



POLICY BRIEF: SOUTH SUDAN

October 9, 2012

An analysis of political, economic, military and social trends defining the South Sudanese landscape in 2012



Historical Background



Much of South Sudan's history leading up to secession was marred by civil conflict with the Sudanese government. Originating from accusations that the government was intending to renege on intentions to create a federalist state upon independence from Egypt, southern rebels began a civil war lasting almost two decades from 1955-1972.¹ Conflict arose once again in 1983, lasting until a Comprehensive Peace Agreement (CPA) was signed in 2005. Over the course of this second civil war, it is estimated 1.5 million people died and up to 4.5 million were displaced.² Contingent upon the CPA (2005), a referendum to secede from Sudan was held in January 2011, with 98% in favour.³ The Republic of South Sudan gained independence from the Republic of Sudan on July 9, 2011.

Stakeholders



External

External	
Actor	Effects
International community	<p>(+) The AU has mediated between South Sudan and Sudan to peacefully resolve contested CPA issues: oil transit fees, security arrangements, the status of Abyei (and, as of September 27, 2012, the Mile 14), and the status of South Sudanese in Sudan.</p> <p>(+) IGAD led the pre-CPA negotiations between the Government of Sudan (GoSS) and the then SPLM/A, encourages the parties to resolve their disputes through dialogue to stave off a renewed outbreak of hostilities.</p> <p>(+) The UN and its specialized agencies are vital to GoSS nation-building efforts. Support the GoSS in humanitarian aid, development in all sectors, governance and rule of law; maintains a 6,663 strong peacekeeping force in the country plus 2,526 civilian personnel.⁴</p> <p>(+) The US actively supported the IGAD mediation that culminated in the CPA (2005); provides substantial financial support (the equivalent of €260 million per year) to the GoSS.⁵</p> <p>(+) EU is a major player with generous funding of GoSS (€260 million in 2011 to 2013).⁶</p> <p>(+) China has vested interests in South Sudan because it constructed the oil infrastructure and imports large quantities of South Sudanese oil. China encourages peaceful resolution of the dispute between South Sudan and Sudan.⁷</p>
Sudan	<p>(-) Sudan's sustained pressure on emerging South Sudan is driven by immediate domestic economic and security interests, and long-term territorial concerns. Sudan attempted to secure hefty oil transit fees, which South Sudan rejected and responded by shutting down oil production in January 2012, resulting in loss of revenues to Sudan. AU and IGAD intervened and brokered an agreement between the two governments on September 27, 2012. The risk of renewed fallout and military confrontation (by proxy or directly) looms unless the parties sincerely embrace dialogue as the only viable means to sustainably resolve the disputes.</p>
Other Regional Actors	<p>(+) Uganda: a large trading partner⁸ and collaborates with South Sudan collaborate in the security sector.</p> <p>(+) Kenya: on behalf of IGAD, mediated between Sudan and the then SPLM/A until the 2005 CPA was signed.⁹ Kenya is strategically important, as land-locked South Sudan imports and exports goods through the port of Mombasa, Kenya. Also, GoSS has signed an agreement with Kenya to construct oil infrastructure¹⁰ to export its oil through Lamu, Kenya. Kenyan government officials provide public service training to GoSS, and Kenya is an important trading partner and a supplier of skilled manpower to the private sector.</p> <p>(+) Ethiopia: As an upstream riparian country of the Blue Nile river, South Sudan is considered a strategic ally to Ethiopia in the latent dispute that may arise with Sudan and Egypt on the utilization of the Nile. South Sudan is seriously considering Ethiopia as one of the countries to build oil infrastructure to export its oil. Ethiopia deployed peacekeeping troops to the disputed Abyei area.</p> <p>(-/+) Egypt: concerned about developments in South Sudan as it heavily relies on the Nile waters for power generation and irrigated agriculture, and its interest in South Sudan is linked to the hydropolitics of the Nile waters¹¹. Egypt historically of opposed independence for hydropolitical considerations.</p>

