

WINNER OR LOSER OF THE NILE RIVER BASIN? THE ECONOMIC ROLE OF SUDAN IN THE NILE REGION

A NÍLUS-VÖLGYE VESZTESE VAGY NYERTESE? SZUDÁN GAZDASÁGI SZEREPE A NÍLUS-VÖLGYE RÉGIÓBAN

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Abstract

The aim of this study is to provide basic information about the situation of Sudan and South Sudan in the Nile River Basin after their split in 2011. The investigation happened through a secondary research of documents and data concerning the two new countries and its surrounding area. It was found that the two Sudanese countries have long and bloody history, and their present is not quite peaceful either. However, by taking key steps to consolidate the political and economic situation, their future can be peaceful and prosperous, although it is likely that only on the long run.

Key words

Sudan. South Sudan. Economy. Geopolitics. Introduction.

Absztrakt

A kutatás célja, hogy alapvető információkat nyújtson Szudán és Dél-Szudán a Nílus folyó völgyében betöltött szerepéről, miután 2011-ben kettéváltak. A vizsgálat szekunder kutatás útján történt, mely során a két új országra és a környező területre vonatkozó dokumentumok és adatok kerültek megvizsgálásra. A szerzők megállapították, hogy a két ország múltja hosszú és véres, és manapság jellemzi őket béke. Azonban, a megfelelő lépéseket megtéve a politikai és gazdasági helyzet konszolidálására, a két ország jövője békés és prosperáló lehet, igaz, valószínűleg nem a közeljövőben.

Kulcsszavak

Szudán. Dél-Szudán. Gazdaság. Geopolitika. Bemutató.

Introduction

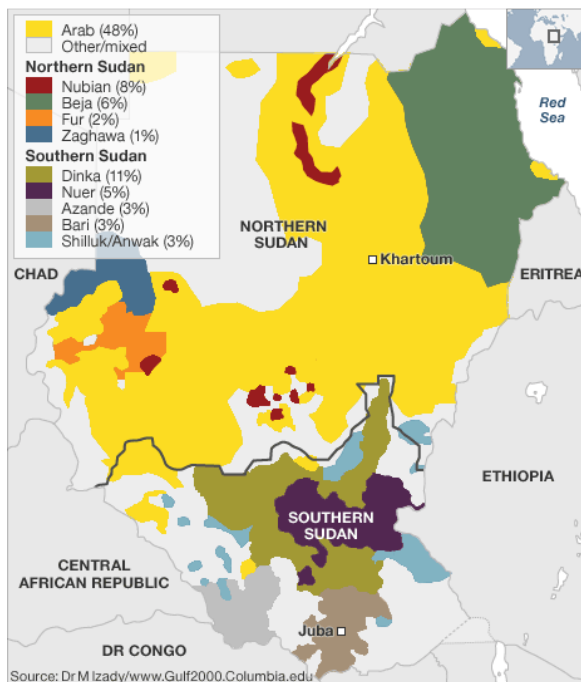
In this study the authors deal with the introduction of the basic political and Economic situation of Sudan and South Sudan. The study is the first part of a series of investigations on the two new countries, which will later deal with the issues of the division of resources and economic scenarios.

Materials and methods

This paper is based on secondary research. There is great emphasis on the history of Sudan and South Sudan, because in this country's case the past 2 hundred years had such determining power that can be felt even in the 21st century. Hungarian and international sources were used as well to provide a complex and reliable source about the situation of the two new countries.

The geography of Sudan

Sudan, after many years of civil war, split in two parts in 2011, Sudan and South Sudan, respectively. Although they were one, their differences manifested in many ways; for example, different ethnicities lived in the different parts (Figure 1 about ethnicities).



1. Figure. Ethnicities of the two Sudans

Source: <http://gulf2000.columbia.edu/maps.shtml>, n.d.

