

## AFRICA RISK CONSULTING

### Ethiopia Monthly Briefing January 2021

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#### Ethiopia Summary 13 January 2021

*Ethiopia's National Electoral Board announces that parliamentary elections, originally slated for August 2020, will be held on 5 June. Significant developments over the conflict between Ethiopia's federal government and the Tigray People's Liberation Front (TPLF) are limited but Ethiopian security forces have captured several prominent TPLF figures. The whereabouts of TPLF leader Debretsion Gebremichael remain unclear. The primary security focus in Ethiopia has instead been on reports of inter-communal violence and alleged clashes between military elements on the Ethiopia-Sudan border. As a result, border disputes with Sudan have reignited, with potential to add complication to the Grand Ethiopian Renaissance Dam (GERD) issue. Ethiopia has begun trading under African Continental Free Trade Area (AfCFTA) rules. Ethiopia's economic outlook for 2021 looks more positive than initial projections, although concerns over complacency over Covid-19 and its impacts are growing.*

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#### Election announcement adds complexity to Tigray crisis

Ethiopia's National Electoral Board announced on 25 December that last year's delayed parliamentary elections would be held on 5 June 2021.<sup>1</sup> The much-anticipated elections were originally slated for August 2020 but prime minister **Abiy Ahmed** (2018-present) postponed them in March 2020, citing **Covid-19** as the reason for the delay.<sup>2</sup> In reality, Covid-19 provided an excuse rather than a reason for the delay. The key difficulties facing Abiy ahead of the original date still pose a challenge, with the lack of a real resolution to the **Tigray** crisis creating greater uncertainty.

The current election plans do not include Tigray.<sup>3</sup> The comprehensive political reintegration of Tigray region, which held its own illegal polls in September, sparking conflict between the federal government and Tigray's regional government, remains a fundamental challenge. A date for parliamentary elections in Tigray will reportedly only be set once Tigray's interim government has opened election offices in the region.<sup>4</sup> However, the setting of an election date provides a tight timeline for reintegrating opposition elements in Tigray region to bring comprehensive, long-term peace. The Ethiopian government can either press on without opposition Tigrayan elements, shutting them out of all government, or seek to integrate key Tigrayan elements to find a longer-term and workable peace option. This is why the date for an election in Tigray is yet to be confirmed. At the moment, the first is the most likely option given the legitimacy being handed to the interim Tigrayan government established by the federal government.

The challenge remains the level of unity within Abiy's loose coalition, the ruling **Prosperity Party**. The party, a conglomerate of almost every ethnic party excluding the **Tigray People's Liberation Front (TPLF)**, will almost certainly win the election. The more important issue is how Abiy's coalition is managed and whether constituent parties break away.<sup>5</sup> The only scenario in which Abiy does not retain power in June is one in which parties break away or move against Abiy.

The announcement of an election has already prompted criticism, notably by opposition parties wanting peace before an election. For example, the **Oromo Federalist Congress (OFC)** has said it

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<sup>1</sup> Addis Standard, 25 Dec 2020

<sup>2</sup> Fana, 31 Mar 2020

<sup>3</sup> Borkena, 25 Dec 2020

<sup>4</sup> Reuters, 25 Dec 2020

<sup>5</sup> The Africa Report, 15 Dec 2020

would be difficult to participate in the election given many of its members and supporters have been arrested.<sup>6</sup> The party made a similar statement in December 2019 ahead of the election originally slated for August 2020.<sup>7</sup> Disruptive efforts by other regions within Ethiopia's ethnic federalist system are likely in the run-up to the June election, especially if rebelling Tigrayan elements are perceived to be offered concessions for their political integration before June. With many opposition party members remaining in prison, pressure for their release is likely to mount with any releases likely to come as concessions for furthering political support to Abiy and his coalition.<sup>8</sup> Meanwhile, inter-communal violence is already rising and likely to further accelerate ahead of the election.