Internal

Internal	
Actor	Effects
President: Salva Kiir Mayardit	<p>(+) A popular leader, owing to his role in the independence war for South Sudan. The President is shrewd and able to keep the multi-ethnic country glued together. The President wields significant power and respect within the military.¹²</p> <p>(+) Makes efforts for reconciliation with the opposition.</p> <p>(-) Encountering challenges to hold government officials accountable for their actions, especially in the management of public resources.</p>
Opposition in	The legislature is controlled by the SPLM, and the opposition has limited leverage to hold the government

Legislature	to account.
Armed opposition	(-) Armed opposition groups in different parts of the country are destabilising factors and engaging them in dialogue is the preferred option
Army, police, and Security Services	(+) The South Sudan military, the police force and the security are predominantly drawn from former SPLA fighters. The military proved its ability to defend in the recent confrontation against the Sudanese army in Heglig. ¹³ Instances of intimidation by police and security services have been reported
Ethnic groups and rural populations	(-) The GoSS focus has been on urban areas and there are complaints that some ethnic groups have limited access to power and wealth. This systemic problem must be addressed for the country's cohesion and progress. ¹⁴

Key Indicators



Very High Risk	High Risk	Medium Risk	Low Risk
SF-Stabilizing Factor		DF- Destabilizing Factor	AS- Assessment

History of Armed Conflict (Deteriorating)

DF	<p>Armed Conflict: The border with Sudan remains disputed, resulting in clashes between the states. However, the recent peace accords with Sudan, including an oil deal, created demilitarized buffers in the Southern Kordofan and Blue Nile regions.¹⁵ However, agreement over the Abeyi region was not reached in these Accords.¹⁶ Internally, rebel groups supported by the Sudanese government continue to launch attacks against the South Sudanese government.¹⁷ Significant inter-tribal violence between Lou Nuer and Murle in Jonglei state began in December 2011-January 2012. Fighting between the groups has been escalating once again in 2012.¹⁸</p> <p>Refugees Produced: The UNHCR reports an unknown number of refugees originating from South Sudan, as these individuals may be included in the statistics for Sudan. It does report 506,161 internally displaced persons as of January, 2012. In the Jonglei state, from independence to February 2012, over 100,000 people have been displaced.¹⁹</p> <p>Refugees Hosted: The UNHCR reports 206,078 refugees registered in South Sudan, as of October 2, 2012. This represents an increase of over 200,000 since December 31, 2011.²⁰ The vast majority of refugees originate from Sudan, representing 87.7% of the refugee population. Fighting between Sudanese government forces and rebels in the Blue Nile state has been cited as the cause of the influx.²¹</p>
AS	Persistent and seemingly escalating conflict between the Lou Nuer and Murle in the Jonglei state, along with the surge in refugees from Sudan over the past year, combines with ongoing minor conflicts and insecurities in 2012 to create a <u>deteriorating</u> , unstable situation. This instability is heightened given the fledgling state's limited capacities to respond to these issues. However, the recent accords with Sudan decreases the likelihood that the two states will engage in any major armed conflict in the near future.

Governance & Political Instability (Stable)

SF	<p>Level of democracy: The democratic experience of independent South Sudan is untested as the country has yet to hold its first elections as a sovereign nation. The Sudan People's Liberation Movement (SPLM) led South Sudan to independence and, by virtue of its legacy, exercises significant control over government, the political space and the economy.²² There is one opposition party, Sudan People's Liberation Movement for Democratic Change²³ (SPLM-DC), with limited influence.²⁴ Broad-based inclusion of all South Sudanese remains a challenge.</p> <p>Restrictions of Civil and Political Rights: South Sudanese have constitutional rights to form political organizations and engage in politics.²⁵ Civil liberties are enshrined in the Constitution and incidents of rights' violations were reported.²⁶</p> <p>Restrictions on Freedom of the Press: The press in South Sudan is free and the newspapers are owned by the private</p>
DF	<p>Rule of Law: South Sudan lacks the capacity and resources (human resources and administrative infrastructure) for checks and balances to fully operate and for the rule of law to prevail.²⁷</p> <p>Corruption: South Sudan inherited weak state administrative structures prone to mismanagement practices. The GoSS faces political challenges in making choices between maintaining internal ruling party cohesion at any cost and holding public servants accountable and enforcing difficult decisions.²⁸ Media outlets have reported, and the government has admitted to, serious corruption among public officials.²⁹</p>
AS	South Sudan, as a new country, encounters multiple challenges, but also holds opportunities, and it may be premature to predict which direction the country is headed in terms of governance and political stability. Key impediments are the less inclusive political space and corruption. The opposition complains of their inability to hold the government accountable, and ethnic groups express feelings of exclusion. ³⁰ The Government admitted that approximately US\$4 billion of public funds were misappropriated by officials. ³¹

