, these high war risk insurance premiums have been introduced particularly in the Gulf zone³ and when transiting the Red Sea, through the narrow Bab-el-Mandeb Strait and into the Gulf of Aden.

A holistic approach is required to address the numerous sea-based challenges and threats

This policy brief provides an overview of the state of maritime trade in the IGAD region and the challenges to it. It is argued that for the region to realise improved maritime trade and transit, a holistic approach is required to address the numerous sea-based challenges and threats. It is thus imperative that IGAD establishes a Regional Maritime Council (RMC).

The RMC will be a regional mechanism that brings together all member states, relevant entities, authorities and shipping associations to effectively streamline and boost regional maritime trade. It will do this by easing bottlenecks and moderating challenges facing maritime industries in the IGAD region.

The policy brief also discusses what measures and mechanisms are needed on a regional level to:

- Harness the economic and commercial potential of the region.
- Mitigate maritime threats including adverse political fallout from the Gulf crisis⁴ which negatively impacts the region.

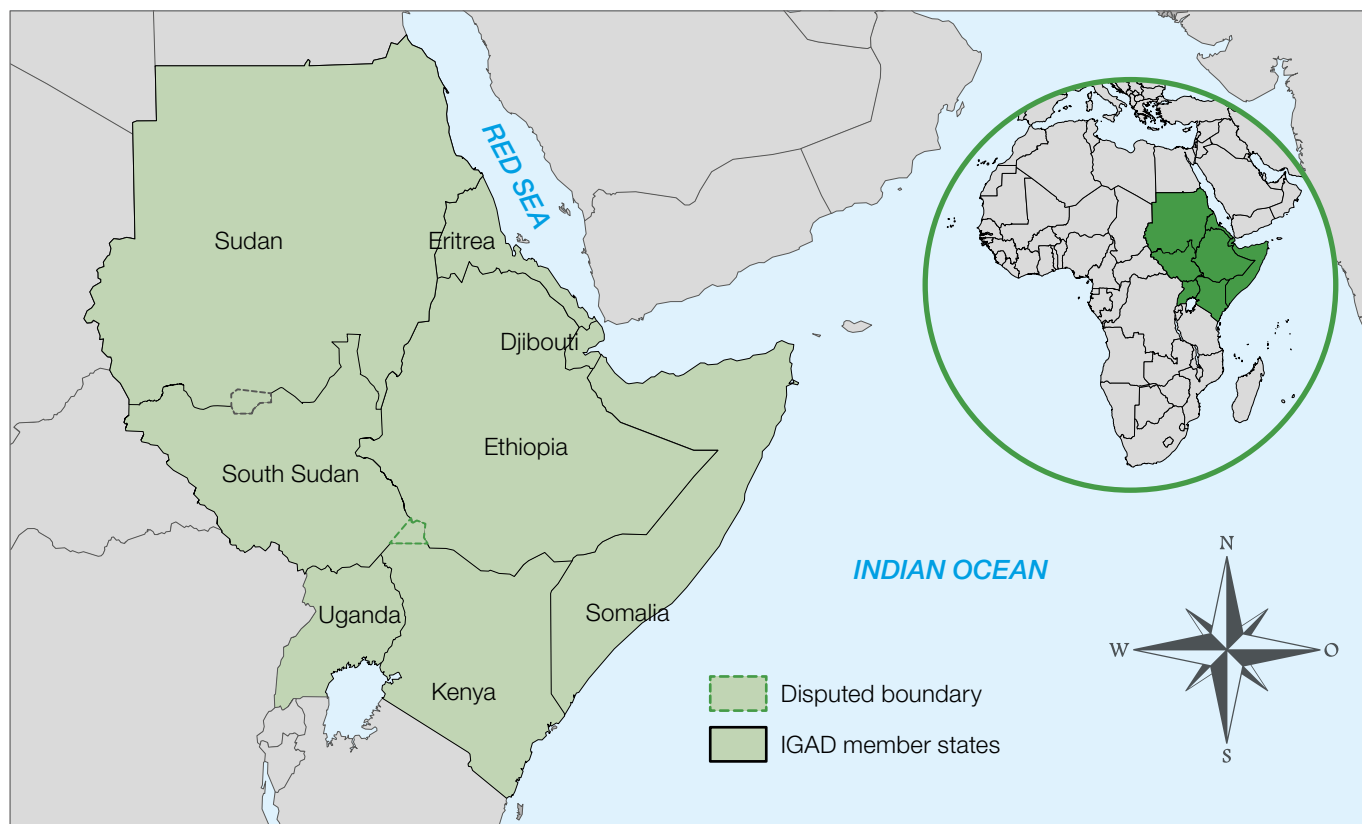
Context and current maritime threats

Geographically, the IGAD region covers an area of 5.2 million km² and includes Djibouti, Eritrea, Ethiopia, Kenya, Somalia, South Sudan, Sudan and Uganda. The coastline stretches for 6 690 km and extends from the



