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OIL, GOLD, AND GUNS: THE VIOLENT POLITICS OF SUDAN'S RESOURCE BOOMS

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ABSTRACT

Sudan lost three-quarters of its oil resources after South Sudan's separation in 2011. This paper explores the consequences of Sudan's experience with traumatic decarbonization and how this informs thinking on the durability of systems of monetized political governance: political marketplaces. First, the lasting power of Sudan's leftover oil shows that even in exceptional cases, where the loss of oil is so abrupt and deep, ruling regimes can cling onto power and maintain their position in the political marketplace. By exploiting the remaining oil resources and tapping into alternative resources, regimes can - at least temporarily - plug gaps in political budgets to maintain the patronage networks that ensure their political survival. Second, new resources, gold in Sudan's case, do not necessarily change existing political marketplaces. Sudan demonstrates that even with new political figures at the top, political marketplaces often hold the same attributes as former ones. What new resources do influence, however, is who rises and who falls within a political marketplace. Finally, the paper shows how the fluidity and diversity of regional and international relations and commerce also allow domestic actors to maintain political marketplaces. The end of oil corresponded with China's disengagement as Sudan's primary economic partner and the UAE and other regional states stepping in.

ABOUT

Carbon Compacts, Decarbonization, and Peace in Fragile States in Africa and the Middle East Project

The Carbon Compacts, Decarbonization, and Peace in Fragile States in Africa and the Middle East project was a 21-month research project led by the World Peace Foundation at Tufts University and funded by the United States Institute for Peace. Our goal within the project was to analyze how traumatic decarbonization—a rapid loss of oil rents—would affect peace processes and political settlements in fragile oil-producing states in Africa and the Middle East. Under this project, a series of cross-cutting analyses and case studies (Iraq, Nigeria, South Sudan, Sudan, and Venezuela/Ecuador) were produced and are available at The World Peace Foundation website (<https://sites.tufts.edu/wpf/carbon-compact-decarbonization-and-peace-in-fragile-states-in-africa-and-the-middle-east/>)

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INTRODUCTION

At the Ozone Café in Khartoum in 2006, young, affluent Sudanese enjoyed the bounties of an oil boom. Wearing designer jeans and sipping café lattés underneath the cool mist of outdoor air-conditioning, the conflict and poverty that afflicted Sudan's periphery, particularly to the west in Darfur, was hard to conceive from a Sudanese capital undergoing rapid development.¹ One of the fastest growing economies in Africa and the world at the time, Khartoum and its environs underwent an infrastructure binge of new roads, bridges, office towers, and supermarkets. All of it, courtesy of an oil boom.

Marked by both sharp increases in international oil prices and production in the early 2000s, oil reshaped Sudan's political economy. After coming to power through a June 1989 military coup, billions in petrodollars provided the means for the ruling National Congress Party of President Omar Hassan al-Bashir to cement and extend its political rule. The NCP, originally known as the National Islamic Front, continued to use violence to hold onto power. But unlike military and democratic governments before, it was able to exploit the oil boom to feed and enlarge patronage networks and, through improved economic conditions and new infrastructure and subsidies, subdue some of the grievances of middle and upper-class Sudanese living in Khartoum and its surroundings. Oil also gave the regime the resources to erect a stronger security apparatus to suppress and harshly crackdown on political opposition and civil dissent. Oil gave President Bashir more power to ward off protests from trade unions, professional associations, and civil society groups that had played a key role in challenging ruling governments in Sudan's past.

Oil also shaped political relations between Sudan's center and periphery. The petrodollar windfall grant President Bashir a sizeable political budget to buy out powerful belligerents in southern Sudan which had the potential to threaten the NCP's control and influence at the center. This first involved buying the allegiance of rebel groups near oil areas to gain control over the strategic resource. After decades of civil war, oil then played a role in the NCP signing of the Comprehensive Peace Agreement with the Sudan People's Liberation Army/Movement (SPLA/M) in 2005. Oil revenue was a critical part of the peace deal and for the new SPLM-led regional government in what is today South Sudan. Overall, petrodollars acted as a powerful tool for the NCP to cement its control in the center and achieve peace with the restive south. Because the NCP could harness oil to reshape Sudan's political marketplace, a system of monetized political governance, it stayed in power well beyond any of its predecessors.²

But Sudan's oil boom did not last forever. Khartoum's ambition of becoming the 'Dubai of Africa' went unfulfilled. When South Sudan separated in 2011, after a yes vote in its referendum the year prior, Sudan underwent "traumatic decarbonization"—a rapid, unplanned and large-scale reduction in oil revenue. The political bargain Bashir made with the south came to upset his ability to maintain his grip on patronage networks in Sudan. Losing three-quarters of its oil resources when the south spilt, Sudan's exports fell by two-thirds, it experienced a severe shortage in foreign exchange, and its fiscal revenues were cut in half.³ The government was forced to remove fuel and food subsidies – the death knell of regimes in decades past.

1 Gittleman, 2006.

2 de Waal, 2019.

3 IMF, 2017, p. 2.

Many of the young Sudanese who once relished in the oil boom now took to the streets in anti-government protest. From 2011 on, with economic conditions worsening, waves of demonstrations took place in the capital and across central towns and cities. Hundreds of civilians were killed at the hands of government security and paramilitary forces over the years. Yet the sustained pressure from the demonstrations, a splintering NCP, discontent in the military, and growing assertiveness from the political opposition, threatened President Bashir's control over Sudan's political marketplace. Just shy of three decades of rule, Bashir was toppled in a military coup in April 2019. He was no longer able to dole out petrodollars to maintain his extensive patronage network, paper over grievances from Sudanese living in Khartoum and its environs, and subdue political opposition from rallying against him. For the Sudanese president and the NCP, the remnants of its oil industry, a post-2011 gold boom, and revenues generated from mercantilism in regional wars, were imperfect substitutes for the political budget oil once offered.