Also, they had economic and geographical inequalities, furthermore, as it will be highlighted in the current article many times, they had different amount and division of resources. To unveil the economic importance of the two investigated countries it is necessary to go through its history, geographical endowments and its surrounding region, the Nile River Basin.



2. Figure. Political map of the old Sudan

Source: The University of Texas at Austin, n.d.

The old Sudan was the largest country of Africa. It bordered the Red Sea between Egypt on the north and Eritrea and Ethiopia on the southeast; it borders Chad and the Central African Republic on the west. Its newest southern neighbor became South Sudan, separated with a bold red line on Figure 2.

The highest point was Mount Kenyatta, 3187 meters, located in the Immatong mountains, close to the Ugandan border. Its greatest width measured about 1,400 miles, and its length is 3,200 kilometres. In the area, north of latitude 19 north, dry northerly winds prevail and rainfall is rare. In winter strong, cold winds and sandstorms are frequent. There are occasional slight rainfalls in the Red Sea region. In northern Sudan there are two major deserts, the Nubian Desert on the east and the Libyan Desert on the West. Between latitude 19 north and 10 north the climate is influenced by the north-south movement of dry northerly winds and moist southerly winds which produce a wet summer and a dry winter. In the northern part of this region, which includes Khartoum at latitude 16 north, sandstorms (huboob's) are common from May until August. There is little binding vegetation here, but going further south, the vegetation gradually changes from desert to semi-desert to savannah with long grasses and large plains. South of latitude 10 north, the climate and vegetation is essentially that of the equatorial type. Rainfall occurs most of the year, and the weather is hot and humid. Khartoum's average maximum temperature is over 38 degrees °C and prevails from February to November, while an average maximum of 34 degrees °C characterizes the remaining two months. Khartoum is famous for its location on the "Mogran" the confluence of the White and Blue Niles. The Nile, the longest river in the world, stretches 10,6188 kilometres (U.S. Embassy of Sudan, n.d.).

There are several dams on the Blue and White Niles. Among them are the Sennar and Roseires on the Blue Nile, and Jebel Aulia Dam on the White Nile. There is also Lake Nubia on the Sudanese-Egyptian border. Rich mineral resources are available in Sudan including: petroleum, natural gas, gold, silver, chromite, asbestos, manganese, gypsum, mica, zinc, iron, lead, uranium, copper, kaolin, cobalt, granite, nickel and tin. Desertification is a serious problem in Sudan. There is also concern over soil erosion. Agricultural expansion, both public and private, has proceeded without conservation measures. The consequences have manifested themselves in the form of deforestation, soil desiccation, and the lowering of soil fertility and the water table (Sudan.net, n.d.).

The brief history of Sudan

The richness of Sudan's geographical endowments is matched by its history. Archaeological evidence has confirmed that the area in the east of Sudan, Nubia, was inhabited at least 70,000 years ago. A settled culture appeared around 8,000 B.C. They subsisted on hunting, fishing and grain foraging and kept cattle and sheep (Sudan.net, n.d.).

However, in the frame of this paper we cannot allow ourselves to present all the history of Sudan; instead, we intend to cover the general, but important points of the history of Sudan, which may help to understand the situation of the differences of the South and the North. We will concentrate on the events after the Modern Egyptian Occupation after 1821. Sudan was a collection of small, independent kingdoms and principalities from the beginning of the Christian era until 1820-21, when Egypt conquered and unified the northern portion of the country. However, neither the Egyptian nor the Mahdist state (1883-1898) had any effective control of the southern region outside of a few garrisons. Southern Sudan remained an area of fragmented tribes, subject to frequent attacks by slave raiders (Sudan.net, n.d.).

Later, like in many other countries in the history, religion help unifying the warring and scattered regions and ethnicities.