Militarization (Likely deteriorating)

SF	DDR: South Sudan has developed a disarmament, demobilization and reintegration programme supported by UNMISS and UNDP, intended to reduce the armed forces to 150,000 personnel. However, Amnesty International reported the Sudan People's Liberation Army (SPLA), South Sudan's armed forces, have been committing human
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	rights abuses during the disarmament process in the country's eastern region. ³²
DF	Armed Forces: The Small Arms Survey estimates South Sudan's armed forces to number approximately 20 personnel per 1,000 people (210,000). ³³ The SPLA is being transitioned into the country's armed forces.
AS	The absence of data on military spending makes an assessment of the status of militarization in South Sudan difficult. Donor perception that the government is recruiting new combatants could suggest militarization is increasing, possibly in response to ongoing conflict with Sudan and internal rebel activity. Reports of SPLA human rights abuses in the east do not suggest the military has stabilized internal control over its personnel and civilian distrust is likely to increase if abuses continue.
Population Heterogeneity (Deteriorating)	
SF	Religious groups: A majority practice traditional religions, with a minority Christian population. ³⁴ "There were no reports of societal abuses or discrimination based on religious affiliation, belief, or practice." ³⁵
DF	Ethnic groups: There are over 60 ethnic groups. Exclusion: The government is dominated by ethnic Dinka. ³⁶ The lack of national cohesion is blamed on exclusion from the national platform, including government jobs. ³⁷ Many minority ethnic groups feel that their interests are not being represented politically. ³⁸ Ethnic conflict: Ethnic clashes were occurring in 7 of 10 states, as of October 2011. ³⁹ In Jonglei state, there have been decades of inter-communal violence related to cattle grazing and raiding. The situation is worsening as of October 2012, with medical charity, Médecins Sans Frontières fearing that they will have to further reduce operations due to the violence.
AS	Ethnic conflict and the lack of national cohesion are major problems in South Sudan, impacting the country's stability. The inaccessibility of remote areas and weak governance make rule of law in these areas limited, allowing ethnic conflict to be pervasive.
Demographic Stress (Deteriorating)	
DF	Population and growth: A July 2012 estimate of the population stood at 10,625,176 ⁴⁰ - up from 8.26 million in February 2011. ⁴¹ None of the public infrastructure required to for this growth is in place. ⁴² Urban Population: There is no up-to-date information about urban population. In 2009, the portion of the population living in urban areas was 22%. ⁴³ A predominantly rural population is problematic as 60% of remote locations are inaccessible during the rainy season. ⁴⁴ Youth Bulge: A significant proportion of the population is young. 44.4% of the population is 14 years of age or under. ⁴⁵
AS	There has been a significant increase in South Sudan's population since independence. However, now that the "grace period" for South Sudanese in Sudan to sort out citizenship status has expired, ⁴⁶ the high growth rate is likely to drop. Yet, without the infrastructure in place to handle the larger population, access to resources and public services is likely to deteriorate. Moreover, a predominantly young population places further stress on the limited infrastructure and state resources.
Economic Performance (Likely Improving)	
SF	GDP Per Capita: In August 2011, South Sudan GDP was US\$ 1,546, ⁴⁷ the highest in East Africa. This is expected to have dropped sharply after GoSS suspended oil exports in January 2012. Total debt Service, FDI,⁴⁸ Trade Openness: No data available.
DF	GDP Growth Rate⁴⁹: Growth expected to have declined because the GoSS shut down oil production. Oil exports amounted to 71% of GDP, and oil revenue accounted for almost 98% of total Government revenue. ⁵⁰ However, a newly signed accord with Sudan may see oil production started up again, which will hopefully alleviate some economic challenges. Inflation: Inflation rising since GoSS shut down oil production in January 2012. In May 2012, inflation soared to a record high of 79.5% but in June 2012 dropped slightly to a 74.1% year-on-year increase since June 2011. ⁵¹ Official Exchange Rate: Exchange rate was US\$1 = SSP 3.55. In July 2012 (after suspension of oil exports) US\$1 = SSP 6. GoSS is in danger of running out of US Dollars. ⁵² Inequality Score (GINI Coefficient): No World Bank data available. Huge poverty and consumption disparities exist between the rural and urban residents, and between the poor and the non-poor. ⁵³
AS	The South Sudanese economy is on a brink of major crisis. The suspension of oil exports depleted GoSS US Dollar reserves. Food and fuel prices are skyrocketing (an 80% inflation in one year); delays are experienced in payment of salaries of public servants and contractors. Vital social service projects are being scaled down. Ongoing development projects are in jeopardy as the GoSS may fail to honor contractual commitments to partners. The biggest threat resides in the spread of economic hardships to the military, an entity that has played a central political role. The stakes are too high that GoSS must fulfill its share of the South Sudan/Sudan agreement signed in Addis Ababa, Ethiopia, on September 27, 2012.
Human Development (Unknown Trend)	
DF	Education and Literacy: South Sudan has a very poor literacy rate of 27% (40% male, 16% female literacy), ⁵⁴ which can be attributed to the many years of war the country faced. ⁵⁵ Only 10% of students enrolled complete primary school. ⁵⁶ Nearly half of civil servants only have primary education. ⁵⁷ Poverty: Poverty is widespread in South Sudan, with at least 80% of the population living on less than US\$1 per day. ⁵⁸ Life expectancy and infant mortality rates: There are no recent statistics on life expectancy. It is estimated that for 2012, the infant mortality rate was 71.83 deaths/1,000 live births (19 th highest in the world). ⁵⁹