It took nearly a decade, but after South Sudan's separation, life without oil redefined sources of power, and political elite positioning, but without fundamentally changing the broader workings of Sudan's political economy. In the summer of 2019, Sudan's Transitional Military Council and the civilian and rebel coalition, the Force of Freedom and Change alliance, established a transitional government. Sudan's changing political economy, with gold replacing oil as its main export, ushered in new figures to the upper echelon of political power. In particular, the political standing of Darfuri paramilitary leader, Mohamed Hamdan Dagalo, commonly known as Hemedti, rose dramatically. Commanding the Rapid Support Forces, Bashir first brought Hemedti into prominence in Khartoum to protect his weakening position from a splintering NCP and political rivals within military and security services. But in controlling much of Darfur's gold trade and winning patronage from Sudan's rich Gulf neighbors for providing mercenary support to the civil war in Yemen, after Bashir's fall, Hemedti became deputy chairman of the Sovereignty Council of Sudan's transitional government. He is now both cooperating and competing with Abdel Fattah al-Burhan, the chairman of the Sovereignty Council, and head of the Sudanese Armed Forces, to profit from key companies in Sudan's economy and expand his patronage network and political power. All the while, Prime Minister Abdalla Hamdok and the civilian government must navigate between Hemedti and Burhan, lacking the same levers of finance and violent coercion as the two strongmen, and attempt to revitalize Sudan's governing institutions.

This paper examines the power shift in Sudan brought on by the loss of oil to South Sudan and the growth of gold as the new economic basis for its political marketplace. It focuses on how control of the gold trade led to a shift in political power away from the crony capitalists of the oil sector under President Bashir and towards Hemedti and his Rapid Support Forces. The paper begins by examining how oil cemented President Bashir and the NCP's political rule as production grew in the late 1990s and into the 2000s. It then explores how after South Sudan's separation, Bashir attempted to rebuild the political budget once provided by oil revenues by relying on the remnants of the oil industry, dramatic growth in gold exports, and renting Sudan Armed Forces and Darfuri militias to fight for the Saudi Arabia-United Arab Emirates coalition in Yemen's civil war. Next, the paper shows that although the gold rush and other sources of revenue were insufficient in replenishing the political budget once provided by oil, the geographical dimensions of gold as a resource came to influence politics and conflict in different ways compared to oil. Dispersed through the country, including large deposits in Darfur, and easily extractable by artisanal miners, the political ecology of gold compared to oil gave new prominence and power to the once distant Darfuri warlord Hemedti at Sudan's political center. Finally, the paper shows how the shift in Sudan's main resource strongly contributed to a marked change in its foreign relations. Post-oil, the UAE and Saudi Arabia gradually replaced China as Sudan's primary foreign patrons.

The paper concludes by considering how Sudan's experience with the loss of oil informs broader debates on change in political marketplaces. It shows that even though Sudan's experienced an abrupt and deep loss of its oil resources after 2011, it was nonetheless possible for President Bashir and his supporters to harness the remaining production, along with new sources of revenue from gold, and the use of violent coercion, to hold onto political power for nearly a decade. The emergence of gold as Sudan's main export did not fundamentally change the workings of the political economy, but instead, elevated those elites, who gained control over its extraction and trade, within the existing political marketplace. Finally, the paper shows how President Bashir, and later Hemedti and Burhan, exploited Sudan's fluid and diverse regional and international relations, as well as its new gold trade, to leverage their power at home. Altogether, Sudan's political marketplace of elites mixing their control over state resources and key economic sectors with violent coercion largely remains intact despite the ouster of President Bashir.

Oil Boom: **Petrodollars sustain President Bashir's power**

When Bashir finally did fall from power in April 2019, it came just after a major anniversary in the history of Sudan's political economy: forty years since its first commercial oil discovery. In March 1979, the American oil major, Chevron, announced the first commercial discovery of oil at Abu Gabra in Sudan not far from the town of Muglad near the border of Kordofan and Darfur. It took two decades to come to fruition, but the development of the oil industry had a profound impact on Sudan's political economy.

The Abu Gabra discovery in 1979 was a minor one compared to discoveries to come in southern Sudan's Upper Nile province, but today it remains one of the rump state's last remaining oil areas. In the following years, Chevron made a string of discoveries along the present-day border between Sudan and South Sudan. These included the currently producing oilfields Heglig, Unity, Adar Yale, and Palogue. But large-scale oil development was disrupted by civil war with the Sudan People's Liberation Army in 1983 and significant production delayed until the late 1990s when an international oil consortium led by China's largest national oil company finished construction of an oil pipeline to Sudan's Red Sea coast.

Sudan's leaders before Bashir knew the significance of oil to the Sudanese economy and their political power and longevity. In 1979, President Jaafar Nimeiri travelled to one of Sudan's early oil discoveries and jumped over sacrificial bulls in a rally of over 10,000 people to celebrate. His regime faced escalating economic and political pressure and oil was a potential godsend: 'The regime is at danger if we don't get this done,' a presidential aide told an American oil executive at the time.⁴

Nimeiri sought to redraw Sudan's internal borders to gain control of southern oil and armed Misseriya nomads living in the border areas of Southern Kordofan to drive southern Sudanese from their home in oil areas. He also exploited infighting between different southern rebel groups, the SPLA and Anyanya II, in hopes that ethnic divisions between Nuer and Dinka, and power struggles between rebel leaders, would advance his cause in the war and help his regime capture oil resources. Nimeiri's tactics to establish control of key oil areas as companies developed still untapped oilfields had far-reaching consequences for violence in Sudan in the coming years. They both fostered political cleavages between northern and southern Sudan around border

4 Patey, 2014.

disputes and fomented conflict between Nuer and Dinka armed groups that would re-emerge for decades to come.

But oil production did not arrive in time. Nimeiri was pushed to cut fuel and sugar subsidies and this released a wave of protest that toppled his regime in a military coup in 1985. The importance of getting the oil industry on its feet did not go away. When Sadiq al-Mahdi was elected prime minister of a coalition government a year later, oil was on his mind as well. Despite the civil war, he demanded and pressured Chevron to restart its operations and continued to arm and support Misseriya militias in oil regions. Yet Sudan's economy continued to struggle and was in desperate need of a boost.