In 1881, a religious leader named Muhammad ibn Abdalla proclaimed himself the Mahdi, or the "expected one," and began a religious crusade to unify the tribes in western and central Sudan. His followers took on the name "Ansars" (the followers) which they continue to use today and are associated with the single largest political grouping, the Umma Party, led by a descendant of the Mahdi, Sadiq al Mahdi. Taking advantage of dissatisfaction resulting from Ottoman-Egyptian exploitation and maladministration, the Mahdi led a nationalist revolt culminating in the fall of Khartoum in 1885. The Mahdi died shortly thereafter, but his state survived until overwhelmed by an invading Anglo-Egyptian force under Lord Kitchener in 1898. While nominally administered jointly by Egypt and Britain, Britain exercised control, formulated policies, and supplied most of the top administrators. In February 1953, the United Kingdom and Egypt concluded an agreement providing for Sudanese self-government and self-determination. The transitional period toward independence began with the inauguration of the first parliament in 1954 (Sudan.net, n.d.).

Despite this great step for an independent and self-determining new country, the future of Sudan was very uncertain at this point to say the least, with ethnical and religious differences occurring among the people of Sudan.

With the consent of the British and Egyptian Governments, Sudan achieved independence on January 1, 1956, under a provisional constitution. The new constitution was silent on two crucial issues for southern leaders - the secular or Islamic character of the state and its federal or unitary structure. However, the Arab-led Khartoum government reneged on promises to southerners to create a federal system, which led to a mutiny by southern army officers that launched 17 years of civil war (1955-72). In 1958, General Ibrahim Abboud seized power and pursued a policy of Arabization and Islamization in the south that strengthened southern opposition (Sudan.net, n.d.).

The second Sudan civil war effectively began in January 1983 when southern soldiers mutinied rather than follow orders transferring them to the north (Sudan.net, n.d.).

The 1990s saw a succession of regional efforts to broker an end to the Sudanese civil war. Beginning in 1993, the leaders of Eritrea, Ethiopia, Uganda, and Kenya pursued a peace initiative for the Sudan under the auspices of the Intergovernmental Authority for Development (IGAD), but results were mixed. Despite that record, the IGAD initiative promulgated the 1994 Declaration of Principles (DOP). The Sudanese Government did not sign the DOP until 1997 after major battlefield losses to the Sudan People's Liberation Movement/Army (SPLM/A). That year, the Khartoum government signed a series of agreements with rebel factions under the banner of "Peace from Within." These included the Khartoum, Nuba Mountains, and Fashoda Agreements that ended military conflict between the government and significant rebel factions (Sudan.net, n.d.).

The Government of Sudan and the SPLM/A initialled the final elements of the comprehensive agreement on December 31, 2004. The two parties formally signed the Comprehensive Peace Agreement (CPA) on January 9, 2005 (Sudan.net, n.d.).

It could be observed that officially Sudan many years of relative peace during the actual wars and civil wars, however, in reality, the Sudanese people waged war for more than a hundred years before 2005. In a European country, for young people it is hard to imagine nowadays that war can be an influencing factor for economic growth. Six years later the country separated into two pieces, hoping to walk their own ways and to finally live in peace, while producing economic growth.

The separation of South and North

South Sudan received independence from Sudan, with its capital in Khartoum, in the 9th of July, 2011, with which it waged two bloody civil wars in the past half century. The

main reason behind the armed rebellion and the freedom wars was the forced identity export, islamisation and arabicisation of the northern regime (Illés, 2011).

South Sudan is a multiethnic country, with 64 distinct ethnic groups. The population is very young: under-21s account for 50 percent, and only 28 percent is above 30 years of age. Four-fifths of the population of the country (~12 million) live in rural areas. More than 70 percent above 15 are illiterate. With almost every 50th birth resulting in the mother's death.

Formed from the 10 southern-most states of Sudan, South Sudan is a land of expansive grassland, swamps and tropical rain forest straddling both banks of the White Nile. It is highly diverse ethnically and linguistically. Among the largest ethnic groups are the Dinka, Nuer and Shilluk. Unlike the predominantly Muslim population of Sudan, the South Sudanese follow traditional religions, while a minority are Christians (BBC.com, 2014/A).