THE IGAD REGION HAS
ABUNDANT NATURAL
RESOURCES

Figure 1: The IGAD region



Red Sea to the Gulf of Aden and the Indian Ocean. The IGAD region is adjacent to the Eurasian landmass and is separated from it by only 32 km. It has a population of about 250 million people.

The IGAD region has abundant natural resources but a robust maritime trade among the member states and internationally has not developed. Decades of intrastate and interstate conflicts, poor infrastructural connections, limited regional economic integration and underdeveloped economies have undermined the growth of the maritime trade.

Five of the eight IGAD member states, namely Sudan, Eritrea, Djibouti, Somalia and Kenya, are littoral states. This strategic area experienced an upsurge of piracy between 2005 and 2008, in particular off the Somali coastline. Millions of dollars were lost to the pirates in the form of ransom money, enhanced security escorts and delayed transit and this maritime piracy greatly affected the international shipping business.

To address this piracy, the international community swiftly responded through the United Nations Security Council Resolution (UNSCR) 1851 of 2008 which is annually renewed.⁵ Over 40 nations deployed naval forces to patrol both the Red Sea and the Gulf of Aden.⁶ These international responses and deployments demonstrated the economic value and significance placed on the security of the sea lanes of communication (SLOC) in the region, which transport some of the world's most strategic goods, such as oil and gas.

THE IGAD COASTLINE
STRETCHES

6 690 km

EXTENDING FROM THE
RED SEA TO THE GULF OF ADEN
AND THE INDIAN OCEAN

Overall, the marked reduction in maritime piracy in the region is due to several factors:

- Global strategic coordination and increased patrols by the international maritime security operations under the Combined Maritime Force 151 contributed to the decline.⁷
- International shipping companies and vessel owners adopted more stringent security measures onboard that frustrated the pirates' hijacking and hostage-taking attempts.
- International partners' increased support to Somali authorities lent much-needed operational capacity that contained lawlessness in remote coastal communities that were previously notorious pirate strongholds.

Other issues impacting on this strategic conflict-prone and fragile region include the Iran–US standoff and tensions that appear to have resulted in a recent spate of incidents in the Arabian Gulf around the Strait of Hormuz.

Rationale for collective regional action

The African continent is poorly integrated in terms of infrastructural linkages, it is constrained by too much red tape and has too many obstacles to stimulate intercontinental trade. However, the future of intercontinental trade is not bleak.

At the continental level, various instruments, such as the 2050 Africa's Integrated Maritime Strategy (2050 AIM Strategy)⁸ and the recent African Continental Free Trade Agreement (AfCFTA), serve to create an enabling environment for trade with the African Union (AU) member states. Entering into force on 30 May 2019, following overwhelming political will, the AfCFTA was signed by 54 of the 55 AU countries and ratified by 30.⁹

According to the United Nations Economic Commission for Africa (UNECA), pre-COVID-19 pandemic estimates indicate a 52% increase in intra-African trade by 2022.¹⁰ This is because the AfCFTA requires its members to remove 90% of the tariffs on goods and allow free access to commodities, goods and services within Africa by sea and overland. Of course, this is with the assumption that the state parties¹¹ to the AfCFTA agreement will continue honoring trade and customs arrangements that are already in place.

Africa's maritime trade is currently extremely low. The AU only recently focused attention on this issue and developed the AU maritime strategy.

The connectivity and capacity of the global shipping fleets provide the backbone for global maritime trade. According to the United Nations Trade and Development Agency (UNTAD), the global maritime trade and industries and related value additions employ tens of thousands of people worldwide.¹²

Despite vast natural sea corridor endowments, Africa is not well connected to the global maritime trade. Likewise, although Africa is heavily dependent on global maritime trade with 90% of its imports and exports being seaborne trade, African countries only own 1% of shipping fleets.¹³ This continental picture is not an optimistic one.