Further changes in the election plan are a reasonable possibility, given the current themes in the region (see below). Neighbouring **Somalia** cited Covid-19 to delay its election by 13 months and deemed Covid-19 a complication that would make the promised move to a 'one person, one vote' system too difficult. Similarly, Covid-19 is likely to slow the transition from military to civilian rule in another neighbour, **Sudan**. With no clear indication of when a vote will take place in Tigray, changes to Ethiopia's election and its implementation seem likely.

### **Border hostilities with Sudan are becoming increasingly politicised**

The security focus in the past month has shifted from the Tigray region to Sudan amid reports of armed clashes on Ethiopia's border with Sudan. In Tigray region the threat environment has improved in both eastern and western areas.<sup>9</sup> Sudanese security forces on 16 December reportedly 'recaptured' border areas that Ethiopia claims are part of the **Benishangul-Gumuz** region, following armed clashes.<sup>10</sup> This followed Sudanese allegations the day before that "*Ethiopian forces and militias*" had ambushed Sudanese troops on a security patrol in the area.<sup>11</sup> The initial hostilities have prompted violent clashes and increased diplomatic hostilities between **Khartoum** and **Addis Ababa**.

There was already a heightened Sudanese security presence along the border with Benishangul-Gumuz. In response to the Tigray crisis, 6,000 security Sudanese forces had already deployed to the area.<sup>12</sup> Similarly, the Ethiopian formal security force presence on the Sudanese border had been reduced in November to relocate forces to Tigray. However, Ethiopian peacekeeping force withdrawals, worth 800 troops, from Sudan's **Darfur** region, were already planned as part of drawdowns in the **United Nations–African Union Mission in the Darfur region of Sudan (UNAMID)**, rather than in response to allegations of hostilities.<sup>13</sup>

Since the initial claims of attacks there has been a cycle of accusation and denial from both the Ethiopian and Sudanese governments.<sup>14</sup> Central to the problem remains the confusion over what constitutes 'armed forces'. The attacks are highly unlikely to be centrally organised military forces from either Sudan or Ethiopia. There is a history of inter-communal cross-border clashes between farmers and militia groups associated with different communities in Benishangul-Gumuz and Sudan's neighbouring **Gambella** province. Reports within western media claiming that this was a military invasion are most likely embellished.

However, if the border violence issue is allowed to become politicised, it could have significant consequences for Ethiopia. Prime minister Abiy Ahmed needs to court Sudan's favour over the **Grand Ethiopian Renaissance Dam (GERD)** issue to prevent a Sudan-Egypt bloc, which would depict Ethiopia as the disruptor to an increasingly regional and international diplomatic audience. Sudan has already shown its increased acrimony towards the GERD process by failing to attend tripartite talks.<sup>15</sup>

<sup>6</sup> Addis Standard, 9 Jan 2021

<sup>7</sup> Addis Standard, 9 Jan 2021

<sup>8</sup> The East African, 28 Dec 2020

<sup>9</sup> UN OCHA, 6 Jan 2021

<sup>10</sup> Middle East Monitor, 17 Dec 2020

<sup>11</sup> Sudan Tribune, 16 Dec 2020

<sup>12</sup> Middle East Monitor, 17 Dec 2020

<sup>13</sup> The Reporter Ethiopia, 31 Dec 2020

<sup>14</sup> Addis Standard, 12 Jan 2021

<sup>15</sup> Addis Standard, 5 Jan 2021

If the border issue is politicised, it could become a complicating dynamic or bargaining chip for Sudan in its GERD talks with Ethiopia.

### Likely delay in impact and benefit of AfCFTA

Trading rules under the **African Continental Free Trade Area (AfCFTA)** agreement commenced on 1 January, although largely only symbolically. There is likely to be a delay before the impact of the free trade agreement is felt. In the first stage of implementation, members are required to adhere to tariff liberalisation and harmonising trading rules, notably the removal of tariffs from 90% of goods.<sup>16</sup> Ethiopia has historically had a protectionist tariff policy but in theory AfCFTA is supposed to accelerate trade policy liberalisation.