The National Islamic Front also aggressively pursued oil development when it came into power in 1989. Under the leadership of sheikh Hassan al-Turabi, but with President Bashir as its front figure, the NIF ousted al-Mahdi in a military coup and held onto power through organizing Islamic finance to wrestle control over Sudan's private sector and exploited violent suppression of their political enemies. Foreshadowing Bashir's later support to Hemedti, the NIF was more successfully in dividing southern rebels than Nimeiri had been by signing the Khartoum Peace Agreement with southern rebel leader Riak Machar in 1997 and other southern rebel militias that occupied key oil areas.⁵ The deal encouraged international oil companies to expand operations in the late 1990s. Turabi and Bashir would spilt in 1999. The struggle, from which Bashir emerged on top, resulted in the NIF's name change into the National Congress Party, but Bashir and his supporters ultimately realized Sudan's oil prize.

Oil production started slowly in the 1990s, but Sudan crossed the average mark of 200,000 barrels per day in 2001. Oil output continued to climb in the final years of the civil war with southern Sudan, surpassing 300,000 bpd in 2004. Three years later, Sudan became sub-Saharan Africa's third largest producer after Nigeria and Angola. Africa and the world was in the midst an unprecedented oil boom thanks particularly to growing demand from China and across Asia.

There is perhaps no other country that timed its entry into the oil scene better than Sudan. It experienced a double boom. First, Sudan's production continued to grow, rising from 305,000 bpd in 2005 to 480,000 bpd by 2008. Second, international oil prices, which registered an annual average of around \$20/barrel throughout much of the 1990s and early 2000s, climbed to an average of \$96/barrel during the so-called boom decade between 2004 and 2014.⁶ All this took place around the signing of the CPA, which provided stability, and thus increased investor confidence for the oil industry's continual growth. As a result, the Sudanese government experienced a massive influx of revenue from oil export sales. On average, between 2005 and 2010, oil revenues amounted to over \$5.7 billion, representing nearly 60 per cent of the government budget, a key engine of foreign exchange generation, and the lion's share of its exports.⁷

The oil boom produced tangible economic results for Sudanese living in Khartoum and its surroundings. The World Bank praised Sudan's massive expansion of physical and social infrastructure. This included expanding its road network from 3,358 kilometers in 2000 to 6,211 kilometers by 2008, a more than doubling of its electricity in the same period, and increasing the number of children enrolled in primary schools from 3.3 million to 5.3 million. Oil alone was not seen as the

5 Patey, 2014.

6 Opong, Patey & Soares de Oliveira, 2020.

7 Patey, 2014.

cause of the boom. The Bank argued that macro-economic stabilization reforms set into motion by the NCP throughout the 1990s, and a 2005 peace deal signed with the Sudan People's Liberation Army all helped pave the way for rapid growth.⁸ It was not naïve about the inherent challenges of overcoming widespread economic destitution throughout much of the country, and war and instability in Darfur. Still, it argued that Sudan was making progress, a view made from the vantage point of Khartoum's swank cafes and gleaming office and shopping complexes.

Ultimately, however, the NCP had little interest in diversifying Sudan's oil-centered economy to improve the welfare of Sudanese. Instead Bashir and his supporters exploited billions in petrodollars to prolong their political power and enlarge their personal affluence. In its peak oil production years (such as between 2005 and 2007), an average of 71 per cent of the Sudanese government's annual expenditure went to defence, police, and security services, mainly to cover salaries, providing little room for poverty alleviation or economic diversification efforts. With little interest in harnessing oil for the good of Sudan's fledgling economy, during a period of record growth, Sudan continue to accumulate massive debt, reaching over \$41 billion by 2011, the year of South Sudan's separation.⁹ All the while, high-level NCP officials reportedly funnelled billions in government funds abroad in banks to the UAE, UK, and Malaysia.¹⁰

A vast number of companies controlled by the NCP, the Sudan Armed Forces, and the security services were harnessed to profit from their official positions. This took place through corruptly awarding government contracts, the sale of land to commercial groups, and the control of the import and export of main commodities.¹¹ This activity had a broader stifling effect on the growth and strength of the Sudanese private sector, but enlarged the power and wealth of the NCP and its business associates.

The close ties between business and politics in Sudan reached the highest levels of government. After his downfall and arrest, reports indicated that some \$4 billion in assets was confiscated from President Bashir and his associates.¹² Bashir's brothers, Ali Hassan Ahmed al-Bashir and Abdella Hassan Ahmed al-Bashir, stood behind the Hi-Tech Group which held over 20 companies active in construction, cement, petroleum, telecommunications, and banking. The company was known in oil circles for charging inflated sums for setting up camps for oil companies and other construction work, but nonetheless was apt at winning contracts thanks to its political connections.¹³

Hi-Tech Group was also among NCP, military, and security service affiliated companies involved in Sudan's other multi-billion sector in the development of hydropower dams on the Nile in the country's north. These included the Dan Fodio conglomerate, Heglig Ltd, Al Qasr, Ingaz, and others.¹⁴ President Bashir headed the country's dams committee, responsible for steering through the project forward, and his brother, Abbas Hassan al-Bashir, controlled much of the cement market in Sudan through his extensive corporate holdings. Multinational companies from Europe, Asia, and the Gulf were essential in developing the large infrastructure projects,¹⁵ and loans from Chinese policy banks were instrumental in providing the necessary finance. Chinese loans typ-

8 World Bank, 2009. p. 2.

9 Patey, 2014.

10 Gallopin, 2020a; Apiku, 2007.

11 ICG, 2011. p. 18; Kukutschka, 2017; Hamoda, 2017; Baldo, 2018;; Ardigo, 2020.

12 Al Arabiya, 2020.

13 Patey, 2014.

14 Verhoeven, 2015. p. 211.

15 Sathish, 2008.

ically have economic conditions which stipulate the contracting of Chinese companies and use of Chinese exports. But by reaping the rewards of their close government ties, Hi-Tech and other companies could still get involved as partners and suppliers in some of these ventures and other Chinese investments.