Long based on subsistence agriculture, South Sudan's economy is now highly oil-dependent. While an estimated 75% of all the former Sudan's oil reserves are in South Sudan, the refineries and the pipeline to the Red Sea are in Sudan. Under the 2005 accord, South Sudan received 50% of the former united Sudan's oil proceeds, which provide the vast bulk of the country's budget. But that arrangement was set to expire with independence. In January 2012, the breakdown of talks on the sharing of oil revenues led South Sudan to halt oil production and halve public spending on all but salaries. A deal in March 2013 provided for Sudan to resume pumping South Sudanese oil in May, and created a demilitarised border zone (BBC.com, 2014/B).

The peace and separation in 2011 was a historical opportunity for the two new countries to solve their differences.



3. Figure. Sudan & South Sudan oil infrastructure, 2006
Source: U.S. Energy Information Administration, 2013

However, various outstanding secession issues - especially the question of shared oil revenues and the exact border demarcation - have continued to create tensions between the two successor states. Sudan has long been beset by conflict. Two rounds of north-south civil war cost the lives of 1.5 million people, and a continuing conflict in the western region of Darfur has driven two million people from their homes and killed more than 200,000 (BBC.com, 2014/B).

The north and the south both have important resources, to different extents however. After the separation, much of the oil reserves (75%) stayed in South Sudan. To give a clearer picture, Figure 3 presents the situation of oil reserves and refineries of the two countries.

On the other hand, the pipelines run towards the Red Sea, which means that South Sudan can only sell its oil via Sudanese help and agreement, since there is no sea-port in the southern country. Refineries are also in the northern part.

These two elements create tensions between the two countries and disagreement as well on how the two parts should share the profit from oil.

The Comprehensive Peace Agreement (CPA) in 2005 determined the share of assets. In the provisional time period the profit coming from the oil produced in the South should be received by the Southern government. Sudan started exporting oil in 1999 after, as a result of a significant Chinese investment, the first pipeline called "*Greater Nile Oil Pipeline*" and the infrastructure needed for that was constructed, which transports the oil from the northern region South-Kordofan and from the southern region Unity to Port Sudan. In 2006 the second, *Petrodar*, was finished, which connected the Adar Yale oil field of the southern Upper-Nile region to production. The current oil reserves of Sudan is as much as 6.3 billion barrels, and nowadays they produce approximately 500 000 barrels (Illés, 2011).

As a fuel for conflicts, before the CPA the southern areas did not receive profit from the oil. However, after the peace agreement, Juba, the capital of South Sudan gained a significant source of US dollars.

In 2010, half the revenue of Khartoum, and 97% of Juba's revenue came from the profit of oil (Illés, 2011).

The division of work with the oil looks like this: In Sudan, the Ministry of Finance and National Economy (MOFNE) regulates domestic refining and oil imports. The Sudanese Petroleum Corporation (SPC), an arm of the Ministry of Petroleum, is responsible for exploration, production, and distribution of crude oil and petroleum fuels in accordance with regulations set by the MOFNE. The SPC purchases crude oil at a subsidized cost from MOFNE and the China National Petroleum Corporation (CNPC). According to the IMF, SPC purchased light crude (Nile Blend) at a fixed price of \$49/bbl, instead of the international price of \$110/bbl for light crude, and \$82/bbl for heavy crude (Fula Blend) in 2011. After purchasing the crude, SPC then contracts with local refineries to process it. It sells the domestically refined and imported fuels to distribution and marketing companies at subsidized prices set by the MOFNE, according to the IMF. Locally refined products are sold at a price lower than production costs, and imported fuels are sold below the cost of importation. The IMF estimated that fuel subsidies accounted for 14 percent of total government expenditures in 2011 and 15 percent in 2012. Fuel prices in Sudan are lower compared to nearby countries. According to the IMF, the subsidy is exported to neighbouring countries as Sudan's subsidized fuel is often smuggled across its borders. South Sudan created the 2012 Petroleum Act, which outlines the institutional framework governing the hydrocarbon sector. The Act established the National Petroleum and Gas Corporation (NPGC). NPGC is the main policymaking and supervisory body in the upstream, midstream, and downstream segments of the hydrocarbon sector and is authorized to approve petroleum agreements on the government's behalf. The Ministry of Energy is responsible for the management of the petroleum sector. The Sudan National Petroleum Corporation (Sudapet) is the national oil company in Sudan, and the Nile Petroleum Corporation (Nilepet) is its counterpart in South Sudan. At the end of 2011, South Sudan nationalized Sudapet's assets in the South and transferred them to Nilepet, according to a Foreign Reports Bulletin. Both companies are active in their respective country's oil exploration and production and are often minority shareholders in joint ventures with foreign oil companies because of their limited technical expertise and financial resources (U.S. Energy Information Administration, 2013).