	Health :The UN reports that only 40% of people in South Sudan have access to health care. ⁶⁰ Improved water source and food security : Only 55% of people in South Sudan have access to an improved water source. ⁶¹ Moreover, over one third of the population lacks secure access to food. ⁶²
AS	Due to the recent independence of South Sudan, there is not sufficient baseline data to confidently identify trends, however the available data indicates that the level of human development in South Sudan is very low. The GoSS places an emphasis on military and civil service spending, to the detriment of social services, as compared to other countries in the region. ⁶³
Environmental Stress (Stable)	
SF	People per square kilometre of Arable Land : The Ministry of Agriculture and Forestry reports South Sudan as having approximately 33 square kilometres per person. ⁶⁴
DF	Rate of Deforestation : The UN Food and Agricultural Organization (FAO) reported in 2010 a deforestation rate of up to 2,776 square kilometres annually. ⁶⁵ The UN Environment Programme (UNEP) estimates 70% of forest cover has been lost in the north and south due to conflict, as well as agricultural activity. ⁶⁶ Flooding : Floods in 2012 damaged crops and reduced the quantity of arable land. ⁶⁷
AS	Deforestation is both a positive and negative indicator, showing a return to regular farming practices, but also continuing conflict in some areas, and the resultant environmental degradation that could lead to drought. ⁶⁸ A reduction in the quantity of arable land in certain areas due to heavy flooding in 2012, has created conditions of increased food insecurity. ⁶⁹ While these impacts are important in the short term, they do not suggest a deteriorating environmental situation overall.
International Linkages (Stable)	
SF	International Organizations : South Sudan's membership in economic organizations is limited. South Sudan is a member of UNCTAD, ⁷⁰ the World Bank, the IMF, AU, IFRCs, Interpol, ITU, UN, UNCTAD, UNESCO, UPU. Foreign Relations : South Sudan, despite its newness to the craft of diplomacy, established its reputation as a credible partner in international relations.
DF	International Disputes : South Sudan is not involved in any international disputes, except with Sudan.
AS	GoSS created and maintained regional, continental and international alliances that served South Sudan's national interests in the most recent standoff with the Sudan.