Running on Empty: **Even a little oil can make a difference**

South Sudan's separation in 2011 brought a dramatic end to the centrality of oil industry in Sudan's political economy. The oil bust began with the immediate and colossal loss of 75% of its production to the new state. Shortly after, this was aggravated by a brief border war during which South Sudanese forces captured one of Sudan's largest and last remaining oilfields, Heglig, before withdrawing in the face of international pressure. However, the damage done to the oil installations by the fighting, and reportedly, deliberate sabotage, lowered Sudan's already hampered oil production. In lieu of an agreement on pipeline transit fees, Khartoum had brazenly confiscated several shipments along the only outlet for South Sudanese production across pipelines in crossing the length of Sudan to the Red Sea and international markets. This influenced South Sudan's decision to shut down its oil production in early 2012. Juba hoped that this would have a detrimental impact on Sudan's economy and lead to President Bashir and the NCP's fall from power. But after a fifteen-month period, when a pipeline agreement was finally struck and oil flowed again, it was South Sudan that took the brunt of the economic hit.¹⁶

Although a pipeline deal was completed, the outbreak of South Sudan's civil war, and its present day financial struggles, have limited the revenues Sudan received in pipeline transit fees and a transitional financial arrangement with Juba.¹⁷ In the arrangement, in order to fill the massive financial gap from losing oil, one-third was to come from financial transfers to Sudan from South Sudan, one-third from austerity measures taken by Khartoum, and the final third from debt relief from the international community. Bashir and the NCP also expected the United States would fulfill its promise and remove economic sanctions and delist Sudan from its State Sponsors of Terror. But the commitments from the international community on debt and Washington to end Sudan's economic isolation went unfulfilled in the aftermath of South Sudan's separation. Although Sudan's political leaders went ahead with the CPA and saw through South Sudan's independence as promised, ongoing hostilities in Darfur and Khartoum's meddling in South Sudan's civil war did little to win international favor.

But after the loss of much of Sudan's oil revenues, it still took time for Bashir and the NCP to lose their grip on power. In the immediate years following South Sudan's separation, the little remaining oil production did much to keep the high costs of importing petroleum fuels at bay. The remnants of Sudan's oil industry still made an impact on its political economy. The demise of Sudan's oil industry did not occur immediately after South Sudan's separation, but its precipitous decline increasingly undermined the economic foundation of Bashir's political power, and will continue to challenge the current transitional government in the years ahead. Sudan's oil production between 2012 and 2019 averaged an annual production of 106,000 bpd.¹⁸ The government split this output with oil companies, and much of Sudan's share was transferred to its Khartoum refinery for

16 de Waal, 2014. pp. 363-364.

17 Qekeleshe, 2020.

18 BP, 2020.

domestic fuel consumption needs. On the one hand, since international oil prices averaged over \$100 a barrel between 2011 and 2014, an historic high, Sudan lost considerable export revenues after South Sudan's separation. On the other hand, thanks to remaining production, Sudan was still exporting limited production and avoiding the import of expensive petroleum fuels which saved its budget from even further harm.

For a five-year period after South Sudan's independence, Sudan was able to domestically produce many of its fuel needs. Beginning in 2016, however, the Khartoum refinery and others in Sudan could no longer source enough crude oil to operate efficiently and it was necessary to import greater volumes of petroleum products. Consumption levels surpassed production that year and the next by some 35,000 bpd, by far the largest deficit in levels since South Sudan's split.¹⁹ Years of poor management and a lack of maintenance of the main refinery, and alleged corruption in the government's operation of the facility, led to its temporary shutdown in early 2018, exacerbating Sudan's fuel crisis.²⁰

At the same time, Sudan's oil production continued to decline as its consumption grew. Some small oilfields came onstream after 2011, but levels in 2020 reportedly fell to between 50,000 and 70,000 bpd.²¹ Investments in enhanced recovery in its oilfields could likely stabilize and prolong production levels, but in recent years the major Asian national oil companies active in Sudan have begun divesting their interests rather than investing the hundreds of millions of dollars needed to recuperate a single ageing oilfield. Despite new bidding rounds for exploration, few capable, new oil companies have entered the sector.²² This is partly fuelled by a lack of investor confidence. Sudan failed to compensate oil companies for the production it began taking from their corporate share. The China National Petroleum Corporation, for example, sold much of its stake in the Khartoum refinery, but the Sudanese government failed to provide repayment.

As a result of rising consumption, poor refinery management, and steadily declining production, Sudan was forced to begin importing higher levels of gasoline, diesel, and LPG. This resulted in the cost of fuel subsidies for the government to increase dramatically, making up 10.6% of Sudan's GDP in 2019 according to IMF estimates.²³ The government's eventual move to stem the financial bleeding by raising fuel prices alongside other basic goods fed the widespread public protests that were instrumentally in Bashir losing power. Oil's decline led to shifts in the elite power balance in Khartoum that were partly the result of Bashir's drive to find new sources of political finance.

Gold rush:

A new resource empowers new political actors

Decarbonization did not come as a surprise for Sudan. Already in 2005, President Bashir and the NCP signed away half Sudan's oil revenues to southern Sudan through the Comprehensive Peace Agreement and many expected South Sudan's separation in 2011. Neither did Bashir depend solely on Sudan's remaining oil to sustain his political power. Bashir and the NCP sought to rebuild their political budget by exploiting Sudan's abundant gold resources and leverage other exports. The

¹⁹ EIA, 2019.

²⁰ National Audit Chamber, 2019; Dabanga, 2017; Xinhua News, 2018.

²¹ Sudan Tribune, 2020.

²² Reed, 2019.

²³ IMF, 2020, p. 34.

president established and armed the Rapid Support Forces, a Darfur paramilitary group under the leadership of Mohamed Hamdan Dagalo, Hemedti, to wrestle control over gold mines in Sudan's western region and ensure his political power as the NCP splintered and wider discontent grew. The Sudanese government also strived to bolster other exports, mainly in agriculture, to generate foreign exchange and fill government coffers as a substitute for its lack of petrodollars. By providing thousands of Sudanese soldiers, drawn from Sudan Armed Forces and the RSF to fight in Yemen, Bashir also generated regional support and new avenues of accumulation in his political budget from Saudi Arabia and the United Arab Emirates.