Information on how Ethiopia intends to meet the new intra-Africa trading rules has yet to be fully outlined. Prime minister Abiy Ahmed welcomed the beginning of the new trading rules, tweeting that:

*“Boosting trade in terms of respect and equal opportunity helps to defuse the tensest relationships, generates prosperity, revitalizes pan-Africanism and favors [sic] peace.”<sup>17</sup>*

Most African countries are not ready to implement the agreement.<sup>18</sup> Despite the July deadline for tariff reductions, the process is quietly expected to take many years. Only 41 of AfCFTA’s 54 members have submitted tariff reduction schedules and there are no serious consequences for failing to meet the deadline for tariff-reduction schedules.<sup>19</sup> Ethiopia is no exception. AfCFTA secretary general **Wamkele Mene** commented that it could take years for countries to align their laws accordingly, with Ethiopia’s restrictions on foreign direct investment into its financial sector a notable breach of the existing agreement.<sup>20</sup>

Intra-continental trade in Africa remains low with Ethiopia’s lack of bilateral trade with regional neighbours historically low. For example, Ethiopia’s trade with the other large economy in the region, **Kenya**, constituted only \$70m in 2019, equal to 0.5% of Ethiopia’s total exports.<sup>21</sup> Similarly, Ethiopia has already been reluctant to remove protectionism within regional economic blocs, such as Ethiopia’s limited commitment to the **Common Market for Eastern and Southern Africa (COMESA)**.<sup>22</sup> There are growing concerns that if countries fail to implement the requirements for AfCFTA the agreement could be undermined.

However, Ethiopia has already made efforts to liberalise trade with Kenya, such as the establishment of one-stop border posts, most recently in December.<sup>23</sup> Such moves are enough to show liberalisation efforts, but Ethiopia is unlikely to significantly remove protectionist measures in the next six months, especially given the focus on political stability ahead of the election. The Tigray crisis and Covid-19 both act as legitimate narrative justifications to a lack of progress towards the comprehensive removal of protectionist measures. Liberalisation efforts are likely to take place on Abiy’s terms rather than those dictated by AfCFTA.

As a result, any significant benefits from AfCFTA for Ethiopia are unlikely to be realised in the short term with domestic economic liberalisation and privatisation remaining the main focus for Abiy’s government in 2021. Abiy’s regime remains committed to privatisation, most notably of Ethiopia’s state-owned telecommunications monopoly, **Ethio Telecom**. The original deadline for Ethio Telecom to privatise a 40% stake in the company remains set for April, but it is conceivable that this could be pushed back.<sup>24</sup> Interest in Ethio Telecom is likely to accelerate in the coming months, with **Chinese**

<sup>16</sup> African Union, 30 May 2019

<sup>17</sup> Dateline Africa, 1 Jan 2021

<sup>18</sup> FT, 29 Dec 2020

<sup>19</sup> Nairametrics, 11 Jan 2020

<sup>20</sup> FT, 29 Dec 2020

<sup>21</sup> Brookings, 20 Oct 2020

<sup>22</sup> Brookings, 20 Oct 2020

<sup>23</sup> New Business Ethiopia, 10 Dec 2020

<sup>24</sup> FT, 6 Dec 2020

technology giant **Huawei** rumoured to be the latest magnate interested in Ethio Telecom.<sup>25</sup> Given the desire to move the privatisation of Ethio Telecom forward ahead of June's election and while the Tigray crisis is contained, this is likely to remain the principal economic focus for the Ethiopian government this quarter rather than AfCFTA compliance.

### Concerns over pandemic complacency but numbers steady

Focusing on Covid-19, Ethiopia has one of the highest Covid-19 caseloads on the continent, although the daily rate of cases is currently falling. As of 12 January, the number of confirmed cases in Ethiopia was over 128,000 with 2,003 Covid-19-related deaths.<sup>26</sup> However, with a population of over 109 million people, the government's containment of the virus has been widely praised.<sup>27</sup> Ethiopia's response, particularly awareness campaigns, testing and tracing, have been viewed favourably internationally, since the beginning of the pandemic.<sup>28</sup> The government's handling of the pandemic has not come under significant domestic scrutiny either, despite the hardship caused by social distancing measures and the economic downturn. The ongoing Tigray crisis has helped to prevent Covid-19 becoming a politicised issue within the domestic political narrative.