At the continental level, there have been initiatives launched at the AU to redress low intra-African trade¹⁴ and general cargo, among other things. Proposals were put forward to stimulate continent-wide cabotage laws with the view of increasing maritime trade and easing intra-Africa trade barriers. A pan-African cabotage policy is an option that needs to be explored.¹⁵

Despite vast natural sea corridor endowments, Africa is not well connected to global maritime trade

At the IGAD level, the maritime and shipping industry's contribution towards national economies in the IGAD region has not yet been determined. The present emphasis is on the development of trade corridors such as the Lamu Port–South Sudan–Ethiopia Transport Corridor (LAPSSSET) linking Kenya to South Sudan, Ethiopia and Uganda; the Berbera–Addis Ababa highway; the Kampala–Djibouti corridor; and the rehabilitation of Eritrea's ports of Massawa and Assab and road links to Ethiopia.

According to the Mombasa-based Ports Management Association of Eastern Southern Africa (PMAESA), there has been little collaboration between African countries in creating the necessary synergies for developing an African cabotage system and the associated port infrastructure. This would cater to the new generation of

ships being constructed that could ply the Eastern and Southern African sea lanes.¹⁶

Similarly, during a July 2019 meeting, the representatives of the Shippers Council of East Africa (SCEA) and allied industries discussed key challenges inhibiting the realisation of the full potential of the maritime industry. These include:

- Lack of qualified supply chains professionals
- Existence of costly regimes inhibiting trade and movements of goods and services within the region
- Congestion caused by high stock levels at ports of entry
- High logistics and handling costs
- Insufficient infrastructure capacities
- Politics and lack of harmony among member states
- Lengthy freight clearance and arbitrary fees or charges
- Cargo insecurity and pilferage
- Unharmonised working hours and varying weights at various weight bridges
- Operational inefficiencies along the Northern Corridor.¹⁷

According to shipping industry experts, since 2008, shipping insurance costs have risen. Most of these increases are passed on to the consumers of cargo goods especially those shipped through the HRAs.¹⁸

For example, shipping lines, such as the Mediterranean Shipping Company, add a piracy surcharge for Port Sudan of US\$150/300 per TEU/FFE included as freight surcharges passed onto shippers as indicated above.¹⁹ According to regional authorities, for exports and imports to and from Middle East Gulf states, all shippers, including all IGAD member states, attract a war risk surcharge of US\$36–40 per TEU container. These additional costs reduce the competitiveness of regional imports and exports.

Need for a Regional Maritime Council

In November 2017, the ISS helped convene an important roundtable in Addis Ababa to enhance dialogue about IGAD's Integrated Maritime Safety and Security Strategy (IMSS 2015–2030).²⁰ During the roundtable, the regional policymakers and experts

called for the creation of a 'regional platform' to coordinate both economic and technical matters regarding the region's maritime domain.

In July 2019, ISS and IGAD met up again in Mombasa. Shippers and port and maritime administrators were brought together to discuss the establishment of a region-wide RMC as recommended during the previous roundtable. The results of the discussion were later put forward as a recommendation in the Mombasa Resolutions in July 2019.

IGAD, as one of the AU's recognised Regional Economic Communities (RECs), is a key building block for an overall common African Economic Community and can play an important role in the economic integration of the continent. The IGAD region, through its member states, is well-positioned to play an important link in the creation of a free trade area. The member states could leverage their ports, dry-docks and infrastructure to bring more investments into the sector.

IGAD must promote and support trade facilitation efforts as a part of regional integration

By involving the private sector and industry players, IGAD must advocate for increasing interstate trade. This will in turn encourage the development of much-needed infrastructure connecting not only the member states but also countries in other economic blocks, such as the East African Community (EAC) and the Southern African Development Community (SADC). The development of an integrated and liberalised regional transport market in the IGAD region depends on the existence of a larger, more competitive and efficient maritime and shipping sector.

To stimulate the maritime and shipping sector, IGAD must promote and support trade facilitation efforts as a part of regional integration. The region could accrue significant economic benefits in the short and long term with Djibouti, Berbera, Mogadishu, Mombasa, Lamu and Assab as the region's premier entry ports. However, substantial investment in these ports is necessary to upgrade and expand the infrastructure, facilities and systems. It is also important to

deliberately link these ports across national borders by developing regional transport corridors and highways.

These concerted regional integration efforts could boost transit trade and increase rapid economic growth for its member countries. Such investments will position the IGAD region in the global maritime trade circuit.