Anticipating the need for new revenue sources, the Sudanese government promoted the development of the mining sector in its strategic plan for 2005 to 2011.²⁴ It did, however, not follow its own plan, which called for industrialization of the sector. Instead the government continued to tolerate artisanal miners, which accounted for 85-90% of gold production, and sought to corral gold production away from smuggling and towards the Central Bank of Sudan and, after its construction in 2012, the country's gold refinery. The government wanted to phase out artisanal mining in the long run, and encourage large scale industrial mining, but in the short and mid-term it prioritized maintaining gold production, and increased the number of licenses granted in order to generate foreign exchange and support jobs produced by the sector.²⁵

The initiative produced results. Sudan's gold production rose dramatically from 6,049 kilograms in 2007 to 93,400 kg in 2016.²⁶ Production levels are estimated and predicted to be 100,000 kg per annum between 2017 and 2021.²⁷ This growth has made Sudan Africa's third largest gold producer, a standing it once held in oil too. Sudan generated 13% of Africa's production in 2015, behind only South Africa (23%) and Ghana (20%).²⁸ There is no publicly-available breakdown of where gold quantities originate from in Sudan. Artisanal gold mining is found across Sudan's periphery in Northern, River Nile, Red Sea, Blue Nile, South Kordofan, South Darfur, and North Darfur at Jebel Amir and Jebel Marra. On the face of it, this makes it difficult for political elites in Sudan to capture and control gold mines. But because Jebel Amir is estimated to produce 17% of Sudan's total gold after rapid development by artisanal miners since 2012, Darfuri rebel groups, particularly Hemedti and the RSF gained significantly from the growth of gold.²⁹

Similar to Sudan's experience with oil, growth in gold production was incentivized by a dramatic rise in international prices.³⁰ Gold prices tripled from \$600 per troy ounce in 2005 to over \$1800 per troy ounce in 2014, and after remained in a band of \$1000 - \$1600 between 2015 and 2019. Prices reached new highs of \$2000 per troy ounce in 2020; gold was a 'safe-haven asset' during the covid-19 economic downturn.³¹ As a result of this steady increase in production and price, the value of Sudan's gold exports surpassed oil for the first time in 2015 and by 2017 gold represented 37% of Sudan's total exports.³² The end of the pandemic is set to lower prices in 2021 and 2022, but the rise of gold still represents a major boon for an oil-deprived Sudan.

24 Chevrillon-Guibert, 2016, pp. 4-5

25 Chevrillon-Guibert, 2016, pp. 4-5

26 Yager, 2012, p. 38.3; USGS, 2020.

27 Yager et al., 2019, p. 114.

28 Yager et al., 2019, p. 1.2.

29 Elhashmi, n.d. p. 52.

30 Stewart, 2009.

31 EIU, 2020; Sanderson, 2020.

32 CBOS, 2017, p. 230.

Impressive as Sudan's gold rush was, however, it did not replace the role oil once played in Sudan's political economy. Bashir and the NCP were unsuccessful in filling the deep financial hole left behind by Sudan's loss of oil. At the beginning of the decade, before South Sudan's spilt, petroleum exports generated over \$9 billion, whereas gold earned for \$1.5 billion in exports in 2017, the last reported year by the Central Bank of Sudan.³³ 2012 still represents the highest recorded year for Sudan's gold exports at \$2 billion. Large gold revenues, however, have been lost due to smuggling. In 2014, Sudan's minister of mining admitted that a substantial portion of Sudan's gold was looted abroad.³⁴ There has been a large gap between production and export figures over the years, which reached as high as 75% in 2015.³⁵ Yet even if smuggling subsidies, the growth of gold exports did not make-up for the loss of oil in Sudan's political economy.

But gold still had a profound impact on Sudan's political economy, and partly explains the rise of Hemedti to the upper echelon of political power in Khartoum. Differences in the political ecology of oil and gold, the extraction process of both resources, and their commodity chains into regional and international markets influence how different resources shape conflict and politics.³⁶ Oil, for example, localized in particular regions of a country, requires high-levels capital-intensive investment to extract and monetize. Unlike other African oil producers, such as Angola with large offshore oil resources tightly controlled by the central government, the political geography of Sudan's onshore oilfields fed secessionist ambitions in the south.

Conversely, minerals located far from the capital, and out of control from the central government, typically fuel local warlordism and at times rebellion. In Sudan, gold is diffused throughout various regions, largely extracted by artisanal miners, does not require high levels of investment to exploit, and can easily be smuggled out of the country in high volumes through various porous borders. Sudan's onshore oil has also been threatened during fighting in its various civil wars. Onshore oil can even be looted by armed groups, as seen in the Niger Delta. But gold and other minerals have a higher accessibility, because their exploration requires fewer financial, technological, and labor capabilities. Political marketplaces can also be designed around minerals through the value generated by armed groups through roadblocks and other obstruction, for example in the Democratic Republic of Congo and Central Africa.³⁷

The geographical and geological qualities of gold allowed Darfuri-based armed groups to gain new political power at the center in Khartoum. The political ecology of gold as a dispersed and accessible resource for low-skilled miners, elevates the significance of sub-national politics and security dynamics at the national level. After wresting control of Darfuri gold mines from competitors, notably the Darfuri militia leader Musa Hilal, once a Bashir ally, Hemedti and the Rapid Support Forces became a prominent player in Sudan's political economy. Initially, President Bashir elevated Hemedti and the RSF to bolster his position against rivals within the military and security services, but the Darfuri warlord turned on his patron alongside the Sudanese military in 2019. With control over much of the flow of gold and partaking in transnational mercenary ventures in the region, Hemedti became deputy chairman of the ruling Sovereignty Council in the transitional government.

33 CBOS, 2010, p. 172; CBOS, 2017, p. 230.

34 Sudan Tribune, 2014.

35 USGS 2020; CBOS, 2017, p. 232.

36 le Billon, 2012, pp. 179-189.

37 Schouten, 2021.

New players, Old game: The political marketplace stays the same

Although gold provided the new economic basis in Sudan, and Hemedti represented a new political figure, the dynamics of Sudan's political marketplace are familiar. Like Bashir, the NCP, and Sudan's military and security services, Hemedti is establishing a network of companies to exploit his political position to profit from Sudan's main industrial sectors. Hemedti and the RSF largely focused on controlling the gold trade from Darfur and elsewhere in Sudan at first, but since Bashir's downfall, the group is taking over companies across a broader set of industries that were once run by the National Intelligence Security Services.