However, there is growing concern within Ethiopia's health ministry over the level of compliance with Covid-19 guidelines.<sup>29</sup> Health minister **Sahrela Abdulahi** reportedly claimed that both private and public institutions need to have greater accountability in implementing Covid-19 guidelines.<sup>30</sup> The Ethiopian government is expected to outline a new six-month action plan to counteract Covid-19 this month, including the compulsory wearing of face masks and an upscale in awareness campaigns over wearing masks and washing hands.<sup>31</sup> Public gatherings, notably protests, will almost certainly remain banned in the run up to the election. In this sense, Covid-19 is likely to remain a justification for preventing opposition elements organising ahead of the polls.

The impact of the Tigray crisis on the spread of the disease remains a growing concern. A **United Nations (UN)** report released on 7 January outlined fears over the risk for a "*massive community transmission*" of Covid-19 in Tigray given the level of displacement from the conflict.<sup>32</sup> Data on Covid-19 remains limited, health facilities have been damaged or looted by the fighting and travel within the region continues to be difficult, making any response to a potential spike in the region very difficult.

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<sup>25</sup> Addis Standard, 12 Jan 2021

<sup>26</sup> Ministry of Health, 12 Jan 2021

<sup>27</sup> World Bank, 9 Nov 2019

<sup>28</sup> FT, 27 May 2020

<sup>29</sup> Ethiopian News Agency, 8 Jan 2021

<sup>30</sup> Ethiopian News Agency, 8 Jan 2021

<sup>31</sup> Ethiopian News Agency, 8 Jan 2021

<sup>32</sup> UN OCHA, 7 Jan 2021

## Planner

April 2021 **(Ethiopia)** Deadline for **Ethio Telecom** to privatise a 40% stake in the state-owned company;

6 Jun 2021 **(Ethiopia)** Parliamentary elections (excluding Tigray region);

July 2021 **(Africa)** Deadline for **African Continental Free Trade Area (AfCFTA)** trade tariff reductions in 90% of goods

## Chronology

13 Jan 2021 **Addis Ababa (Ethiopia)** *Ethiopian News Agency*. The **Ethiopian Investment Commission** introduces a web platform for tracking foreign direct investment inflows into the country to improve access to investment data;

12 Jan 2021 **Benishangul-Gumuz (Ethiopia)** *Addis Standard*. Ethiopia's **Ministry of Foreign Affairs** accuses the government of **Sudan** of continuing to inflame border tensions;

12 Jan 2021 **Addis Ababa (Ethiopia)** *Business Day*. **Chinese** technology giant **Huawei** confirms interest in Ethiopia's state-owned telecommunications monopoly, **Ethio Telecom**;

11 Jan 2021 **Amhara (Ethiopia)** *Egypt Independent*. Construction on a \$125m dam begins in **North Shewa**, Amhara. The 45m high **Chinese**-built dam is due to be completed within three years;

10 Jan 2021 **Benishangul-Gumuz (Ethiopia)** *Middle East Monitor*. The **Sudanese** government claims to possess documents showing **Ethiopia's** acknowledgement of disputed border territories as Sudanese territory;

10 Jan 2021 **Addis Ababa (Ethiopia)** *SUNA*. The **African Union (AU)** confirms the failure of the latest instalment of talks over the **Grand Ethiopian Renaissance Dam (GERD)**;

9 Jan 2021 **Addis Ababa (Ethiopia)** *The Reporter Ethiopia*. **United States**-based aircraft manufacturer **Boeing** announces compensation worth \$1.4m per victim as compensation to the families of the **Ethiopian Airlines** Flight 302 crash in March 2019;

9 Jan 2021 **Oromia (Ethiopia)** *The Reporter Ethiopia*. The **Oromo Federalist Congress (OFC)** claims that it will find it "very difficult" to participate in June's election given many of its members and supporters have been arrested;