Furthermore, the IGAD region is yet to explore the potential for Short Sea Shipping (SSS)²¹ which is the use of maritime transport for goods over short distances as opposed to high seas shipping. The IGAD region – with its vast 6 960 km coastline along the Indian Ocean, the Gulf of Aden and the Red Sea – can be a good example for the SSS model with extensive potential for trade within the region.

It is worth noting that a SSS platform can be constituted by member states' key actors from the private and public sectors, such as shipping councils, ports and maritime administrations and chambers of commerce.

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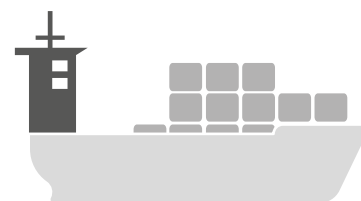
To collectively address the many challenges to maritime trade in the region, the IGAD member states must establish an RMC. The RMC will be a regional body mandated by IGAD Heads of State and Government to:

- Promote and streamline regional maritime trade in the region
- Review and deal with bottlenecks faced by the shipping industries
- Coordinate operations with other global entities.

The RMC will have a small secretariat integrated into IGAD's secretariat structures. The proposed establishment of the RMC is in line with the adopted IGAD IMSS 2015–2030 Strategy. Procedurally, IGAD Heads of State and Government should formally approve the creation of the RMC.

Among its key functions, in addition to coming up with a proper framework for boosting maritime trade in the region, the RMC needs to advocate for the interests of the shippers and lobby regional and international governments. For instance, the body could push for the review of high insurance premiums imposed on ships transiting through insecure sea corridors.

As an example, in 2015, a revision of the HRA was undertaken at the behest of littoral states for India who had complied and increased its offshore patrols.²² The IGAD region needs to negotiate effectively for the review of the HRA and its ultimate scrapping. The HRA mechanisms are determined and reviewed by the Baltic and International Maritime Council (BIMCO), an international group made up of shipping associations, oil industry organisations and the International Chamber of Shipping (ICS) among others.



THE IGAD REGION IS YET TO
EXPLORE THE POTENTIAL
FOR SHORT SEA SHIPPING

It is necessary for a concerted effort by the IGAD region to collectively, and in collaboration with international initiatives, fulfil the security burden of patrols and curb piracy, especially off the Somali coastline.

Conclusion

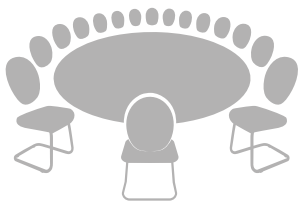
To effectively deal with the numerous challenges in maritime trade, IGAD must urgently establish the RMC. This would be composed of both private and public sector stakeholders.

Such a council would assist in assessing the state of the maritime economy, challenges and opportunities. It would provide a forum for state and non-state actors to regularly consult and address challenges. It would also develop strategies and policies for member states to create an enabling environment to facilitate maritime trade in the region. The RMC would work towards bringing a common understanding amongst shipping and maritime industry players, government entities, local communities, the tourism sector, member states and other interested parties.

Through the creation of the Regional Maritime Council, the IGAD region could have an early start and reach out to other RECs

Importantly, the RMC will act as the region's collective voice to engage and negotiate with cross-regional maritime authorities as a step towards effectively positioning the IGAD region in global maritime trade circles. The RMC can also assist with the strategic coordination of other global players to streamline and promote the IGAD maritime sector's growth while addressing sea-based threats.

Through the creation of the RMC, the IGAD region could have an early start and reach out to other RECs. These would include the EAC, SADC, Economic Community of Central African States (ECCAS), Common Market for Eastern and Southern Africa (COMESA), Community of Sahel-Saharan States (CEN-SAD) and Economic Community of West African States (ECOWAS) as well the Maghreb Union and the Gulf Cooperation Council/ Arab League. Such an engagement should focus on building regional and continental consensus to effectively implement the AfCFTA²³ with a special focus on the enhancement of intra-Africa maritime trade from the Gulf of Guinea to the Somali coast.



TO COLLECTIVELY ADDRESS
MARITIME TRADE CHALLENGES,
IGAD NEEDS AN RMC

Recommendations

To effectively boost maritime trade in the region and promote strategic coordination with other global players, the following policy options could be undertaken by IGAD Heads of State and Government through the IGAD Secretariat:

- Establish an IGAD RMC as a regional body that will work to promote maritime trade and serve as the focal mechanism for coordination,

strategic collaboration and advocacy for all the maritime players in the region. The RMC should be mandated to promote and advance maritime trade and as well as lobby for the removal of all bottlenecks that undermine the growth of the maritime sector in the region.