The separation brings up many questions. Among others, how will the two countries deal with their old differences? Will the separation bring peace for them? Can they have a peaceful agreement about their resources? And of course, how will the two countries keep up with its regional competitors/rivals in the River Nile Basin?

The role of Sudan and South Sudan in the River Nile Basin

River Nile is one of the longest rivers of the world, its length is 6,667 km, its catchment area is 3.37 million km² (somewhat bigger than the total territory of India). Nowadays Nile has a decisive or at least a very significant role in feeding and supplying 11 countries and their 300 million inhabitants with water. These countries are as follows: Egypt, Sudan (North and South – the latter became independent in July 2011), Ethiopia, the Democratic Republic of Congo, Kenya, Tanzania, Uganda, Rwanda, Burundi and Eritrea. The latter is not riparian country but the catchment area of the Nile extends to Eritrea as well (Neszmélyi, 2014/A).

On the basis of forecasts the population of the river basin of Nile will be doubled between 1995 and 2025. The prevision of the annual flooding periods of the river is cumbersome, the quantity of the surplus-water discharge varies from year to year, and it is also difficult to estimate in advance. From among the eleven countries from the aspect of the Nile the following countries have special importance: Egypt, North and South Sudan, Ethiopia and Uganda (these ones are most concerned by this issue) while in the water supply of the other Sub-Saharan countries the Nile plays a lesser decisive role (Neszmélyi, 2014/A).

Sudan and South Sudan are both affected by the conflict and dispute of distribution and utilization of water runoff of Nile River. The two countries depend highly on the water of the Nile. According to a past agreement between Egypt and the United Kingdom in 1929 Egypt can receive 48 billion m³ of water and Sudan can receive only 4 billion m³ from the Nile. In 1959 there was a new agreement, this time, between Sudan and Egypt that Egypt will receive 55.5 billion m³, while Sudan receives 18.5 m³ of water. This agreement was not signed by any other countries, so it was one of the basis of the disputes felt even nowadays (Neszmélyi 2014/A).

Oil exporters, or those states which are striving for establishing their economies on oil exports (like the two Sudanese states) should be aware and would even soon face two very timely problems which reflect to the fact that on longer run economic development cannot be based on just rising oil prices. On one hand it is the state of food production respectively the case of wheat and other cereals where the level of self sufficiency shows decreasing trends, and on the other hand, the fact that growth rate of population exceeds the growth rate of food production (Zsarnóczai, 1997).

These difficulties are typical in case of the majority of states in the Middle-East and in Sub-Sahara. A very important result that it is getting to be recognized by the riparian countries is the fact that utilization of the River Nile is not a so called zero sum game. There are and will be still enough reserves to be exploited and utilized jointly. Therefore instead of a win – lose situation, it can be converted to a win – win model. Relying on this point of view further programs have already been launched such ones which might be advantageous for the riparian states in the fields of water quality improvement, growing plant cultures of lesser water demand, wastewater utilization and the improvement of environmental conditions of catchment area (Neszmélyi, 2014/C).

The effects of conflicts on the economy

To predict the effects of the conflicts it is worth taking a look at the case of Egypt.