8 Jan 2021 **Tigray (Ethiopia)** *Borkena* Ethiopian forces capture six senior members of the **Tigray People's Liberation Front (TPLF)**, including TPLF founders **Sebhat Nega**, in a security operation;

8 Jan 2021 **Addis Ababa (Ethiopia)** *Ethiopian News Agency*. The health ministry announces greater accountability on institutions deemed to have broken **Covid-19** guidelines amid concerns over growing negligence;

7 Jan 2021 **Tigray (Ethiopia)** *Borkena*. Ethiopian armed forces reportedly kill four senior members of the **Tigray People's Liberation Front (TPLF)**, including the head of foreign relations for the group, **Sekoture Getachew**, and arrest nine other TPLF officials;

5 Jan 2021 **Benishangul-Gumuz (Ethiopia)** *Addis Standard*. **Sudan** fails to attend virtual talks between the water ministries of **Ethiopia** and **Egypt** over the **Grand Ethiopian Renaissance Dam (GERD)** after the other parties reportedly ignored Sudan's calls for **African Union (AU)** involvement;

4 Jan 2021 **Tigray (Ethiopia)** *The Reporter Ethiopia*. The Ethiopian government commits to repairing the 7th century **al-Nejashi mosque**, a site of significance in **Islam** believed to contain the remains of 15 disciples of the **Prophet Muhammed**, after shelling reportedly damaged the

building ;

3 Jan 2021 **Addis Ababa (Ethiopia)** *Asharq al-Aswat*. Talks between **Ethiopia, Egypt** and **Sudan** over the **Grand Ethiopian Renaissance Dam (GERD)** recommence;

2 Jan 2021 **Afar (Ethiopia)** *Ethiopian News Agency*. The **Ethiopian Railway Corporation** signs a memorandum of understanding with a **Chinese** engineering group to construct a railway line to link the **Awash** petroleum plant with the main **Ethio-Djibouti** rail line;

1 Jan 2021 **Addis Ababa (Ethiopia)** *The East African*. Trading under the **African Continental Free Trade Area (AfCFTA)** begins, creating the world's largest free trade area, although many of the liberalisation requirements are still to be met;

31 Dec 2020 **Benishangul-Gumuz (Ethiopia)** *Borkena*. The head of **Sudan's** transitional sovereign council, **Abdel Fattah al-Burhan**, denies claims that Sudanese armed forces crossed into Ethiopian territory;

31 Dec 2020 **Addis Ababa (Ethiopia)** *The Reporter Ethiopia*. **Ethiopia's** 800-strong peacekeeping force in **Sudan** set to return to Ethiopia as its mandate as part of the **United Nations–African Union Mission in the Darfur region of Sudan (UNAMID)** comes to an end;

31 Dec 2020 **Oromo (Ethiopia)** *Borkena*. The **Ethiopian Human Rights Commission (EHRC)** releases a statement finding the inter-communal violence which followed the killing of the musician **Hachalu Hundessa** in June to have constituted “*crimes against humanity*”;

31 Dec 2020 **Addis Ababa (Ethiopia)** *Addis Standard*. **Ethiopia's** foreign affairs ministry denies reports that **Egypt's** government summoned Ethiopia's chargé d'affaires in **Cairo**;

30 Dec 2020 **Somali (Ethiopia)** *FAO*. The **Food and Agriculture Organization (FAO)** issues warning over risk to agriculture posed by maturing locust populations in **Somali, Oromia** and the **Southern Nations, Nationalities, and Peoples' Region (SNNPR)**;

30 Dec 2020 **Addis Ababa (Ethiopia)** *Borkena*. Ethiopia's foreign affairs ministry introduces a two-month social media campaign called **#RisingEthiopia** to mobilise and encourage investment from the Ethiopian diaspora;

29 Dec 2020 **Benishangul-Gumuz (Ethiopia)** *Ahram Online*. The Ethiopian government calls for dialogue with **Sudan**, with Sudanese forces allegedly retaking border areas purportedly previously held by Ethiopian forces;