Like Bashir before him, Hemedti also relies on family connections to ensure loyalty and continuity in his business empire. His brother, Abdelrahim Daglo, heads the holding company, Al-Juneid, that is a main player in Sudan's gold industry. Al-Juneid is estimated to have an annual turnover of some \$400 million. President Bashir had previously given Al-Juneid control over selling Sudan's gold, which it sold both to the Central Bank of Sudan but also directly abroad.³⁸ At one point, Al-Juneid reportedly produced a third of Sudan's gold.³⁹ Under Bashir, the Central Bank was made the sole buyer and exporter of gold in Sudan, paid for at a premium to discourage smuggling. This created macroeconomic instability for the country, but presumably also allowed for off-the-books deals to be struck as official export records were well below production levels.⁴⁰

Hemedti is not alone in the post-Bashir power and money grab. The chairman of the Sovereignty Council, and head of the Sudanese Armed Forces, Abdel Fattah al-Burhan, is also busy expanding his network of companies, and moving to control major markets, such as fuel and wheat imports, that were once dominated by Bashir and his supporters. Through the Military Industry Corporation, a holding company of the SAF, Burhan maintains hundreds of companies. This includes SIN, which sits on some 60% of Sudan's wheat market as well as the Martyrs' Organization, once controlled by the NCP, that is active in gold and entertainment.⁴¹

Hemedti and Burhan, comrades in military forays in Yemen, collaborators in the transitional government, are ultimately competitors in Sudan's political marketplace. Their rivalry over Sudan's political economy will shape the country's future prospects for peace and development in the coming years. The SAF and RSF are separately moving to gain control of gold mines in different parts of the country, often meeting protest and pushback from local, artisanal mining communities. They are also establishing competing companies in the livestock industry.⁴² In late 2020, Prime Minister Abdalla Hamdok voiced concern over the military's long reach in agriculture, mining and energy sectors and the lack of transparency and accountability in which these businesses are managed.⁴³ He claimed that under 20% of the state's resources are in the hands of the government and has called to reform these businesses into public joint stock companies.⁴⁴ But without control over a network of political violence, or violent capabilities under his command, Hamdok's position relative to the two strongmen is precarious.

38 Abdelaziz, Georgy & El Dahan, 2019.

39 Alamin, 2020a.

40 Elbadawi & Suliman, 2018; de Waal, 2019. p. 15.

41 Gallopin, 2020a. p. 21.

42 RVI, 2019; Gallopin, 2020a.

43 Abdelaziz, Eitahir & Lewis, 2020.

44 Al Jazeera, 2020a.

Burhan is resisting such pressures. He has made tentative moves to set up separate governing bodies superseding some of responsibilities of the transitional government.⁴⁵ Hemedti seems to seek to elevate his influence within the existing structure of the transition government. He claims to have deposited \$1 billion in the Central Bank of Sudan to help the country's financial woes.⁴⁶ Al-Juneid, the mining company run by his brother, has ostentatiously handed over control of its mining concession at Jebel Amer to the Sudanese government as well. Hemedti and the RSF are also expanding into agricultural and real estate ventures.⁴⁷ Ultimately, both Burhan and Hemedti are making political moves to keep the civilian government dependent on their business empires in an effort to leverage their standing in Sudan's political economy.⁴⁸

Looking forward, Burhan and Hemedti are clearly at Sudan's political center, but other prominent political and military figures may emerge to shape political and security dynamics in the future. Closely linked to war crimes in Darfur during the Bashir era, after the president's ouster, General Ibu Auf quickly resigned as head of Sudan's military council, along with his deputy Kamal Abdul-Marouf Al-Mahi, in the face of protest.⁴⁹ This opened up political space for Burhan and Hemedti to rise, and the two men are now busy consolidating their national positions, but future changes should not be discounted in the face of Sudan's fluid politics and shifting regional and international position.

Changing foreign relations : China, the Gulf, and the United States

Engagement with Sudan's international partners has also experienced considerable change as gold came to replace oil as its main export. China played an outsized role in Sudan's oil industry during the close to three decades of the Bashir presidency. As Sudan's oil production ramped up in the early 2000s its economic ties with China, Malaysia, India, and other Asian states offset a lack of access to the US and western markets due to American sanctions. Underpinned by its role as the main buyer of Sudanese crude oil, China became Sudan's main trading partner, but also a prominent investor, provider of finance, and significant political partner to shield Khartoum for harsher international sanctions sought by the US and its allies.⁵⁰

Yet support for President Bashir from Beijing diminished after South Sudan's separation took three-quarters of Sudan's oil. In his final months in power, Bashir suffered a similar fate in his relationship with his primary foreign patron as one of his predecessors. In April 1985, President Nimeiri's went to Washington, Sudan's closest foreign partner at the time, in hopes of securing financial assistance to stave off economic meltdown in Sudan and ensure his lasting political power. But his plea was largely rebuffed by US officials.⁵¹ He was ousted from power in a military coup before he could return to Sudan. In September 2018, President Bashir met with Chinese President Xi Jinping at the tri-annual Forum on China-Africa Cooperation in Beijing.⁵² Similar to Nimeiri, he received little financial backing to save his crumbling presidency. In April 2019, Bashir was

45 Al Jazeera, 2020b.

46 Krauss & Magdy, 2019.

47 Gallopin, 2020a, p. 21

48 Gallopin, 2020a.

49 MEE, 2019.

50 Large & Patey, 2011.

51 Patey, 2014, p. 47.

52 Dabanga, 2018.

also removed from power in a military coup. In their respective moments of need, both presidents found that their main foreign patrons unwilling to offer assistance to fill their political budgets and save their presidencies.

