

Sudan Business Forecast Report Q1 2012

<https://marketpublishers.com/r/S5EF44F6F4FEN.html>

Date: October 2011

Pages: 33

Price: US\$ 1,195.00 (Single User License)

ID: S5EF44F6F4FEN

Abstracts

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Core Views

Post-secession military clashes along the disputed border between Sudan and South Sudan are likely to continue over the coming months, and a sustained constructive engagement by major world powers will be required if the partition of the two territories is not to herald a return to outright war.

The division of Sudan into separate states is set to unleash a period of marked economic volatility and uncertainty.

Major Forecast Changes

No major forecast changes.

Key Risks To Outlook

Secession is likely to be accompanied by further militia confrontations, with particular risks in Abyei, Unity state, Upper Nile state and Jonglei. These clashes may escalate into outright north-south confrontation – possibly in Abyei at first, but also in the states referred to above – if no oil deal is agreed.

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CHAPTER 1: POLITICAL OUTLOOK

SWOT Analysis
BMI Political Risk Ratings
Domestic Politics
Regime Implosion On The Cards?
The Sudanese regime of President Omar al-Bashir is probably more vulnerable to collapse now than at any other time since he seized power in 1989. However, we expect his government to 'muddle through'.
Foreign Policy
Time Running Out For Post-Secession Deal
Three months after South Sudan's independence, a post-secession political agreement remains absent, ensuring that the risk of a return to outright north-south conflict remains high.

CHAPTER 2: ECONOMIC OUTLOOK

SWOT Analysis
BMI Economic Risk Ratings
Investment Climate
On The Ground In Southern Kordofan
On the back of an on-the-ground visit to war-torn Southern Kordofan, we expect fighting in this oil-rich Sudanese state to escalate when the dry season begins in November, thereby potentially compromising the regime's control of hydrocarbon assets.
Economic Activity I
Minerals To Help Replace Oil In Northern Economy?
With the secession of South Sudan and its oil fields, Sudan is looking for new ways to help bolster the economy and foment growth.
Exploration for deposits of industrial and precious metals may provide an answer, although political risk, investor perceptions and logistical complications all pose constraints to the sector's growth in the medium term.

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South Sudan's prospects for economic growth are characterised by both strong potential and difficult challenges. Successfully navigating the development of the oil sector (including maintaining and establishing transport links), attracting investment and encouraging diversification will all be important long-term priorities for policymakers.

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Secession Poses Key Risk For Long-Term Growth

There is strong economic growth potential in the non-oil sector, but the uncertainties related to the secession of South Sudan generate risks for many variables, particularly the fiscal accounts. We see Sudan's economy (excluding South Sudan) expanding by an annual average 4.0-5.0% over 2012-2021.

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