28 Dec 2020 **Tigray (Ethiopia)** *France 24*. **World Health Organization (WHO)** head **Tedros Adhanom Ghebreyesus** speaks of his “*personal pain*” over the deteriorating conflict in his home region of **Tigray**;

28 Dec 2020 **Addis Ababa (Ethiopia)** *Reuters*. News agency **Reuters** condemns the arrest on 24 December by Ethiopian police forces of one of its cameramen covering the **Tigray** conflict ;

27 Dec 2020 **Afar (Ethiopia)** *Borkena*. Officials from **Ethiopia** and **Djibouti** commit to fast-tracking the **Dikhil-Daguru** road to increase capacity for cooperation with Djibouti's port capabilities;

26 Dec 2020 **Tigray (Ethiopia)** *The Reporter Ethiopia*. Businesses in **Tigray** region request financial support from the trade and industry ministry in response to the economic hardship created by the conflict;

25 Dec 2020 **Addis Ababa (Ethiopia)** *Borkena*. **Baladera Party for Genuine Democracy** leader **Eskinder Nega** appears in court and pleads not guilty to charges of inciting inter-communal violence in **Addis Ababa** during June's unrest;

25 Dec 2020 **Addis Ababa (Ethiopia)** *Anadolu Agency*. Two senior members of **Colonel Mengistu Haile Mariam's** regime (1977-1991), **Berhanu Bayeh** and **Addis Tedla**, are

pardoned for alleged genocide involvement after spending 29 years in **Italy's** embassy in **Addis Ababa** seeking asylum;

25 Dec 2020 **Addis Ababa (Ethiopia)** *Bloomberg*. **Ethiopia's** government announces election plans, with the parliamentary election slated for 5 June, except for **Tigray** region where the date for a Tigrayan vote will be set once **Tigray's** current interim government opens election offices in the region ;

24 Dec 2020 **Tigray (Ethiopia)** *Ethiopian News Agency*. **Tigray's** provisional government announces its 11-member cabinet which will govern Tigray until the next election;

24 Dec 2020 **Benishangul-Gumuz (Ethiopia)** *Anadolu Agency*. At least five government officials arrested on allegations of organising violence against **Amharan** civilians in western **Benishangul-Gumuz**;

23 Dec 2020 **Benishangul-Gumuz (Ethiopia)** *Addis Standard*. Unknown attackers reportedly kill over 100 people in an attack near **Bulen** town, likely motivated by inter-communal tension;

22 Dec 2020 **Tigray (Ethiopia)** *UNCERF*. The **United Nations (UN)** releases emergency funds worth \$35.6m for humanitarian assistance in **Tigray**;

21 Dec 2020 **Addis Ababa (Ethiopia)** *Asharq al-Aswat*. Prime minister **Abiy Ahmed** and **Sudan's** prime minister, **Abdalla Hamdok**, hold sideline meetings in **Djibouti** on recent violence on the **Ethiopia-Sudan** border;

20 Dec 2020 **Benishangul-Gumuz (Ethiopia)** *Borkena*. **Sudan** deploys troops along its border with **Ethiopia** with the Sudanese government announcing planned talks with Ethiopian counterparts;

18 Dec 2020 **Tigray (Ethiopia)** *Africa News*. **Tigray People's Liberation Front (TPLF)** leader **Debretsion Gebremichael** remains on the run with Ethiopian army announcing a \$250,000 reward for information leading to the capture of the TPLF's senior leadership;

17 Dec 2020 **Benishangul-Gumuz (Ethiopia)** *Middle East Monitor*. **Sudanese** security forces reportedly recapture border areas occupied by Ethiopian farmers in the border areas following armed clashes;

16 Dec 2020 **Benishangul-Gumuz (Ethiopia)** *Sudan Tribune*. **Sudan's** armed forces claim that "*Ethiopian forces and militias*" ambushed Sudanese troops on a security patrol in the border areas;

16 Dec 2020 **Tigray (Ethiopia)** *Reuters*. The **European Union (EU)** postpones financial support to the Ethiopian government worth \$90m over the federal government's alleged restriction of humanitarian aid into **Tigray**;

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