After decades of close political ties with China, Bashir's political star had clearly fallen in Beijing. With economic ties deteriorating behind-the-scenes post-2011, Beijing refrained from becoming involved in Sudan's political turmoil and elected to take a 'wait-and-see approach'.⁵³ Unlike its diplomatic role in conflicts in Darfur and South Sudan, China was largely quiet and inactive during the political upheaval of Sudan's protests. As Beijing's once prominent interlocutors in the NCP, such as former oil minister Awad al-Jaz, were arrested following Bashir's downfall, Chinese officials quickly met with Burhan and Hemedti to confirm formal ties.

In 2018, China did write-off \$160 million in Sudan's debt and offered smaller grants, but the Bashir government had disappointed its Asian partners by not providing the China National Petroleum Corporation and other Asian national oil companies their stakes of lifted oil from remaining oil-fields. For CNPC, this resulted in the accumulation of \$2.5 billion in losses from Blocks 2A and 4 where the Heglig oilfield is located in South Kordofan. Sudan later indicated it would not renew the Chinese oil company's rights to operate the Abu Gabra oilfield and Block 6 in West Kordofan state. Sudan could no longer manage its mounting debt and was reportedly using 95% of its oil revenues to repay existing loans.⁵⁴ Sudan had typically paid back Chinese loans with its oil revenues, but post-2011, on top of the losses experienced by oil companies, according to the Central Bank of Sudan, Sudan still owes roughly \$2.2 billion to China.⁵⁵ After decades of providing investment and finance to Sudan, Beijing began to steadily disengage during Bashir's last years in power.

China's new, muted approach is clearly indicated by the fall in its financial support to Sudan post-2011. From 2011 to 2018, China granted Sudan an estimated \$143 million in loans, a mere 2.5% of the \$5.8 billion provided, largely for power and transport projects connected to its dams development program, between 2003 and 2010.⁵⁶ It did appear that Khartoum made several efforts to attract new finance from China that could bolster its political budget. In 2013, Sudan's then finance minister, Ali Mahmoud Abdel-Rasool, announced that Sudan received a \$1.5 billion loan from China, which according to Sudanese media was provided by the China Development Bank to help Sudan's public finance woes.⁵⁷ But there was no confirmation from the Chinese side of the assistance. This was much like South Sudan's claims that China planned to provide \$8 billion in development loans in 2012.⁵⁸ Both loans may have been preemptively announced by the governments in hopes of tying Beijing's hands.

In 2014, the China EXIM bank reportedly offered Sudan a \$700 million loan to build a new airport in Khartoum.⁵⁹ Yet construction by the China Harbour and Engineering Company did not commence. Beijing put a hold on the loan's disbursement over Sudan's failure to repay other Chinese

53 Barber, 2020.

54 Nyabiage, 2020.

55 Leo, 2010.

56 This is based on figures tallied by the China-Africa Research Initiative, a leading tracker of Chinese loan data in Africa. In correspondence with the author it was determined that a \$700 million loan offered by China to Sudan in 2014 was not disbursed.

57 Reuters, 2013a.

58 Ferrie, 2012.

59 Reuters, 2013b.

loans.⁶⁰ After 2011, Sudan had initially repaid Chinese loans with pipelines fees generated from South Sudan, but after South Sudan's civil war these revenues dried up. Beijing offered Sudan a five-year moratorium on repayments,⁶¹ but was not open to granting new, large loans. The opportunities to bolster Bashir's political budget, as he did through loans for the dams development project, dried up over time.

In 2018, Sudan announced that Turkey and the Turkish company, Summa, would take over the Khartoum airport project.⁶² This may have been a result of Bashir's outreach to Turkey and Qatar for financial assistance at the time against their rivals the UAE and Saudi Arabia. After Bahir's downfall, however, the Khartoum International Airport Company was dissolved by the transitional government on corruption allegations due to its connection with the ousted president.⁶³ China's ambassador to Sudan announced to the transitional government that his country would be willing to restart the project.⁶⁴ Such finance could see companies affiliated with Hemedti or Burhan become involved and profit from the large venture.

At the same time, there were political changes in China post-2011 that may have de-prioritized Sudan for Beijing. Xi Jinping became Chairman of the Chinese Communist Party in 2012 and China's President the year after. In a far-reaching anti-corruption campaign, partly executed to undermine his political opposition in the Party, present and former high-level Chinese leaders were arrested. This included Zhou Yongkang, a former CNPC chairman who rose to the heights of China's political system. Zhou had also been China's point man in Sudan. When visiting Khartoum in 2009, he said he was 'an old friend of the Sudanese president' and praised his leadership in developing Sudan and its oil sector.⁶⁵ Zhou's fall from political power in China made it more difficult for Bashir to win support from Beijing post-2011 to rebuild his political budget after oil. This demonstrates how political and personal links with leaders overseas can impact political marketplaces.

Under Sudan's transitional government, China's Belt and Road Initiative, an expansive plan to develop new trade, infrastructure, technology, and political links from Asia to Europe, may yet see new Chinese finance offered to Sudan. One ambitious project is to link Sudan by rail from the Red Sea, across Darfur, to Chad and Cameroon on Africa's West coast. A \$2 billion venture that the Hemedti-linked company, Al-Juneid, would likely be involved in.⁶⁶ Yet this remains an unlikely prospect in the short and mid-term given Sudan's economic struggles and tightening of China's development finance in recent years. China is still one of Sudan's main trading partners and an active investor across multiple sectors, including in mining. But its role since Sudan lost much of its oil has diminished significantly and other foreign patrons have stepped in.

The Gulf region has long held political influence in Sudan. Rather than China, it is Kuwait and Saudi Arabia that are Sudan's largest bilateral creditors.⁶⁷ Under President Bashir, Sudan sought to balance its dealings (and extract finance, investments, and other benefits) between Turkey and Qatar on the one hand, and Saudi Arabia and the United Arab Emirates on the other. A sim-

60 al Nilin, 2016.