There, President Mubarak and his 3 decade-lasting dictatorial, but stable political and economic regime was swept away by a revolutionary movement started on 25th January 2011.

This affected promptly and negatively the economy including tourism sector and its implications can be felt even by now (Neszmélyi, 2014/B).

The two Sudanese countries should also be aware of the situation in other African countries, for example, of Nigeria.

The Nigerian leadership faces parallelly public anger arising from the urging economic reform measures and the increasing spread of extremist groups throughout the country. The comprehensive strike, - which has reached nationwide dimensions due to the abolishment of fuel price subsidies, - harms by several hundred million dollars the Nigerian national economy each day, as well it has a destabilizing impact on the public order. President Goodluck Jonathan attempted to reconcile the strike and the public anger, but without real success up to now (Neszmélyi, 2012).

Both parts of the former Sudan suffer from under-education, lack of proper infrastructure and social security, most likely due to the long years of violent environment, civil wars and uncertainty. It could be observed therefore, that stability is the basis of every economy. Of course, dictatorship is not desirable, since it usually brings order, but it is not the same as stability. Therefore, stability and social security are both needed. But what holds the next decades for Sudan and South Sudan?

At this point it is worth summarizing the drivers of the future scenarios. Such drivers can be historical events, geographical endowments, political decisions, etc. - factors which can influence future events, fuel the fires or provide opportunity for cooperation. In our opinion, the most important drivers are:

- Arabization, islamization in the north,
- huge ethnical and religious diversity in the south ,
- desire for independence in the south - solved in 2011, still have effects in 2014,
- a desire for independence in other regions of the northern part,
- lagging behind economy in both parts,
- a need for resources in both countries,
- even greater need for peace and prosperity,
- low level of education and infrastructure in both countries,
- huge oil reserves, mainly in the south,
- established pipelines and refineries, mainly in the north, with access to the Red Sea only in the north,
- the pipelines and other infrastructure was established by the help of foreign investments.

The religious and ethnic differences are not problems to be solved by themselves; however, to conflicts and disputes they cause are. Therefore, they need to be treated, and treated carefully by the politics in the region. In the authors' opinion it is an issue to be solved mainly by the people of the two countries, but probably they would need third party mediation to devise a strategy to deal with the differences. In any case, the differences must be treated carefully and by emphasizing consensus among the participating parties, groups.

The situation is even more difficult considering after the separation of the southern area other regions expressed their intention for independence, some with considerable oil reserves.

Conclusion

The two countries need peace and stability for many reasons. From the economic point of view, investors can easily get scared away if the situation is not sufficient for further investments. The lack of money after such an event could be disastrous for a country.

The two countries have to take steps very carefully about their ways of development, either they cooperate or not; if a country's production is too specified, and not diverse enough, it will be very sensitive to global changes, for example, in the case of oil prices.

For the economic problems the solutions cannot be purely economic in the case of Sudan and South Sudan. The greatest need is for peace and cooperation, because if not considering the long history of civil wars and disputes, the situation would be quite clear: South Sudan would produce much of the oil, and using Sudan's infrastructure the oil could get transported to the port, and from the profit both countries could develop better infrastructure, invest in new economic opportunities (such as other energy resources, in case of radical change in oil prices) and education, improving social security, urging cooperation with other countries along the Nile, etc.

The scenario above represents a highly ideal case, which has, of course, many obstacles, which cannot be solved in a short time; probably years, if not decades are needed to put the past behind and start cooperating with each other.

On the other hand, besides cooperating each other it is worth considering cooperating with other countries in the region, especially because there are other conflicts as well, such as the one mentioned regarding the water of the Nile.

Besides stability and cooperation, education should be emphasized as well, since it is one of the basic requirements for high level legitimate governance - if people are under-educated and do not have enough proper information about their situation globally, they will not want to change, since they will not see any ways for a change. Education gives new perspective to people for their ambitions, aside from providing them job opportunities in their future.

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