



# Turbulence Ahead

## The North African Maghreb in 2019

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Turbulence will increase across the North African Maghreb in the year ahead. Elections, public protest, and economic trends all create the potential for crises that will be difficult to solve. Policymaking on critical issues will likely remain stalled in every country, leaving a debilitating governance vacuum. That vacuum will further widen the gap between citizens and elites and fuel radicalization and irregular migration, two trends that will continue across the region this year. A divided Libya will continue undermining regional security, and the geopolitical contest for North Africa will intensify as external actors seek economic and strategic opportunities in the region. This commentary outlines key trends to watch in 2019 that point to uncertainty for the Maghreb in the year ahead.

### *Algeria's Elections*

Algeria is set to head to the polls in April. If elections are held as expected, President Abdelaziz Bouteflika will secure a fifth mandate. Doing so would signal that Algeria's powerbrokers—principally the presidency, military, and powerful business elites—have bought more time to work out who will be tapped to carry on Bouteflika's legacy. If elections are postponed, as some opposition figures are speculating, it will signal that Bouteflika's run is over, but no consensus has been reached on his successor. The bigger question is not who will eventually replace the president, but whether Algeria's powerful vested interests can unite

around a strategy to steer the country toward a more competitive market economic system while maintaining the social safety nets that have sustained stability over the last two decades.

### *Tunisia's Political Polarization*

Political conflict and polarization will intensify as Tunisia prepares for presidential and parliamentary elections later this year (currently scheduled for November). The consensus between Nidaa Tounes and Ennahda, which provided stability but little progress, has ended. Meanwhile, the conflict between Prime Minister Youssef Chahed and President Beji Caid Essebsi is intensifying. Chahed is seeking to implement economic reforms, but powerful interests looking to preserve vestiges of the old authoritarian order are undermining him. The formation of new political parties creates a more crowded and fragmented political arena. Simultaneously, public anger at the political class is increasing due to politicians' failure to address the country's economic crisis including inflation, the decline of the Tunisian dinar, and persistent unemployment.

### *Western Sahara Drama*

After years of U.S. ambivalence to the conflict, the Trump administration has set its sights on resolving the Western Sahara conflict or, if all else fails, defunding the UN peacekeeping operation in the territory. The U.S. administration persuaded parties to the conflict to meet

in December, but little progress was made. It is unclear whether the White House has a preferred outcome to resolve the conflict or if it simply wants to shutter a peacekeeping operation that has endured for more than two decades. What is certain is that without a clear strategy to resume credible talks, diplomatic tension between Morocco and Algeria is likely to escalate, potentially triggering actions by both governments that undermine their own interests and those of the region.

### *Libya's Stalemate Threatens to Unravel*

Libya will remain enmeshed in conflict despite the best efforts of the UN envoy to build a national dialogue. An escalating battle to control Tripoli as well as valuable oil production and export facilities would deepen Libya's many problems. As long as the main armed protagonists seek all-or-nothing solutions, political violence will continue to plague the country and entrenched divisions will reinforce the country's political and security vacuum. The vacuum does three things: it deepens Libya's economic crisis despite increasing oil revenue, it destabilizes Libya's neighbors, and it provides safe havens for jihadi-salafist cells to operate and rebuild. External actors remain divided over practical solutions to address Libya's challenges.

### *Protest and More Protest*

Organized labor in Tunisia, Morocco, and Algeria have started the year promising public sector strikes to demand higher wages and benefits. Regular citizens will take to the streets as well. Protestors want governments to be more visible and provide effective services, but they simultaneously criticize government overreach, big business, and a lack of transparency and accountability. Governments are caught between protestors, whose success fuels further demands, and international lenders, who press governments to cut subsidies, shrink public sector payrolls, and tighten fiscal policy. Meeting the lenders' demands would surely fuel more public anger. The lack of clear economic solutions ensures that organized protests and spontaneous outbursts will continue across the region.