61 Wingo, 2020.

62 Daily Sabah, 2018.

63 Ljubas, 2020.

64 FOCAC, 2020.

65 Patey, 2014.

66 Barber, 2020, pp. 12-13.

67 Leo, 2010.

ilar balancing act was taken with Ethiopia and Egypt.⁶⁸ Oil made this routine feasible. It offered an economic buffer but also an offering for neighboring consumers like Ethiopia. Its loss forced Sudan out of this finely crafted diplomatic holding position. The United Arab Emirates became increasingly engaged in Sudan in recent years, providing investment, finance, and military support. This is largely to counter the influence of rivals in Turkey and Qatar, which have been keen on building ports on the Red Sea at Suakin and making use of Sudanese soldiers in the civil war in Yemen. But just as China was the largest buyer of Sudan's oil, the UAE purchases the vast majority of Sudan's gold, significant portions of which have been smuggled out of the country. Emirati and other international companies are now deeply engaged in Sudan's gold trade and have acted as essential links for Hemedti to monetize the resource and develop his power base.⁶⁹

After the RSF defeated a rival Darfuri armed group led by Musa Hilal in 2017, Hemedti took control of large gold mines in the Jebel Amer area. Demonstrating how sub-national politics and security dynamics around gold extend to the national and international level, the Hemedti linked company, Al-Juneid, both sold gold to the Central Bank of Sudan and exported it directly to the Dubai-based company Rozella.⁷⁰ The world's largest refiner, Swiss-based Valcambi, reportedly sourcing large amounts of gold from the Emirati refiner, Kaloti, which the United Nations has linked to armed groups and rights abuses in Darfur.⁷¹ All this gives the Emirates considerable sway in Sudan's new political economy. After the fall of Bashir, the UAE and Saudi Arabia pledged \$3 billion to Sudan's transitional government but ended official support by the end of 2019 after only providing half the finance, and may be channeling assistance indirectly through Hemedti to support his position.⁷² China's support to the NIF/NCP helped solidify President Bashir's position in Sudan's political economy for decades. The UAE is now leveraging its own influence to do the same for Hemedti while Egypt is providing support to Burhan, indicating that the domestic rivalry between the two generals extends into regional politics.⁷³

The end of American sanctions on Sudan in 2017, its recognition of Israel, and then removal from the state sponsors of terror list in 2020, opens the door for international debt relief and increased political and economic engagement from the United States in the years ahead. The World Bank granted Sudan a \$1 billion bridge loan to ease its arrears shortly after it was taken off the terror list.⁷⁴ American trade and investment may be dissuaded by the poor business climate in Sudan for quite some time to come, but new possibilities exist for economic engagement. Debt relief, financial assistance, and the return of American business to Sudan's oil, mining, and agriculture industries might influence the political budgets of Hemedti and Burhan, and possible offer the civilian government room for maneuver in negotiation with the generals, remains an open question.

In the past, American pressure on Sudan to advance economic reforms, such as the removal subsidies, too forcefully and too quickly led to political turmoil. Under Bashir, the United States also prioritized other foreign and security policy interests over supporting democratic forces in Sudan. Whether Washington will avoid such prioritization in the future will depend on the policy of the new Biden administration and broader changes in regional and international politics. Washington's influence over regional powers in the Gulf may not be as strong as in decades past. Other

68 de Waal, 2019, p. 19.

69 Michaelson, 2020.

70 Abdelaziz, Georgy & El Dahan, 2019.

71 Global Witness, 2020.

72 Gallopin, 2020a.

73 Gallopin, 2020b.

74 Alamin, 2020b.

foreign powers, such as China and Russia, will also continue to vie for influence with Sudan's leaders to advance their own economic and military interests. Sudan's decarbonization amounted to dramatic shifts in its outside relations, but foreign influence and extraversion remain.

CONCLUSION

How does Sudan's experience with decarbonization inform thinking on the durability of political marketplaces? First, the lasting power of Sudan's leftover oil shows that even in exceptional cases, where the loss of oil is so abrupt and deep, ruling regimes can cling onto power and maintain their position in the political marketplace. By exploiting remaining oil resources and tapping into alternative resources, regimes can, at least temporarily, plug gaps in political budgets to maintain the patronage networks that ensure their political survival. For countries with large oil reserves, such as Nigeria, Iraq, and Venezuela, the longevity of oil as a valuable resource may offer present-day political leaders and the political marketplaces in place, considerable staying power, or at least slow transformation of political change and embedded political marketplaces.

Second, new resources do not necessarily change political marketplaces. Sudan demonstrates that even with new political figures at the top, political marketplaces often hold the same attributes as former ones. Existing systems can persist despite political change. What new resources do influence, however, is who rises and who falls within a political marketplace. Bashir first brought Hemedti to the political center to keep his military rivals at bay, but the political ecology of gold, with large mines in Darfur extractable by artisanal miners without large capital investments, leveraged Hemedti's political power. The politics and security dynamics of the sub-national, and Hemedti's capabilities to wield violence to gain control of key gold mines in Darfur, became determining factors in power plays between political elites at the national level. Not any resource would have aided the Darfuri warlord to rise to such heights. The discovery of a large, new oilfield would have hypothetically reenforced President Bashir's power base. A situation where there was an absence of valuable artisanal minerals would have probably acted to increase the use of violence within Sudan's political marketplace. But alongside the threat and use of violence, gold spurred on a significant development in Sudan's elite power base. While Hemedti represents a new and central figure, along with the civilian representatives now in the transitional government, the structure of patronage networks nonetheless are similar to those longstanding in Sudan. New elites and resources replaced Bashir and oil, but the political economy remains largely the same.

Finally, the paper shows how the fluidity and diversity of regional and international relations and commerce allow domestic actors to maintain political marketplaces. The end of oil corresponded with China's disengagement as Sudan's primary economic partner and the UAE and other regional states stepping in. The historical engagement of the Gulf states in Sudanese politics was reenforced by Sudan's loss of oil, which upset its ability to balance diplomatic ties in the region, and the demand of the UAE and Saudi Arabia for Sudan's soldiers to fight in Yemeni civil war. Much like China before with oil, the UAE's central role as an international gold market enlarged its role in Sudan's political economy. With Hemedti essential to the flow of Sudan's gold and soldiers, his position in Sudanese politics advanced dramatically on the back of outside support. The Gulf states may not provide the same finance and political backing China once granted Sudan, but they nonetheless serve the extraversion needs of Sudanese political elite. The days of Sudan's oil boom are over, decarbonization is setting in, but the violent resource politics are likely to continue.

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