- Commission a study to comprehensively examine the state and the potential of maritime economies and trade in the region and then propose strategies and policy options for effective implementation of AfCFTA with a focus on inter- and intraregional maritime trade.
- Commission feasibility studies on the development of SSS modal transport systems and also examine value addition to increase interstate trade using existing maritime ports in the region.
- Initiate efforts in trade facilitation as part of regional integration with a focus on increasing inter-regional cabotage. This goes hand-in-hand with the development of integrated and liberalised regional transport considering the maritime transport,

supply and logistics sectors to increase inter-regional cabotage.

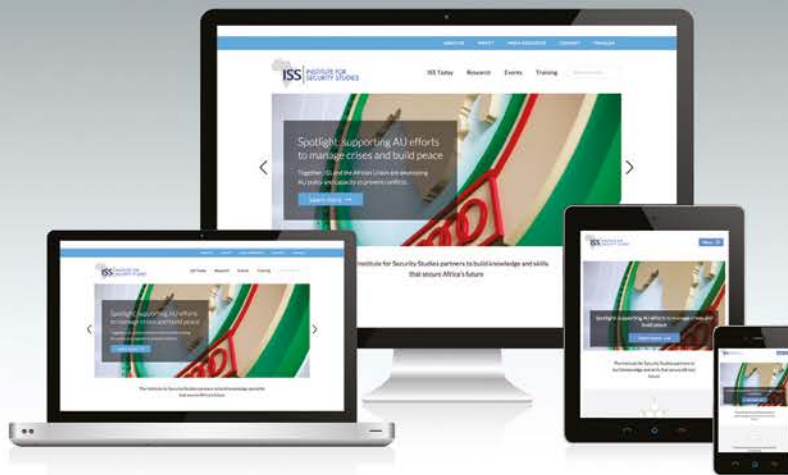
- The IGAD countries should approach maritime and shipping industries from the standpoint of cabotage. Hence, the IGAD member states, through relevant entities, need to undertake an extensive mapping of the maritime industry players and their assets including ownership, registration of vessels and various service providers.
- Push for IGAD's Free Trade Area (FTA) within the region to benefit from the adoption of the AfCFTA. This will create significant economic and job creation opportunities for the region which could augur well in terms of trade facilitation and continental integration ideals under the AU's agenda 2063.
- Use an in-house IGAD Strategy 2016–2020 as well as the AfCFTA and Action Plan for Boosting Intra-African Trade (2012) to roll-out regional-level protocols. The protocols will create a facilitation regime to enhance trade as well as increasing cabotage.