### *Radicalization and Lurking Terrorism*

The murder of two Scandinavian tourists in Morocco in December 2018 and a suicide attack in downtown Tunis

in October highlight the ongoing threat of terrorism in the Maghreb. The attack in Morocco was the first since 2011, and the Tunis attack was the first since a suicide bomber killed 12 people in downtown Tunis in late 2015. Governments have made progress dismantling local terrorist cells. And while opportunities to join jihadi-salafist groups abroad have declined, radicalized individuals that are inspired by al Qaeda or the Islamic State group (ISG) can, without warning, launch random acts of violence in the name of jihadi-salafism. Low-scale insurgencies persist along the Algerian-Tunisian border, though these remain contained by security forces. In Libya, two years after the ISG was ousted from its stronghold in Sirte, the group is regenerating in other parts of the country and remains active. Terrorism is not the region's primary threat, but random attacks create a backdrop that governments can manipulate to justify greater law enforcement powers. More violence could also threaten tourism, particularly in Tunisia and Morocco, both of which rely on tourism revenues to fuel the economy.

### *Irregular Migration*

North Africa will continue to be a conduit for sub-Saharan African migration to Europe, straining local resources and dominating North African governments' diplomatic agendas with both European and African partners. Crossings from Libya to Italy declined in 2018 but increased on the route from Morocco to Spain. North Africans seeking to reach Europe are also using increasingly desperate measures to leave their homes in search of better opportunities. Irregular migration of North African citizens to Europe is a barometer of the region's socioeconomic and political environment. Higher flows of migrants indicate more challenging political and economic conditions in the Maghreb.

### *Great Power Competition*

China and Russia have identified North Africa as an important arena to advance their commercial and security interests. Russia is playing a more active diplomatic role in Libya and seeks to rebuild its economic and military ties to the country. Doing so could give Russia another military foothold in the Mediterranean. China is even more active, and it has identified ports across North Africa as a critical component of its Belt and Road Initiative. It is already

the most important economic partner in Algeria, and it has invested billions of dollars in port and infrastructure expansion projects in the country. China has also signaled its interest in investing in Tunisia's port of Bizerte, an important site for undersea cables, and seeks to increase its presence along Morocco's Mediterranean coast. Countries in the region need to modernize their economies and build infrastructure, areas where China is offering appealing incentives to partner and reaping valuable opportunities.

Despite these trends, there have been some positive developments in the region. First, freedom of expression is now ingrained in Tunisia, one of the few accomplishments of the revolution. Tunisia is not the success story that many claim, but its intense political debates signal political pluralism, which is a noteworthy accomplishment. Second, Morocco's infrastructure expansion has laid a foundation for future economic development. Its Tangier-Med port complex has become an important transshipment hub on the southern Mediterranean and an impressive regional auto manufacturing center. Third, public debates about corruption, accountability, transparency, and other government shortcomings across the region mean that citizens are increasingly holding their leaders accountable for their performance. Progress is slow, but the debate is still alive.

The challenge ahead for North African governments is to overcome political stalemate and narrow rivalries to address the strategic challenges that will shape their countries for decades to come. If regimes and elected officials can start that process and demonstrate that they are responsive to their citizens' needs, North Africa will be better equipped to ride out the turbulence in the year ahead. If they fail, the clash between citizens and regimes will intensify, and the reverberations will be felt far beyond the Maghreb's borders.

All of this matters for the United States because increasing turbulence and shifting dynamics in the Maghreb affect a wide range of U.S. interests including counterterrorism, energy, global trade, and Mediterranean security. And yet, the United States is out of position to both protect its interests and benefit from opportunities. China and Russia recognize the region's geostrategic importance. They are making investments today in infrastructure, technology, energy,

and manufacturing that are laying the foundation for strategic partnerships in the Maghreb that will give them a future geostrategic edge. Local governments want a more robust U.S. presence, but if the United States is unresponsive, they will look for alternatives. Getting U.S. industry and government to look beyond the turbulence in the Maghreb and see the opportunity is key. Failure to engage more strategically now will make the United States less relevant in a critical geopolitical arena that is rapidly changing.

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