Scenarios



Best

South Sudan and Sudan will immediately implement the September 27, 2012 Agreement signed in Addis Ababa, Ethiopia, for the GoSS to resume generating oil revenues, stave off the impending deep economic crisis, and maintain peace with Sudan. South Sudan and Sudan will reach an agreement over the Abyei region during further AU mediations that have been planned. Both sides will observe the demilitarized buffers in South Kordofan and the Blue Nile established in the recent Accords. A decreased threat from Sudan may result in a shift in spending from military and the civil service to social services. GoSS will opt for the difficult choice of adopting policies that preserve and promote national cohesion by opening up opportunities for wider and meaningful participation of South Sudan to equitably share in the political and economic dividends of independent South Sudan. The GoSS will develop capacity to administer the rule of law in the country, particularly in the Jonglei state, to prevent future escalation of hostilities. GoSS will effectively combat corruption and pursue equitable sustainable development. This strategy will put South Sudan on the path to solid national unity, stability, security, and prosperity.

Worst

The September 27, 2012 Agreement will not be implemented plunging the GoSS in deep economic crisis. Hostilities (proxy or direct) will break out with Sudan, no resolution to the Abyei question will occur, armed internal rebellion will escalate, and insecurity will deteriorate. Simultaneous urgent demands of war and peace priorities will compete for dwindling resources. GoSS will continue its indifference to grievances of domestic constituents (opposition party and ethnic groups). Dangerous tensions will arise within the ruling party, threatening stability. Corruption will go unchecked and accelerate economic deterioration. Development initiatives will be shelved. Unless the regional and international community steps in, South Sudan will again face an uncertain future.

Most Likely

Sudan and South Sudan will begrudgingly implement the September 27, 2012 Agreement signed in Addis Ababa, Ethiopia, and the two countries will maintain the current status quo. Mediation over the Abyei question will be long and drawn out, with limited prospect for a long-term solution. GoSS will resume generating oil revenues, continue mishandling ethnic grievances instead of addressing the root causes, limit political space to dissidents and opponents, pay lip service to corruption, and encourage slow inequitable national development, mainly with donor funding. It is in the strategic interests of GoSS to chart new strategies to gradually reduce donor dependency and to prioritise sustainable development that equitably shares the political and economic benefits of independent South Sudan with all its citizens.

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<<http://reliefweb.int/sites/reliefweb.int/files/resources/OCHA%20South%20Sudan%20Weekly%20Humanitarian%20Bulletin%2024-30%20September%202012.pdf>> See also: "South Sudan Food Security Update," *South Sudan National Bureau of Statistics*, 26 Sept. 2012, Web. 06 Oct. 2012, <http://www.southsudan-climis.org/attachements/Food_Security_Update_August_Sept_2012.pdf>

⁶⁵ Charlton Doki, "Forests Dying in South Sudan Violence," *ReliefWeb*, 26 May 2012, Web, 04 Oct. 2012,

<<http://reliefweb.int/report/south-sudan-republic/forests-dying-south-sudan-violence>>

⁶⁶ UNEP, "South Sudan- Forests," *United Nations Environmental Programme*, Web, 08 Oct. 2012,

<<http://www.unep.org/southsudan/>>

⁶⁷ OCHA, 20 Sept 2012; See also: SSNBS, *Update on Food Security*, 2012

⁶⁸ Doki, 2012

⁶⁹ OCHA, 20 Sept 2012; See also: SSNBS, *Update on Food Security*, 2012

⁷⁰ CIA, 2012