Notes

- 1 For a discussion and a report on counting the costs in terms of insurance and war risk, see One Earth Future Foundation, The economic cost of Somali piracy of 2011, Working Paper, 2011, p. 14, http://oceansbeyondpiracy.org/sites/default/files/economic_cost_of_piracy_2011.pdf.
- 2 Following negotiations, the HRA was revised for the Indian Ocean, see Transmarine, Indian Ocean HRA changes effective May 2019, www.themecogroup.co.uk/transmarine-trade-disruption-insurance/publication/indian-ocean-hra-changes-effective-1-may-2019/.
- 3 A Longley, S Tobben and A Koh, War risk insurance premiums surge for oil tankers owners after Gulf attack, *Insurance Journal*, 17 June 2019, www.insurancejournal.com/news/international/2019/06/17/529537.htm.
- 4 The impact of the Gulf crisis on countries in the Horn of Africa have been far-reaching, see R Malley, What happens in the Gulf doesn't stay in the Gulf, International Crisis Group, 7 June 2018, www.crisisgroup.org/africa/horn-africa/somalia/what-happens-gulf-doesnt-stay-gulf.
- 5 UNSCR 1851 (2008) was unanimously adopted by the United Nations Security Council at its meeting on 16 December 2008, reaffirming international law as it applies to combating piracy and armed robbery at sea. See full text of UNSC Resolution 1851 at <http://unscr.com/en/resolutions/doc/1851>.
- 6 In December 2008, the European Union Naval Force (EUNAVFOR) drew on UNSCR 1816 and the EUNAVFOR Operation ATALANTA within the framework of the European Common Security and Defense Policy (CSDP), see <https://eunavfor.eu/mission/>. See also UNSCR 1816 p. 7 which authorises 'urgent assistance in securing the territorial and international waters off the coast of Somalia for the safe conduct of shipping and navigation.' www.refworld.org/docid/48464c622.html.
- 7 CMF 151 is a multinational maritime mechanisms which deals with counter-piracy operation in the Red Sea, Gulf of Aden and western Indian Ocean. See also About combined maritime forces, <https://combinedmaritimeforces.com/about/>.
- 8 The strategy is very comprehensive and views the security-development nexus as a pre-determinant and prelude factor to the development and wealth creation in the African maritime domain, see African Integrated Maritime Strategy 2050, p. 28, https://cggrps.com/wp-content/uploads/2050-AIM-Strategy_EN.pdf.
- 9 See an update on the status of signature and ratifications of The African Continental Free Trade Agreement (AfCFTA), www.tralac.org/resources/infographic/13795-status-of-afcfta-ratification.html.
- 10 AfCFTA, see www.uneca.org/publications/african-continental-free-trade-area-questions-answers.
- 11 See also AfCFTA: an update December 2019, p. 9, www.tralac.org/documents/resources/faqs/3079-african-continental-free-trade-area-faqs-december-2019-update/file.html.
- 12 See also United Nations Trade and Development Agency (UNCTAD), Maritime Piracy Part 1: an overview of trends, costs and trade-related implications, p. 24, https://unctad.org/en/PublicationsLibrary/dtlt1b2013d1_en.pdf.
- 13 See also United Nations Trade and Development Agency (UNCTAD), Maritime trade and Africa, 2018, <https://unctad.org/en/pages/PressRelease.aspx?OriginalVersionID=476>.
- 14 O Ruppel and D Biam, Taking back the seas: prospects for Africa's blue economy, ISS Paper 290, February 2016, <https://issafrica.s3.amazonaws.com/site/uploads/Paper290-3.pdf>.
- 15 Cabotage is defined as the right to operate sea, air and other transport services in a particular territory or country. See www.morethanshipping.com/an-overview-of-cabotage-laws-more-than-just-the-jones-act/.
- 16 Presentation by the Representative of the Ports Management Association of Eastern and Southern Africa (PMAESA) at the First Regional Maritime Council Inception Meeting, ISS-IGAD July 2019, Mombasa, Kenya, 10 July 2019.
- 17 The Northern Corridor refers to the existing road, rail and, at times, lake transportation networks in Uganda, Rwanda, the DRC, Burundi and South Sudan linking movement of goods to the Port of Mombasa, www.ttcanc.org/page.php?id=25.
- 18 There was an increase of insurance premiums as piracy incidences rose in 2008. This concerns High Risk Areas (HRA) because to date they have not been reviewed. HRAs in the Gulf of Aden are deemed the most dangerous parts of the global maritime routes. See N Amies, Shipping insurance sky-rockets as piracy increase, *Deutsche Welle*, 27 May 2009, www.dw.com/en/shipping-insurance-sky-rockets-as-pirate-attacks-increase/a-4278642.
- 19 MSC introduces war risk surcharge on shipments to Venezuela, *Offshore Energy*, 7 June 2019, <https://worldmaritimeneews.com/archives/278198/msc-introduces-war-risk-surcharge-on-shipments-to-venezuela/>.
- 20 IGAD's Integrated Maritime Safety and Security Strategy (IMSS 2015–2030), see https://igad.int/index.php?option=com_content&view=article&id=1049:draft-igad-integrated-maritime-safety-and-security-strategy-2030-&catid=45:peace-and-security&Itemid=128.
- 21 Short Sea Shipping (SSS) is the maritime transport of goods over relatively short distances as opposed to the intercontinental cross-ocean deep sea shipping, see [https://ec.europa.eu/eurostat/statistics-explained/index.php/Glossary:Short_sea_shipping_\(SSS\)](https://ec.europa.eu/eurostat/statistics-explained/index.php/Glossary:Short_sea_shipping_(SSS)).
- 22 There are constant discussions aimed at reviewing the maritime security by shipping industry watchdogs such as BIMCO and it is important to understand the review process, see Revision of piracy High Risk Area (HRA), <https://pib.gov.in/newsite/PrintRelease.aspx?relid=128560>.
- 23 See AfCFTA, <https://au.int/en/cfta>.

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This policy brief is funded by the Hanns Seidel Foundation. The ISS is also grateful for support from the members of the ISS Partnership Forum: the Hanns Seidel Foundation, the European Union, the Open Society Foundations and the governments of Canada, Denmark, Finland, Ireland, the Netherlands, Norway, Sweden and the USA.

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ISSN 2617-829X Print
ISSN 2617-8303 Digital



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