

Power and influence in Africa: Algeria, Egypt, Ethiopia, Nigeria and South Africa

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Summary

This paper explores the changing power capabilities of Algeria, Egypt, Ethiopia, Nigeria, and South Africa (the 'Big Five') over the next 25 years. Of these countries, Ethiopia and Nigeria are forecast to increase their power capabilities, whereas Algeria, Egypt and South Africa are expected to stagnate or decline. Of the Big Five, two currently punch above their weight – one that is rising, Ethiopia, and another whose growth is stagnant, South Africa. If Nigeria were able to take the necessary steps that would see far-reaching changes to the governance issues and social challenges that currently beset the country, it could become Africa's lone superpower.

POWER PERMEATES EVERY dimension of international relations. Strong states are able to influence the domestic and foreign policy of weaker states and shape regional and even global agendas.

This paper explores the historical distribution of power in Africa and how it is changing over the next 25 years with a particular focus on the capabilities of Algeria, Egypt, Ethiopia, Nigeria, and South Africa (the 'Big Five'). In a context in which Africa both aspires and is expected to take on more responsibilities for development, peace and security on the continent, the question of regional leadership is key.

Africa has been peripheral in approaches to international relations that have tended to focus on so-called 'great powers' or the 'states that make the most difference'.¹ The more recent popular 'Africa rising' narrative has changed this only superficially, and so far only South Africa and, to a lesser extent, Nigeria and Egypt have attracted the attention of scholars and analysts as potential middle or emerging powers. Changes in the global distribution of power, however, will influence Africa's ability to project power, and its capacity for informal and formal alliance building – both continentally and globally.

The Big Five powerhouses of Africa – Algeria, Egypt, Ethiopia, Nigeria and South Africa – will inevitably shape the future of the continent because of their demographic, economic and military size, as well as their historical role as regional leaders. Collectively, these states account for 40%

of Africa's population, 60% of the African economy and 58%² of Africa's military expenditure. These figures are forecast to remain roughly unchanged by 2040.³ Other countries, such as Angola and Morocco, are also expected to increase their capabilities significantly. However, both countries face considerable governance and developmental hurdles and currently punch well below their weight. They cannot be seen as regional leaders, and Morocco has, since 1984, not been a member of the Organisation of African Unity (OAU)/African Union (AU).

The first section of this paper, 'Conceptions of Power' briefly clarifies the author's approach to power and the complexities around measuring and forecasting power.

In a global context, Africa is likely to remain pretty much where it was: at the margins of global power

The second section, 'Africa in the World', sets the scene and places the analysis of power in Africa in a global context. From a global perspective, the forecast projects that Africa will remain pretty much where it is by 2040: at the margins of global power. This despite Africa's sustained high levels of growth and an ongoing broad transformation on the continent over the period.

The third section, 'An overview of Africa's Big Five', explores how Algeria, Egypt, Ethiopia, Nigeria and South Africa are performing in terms of governance, including domestic security, government capacity and inclusion. This section contextualises the analysis of power and highlights the main transitions and challenges that will have an impact on the Big Five's power trajectory.

The fourth section, which looks at the capabilities of Africa's Big Five, uses a new historical measure of relative national power, the Hillebrand-Herman-Moyer Index (HHMI), to forecast the power capabilities of the Big Five to 2040. These countries have the largest current or forecasted capabilities. This section explores their power status using subcomponents of the HHMI to provide a multidimensional perspective using relevant drivers, such as technology, demographics, international interactions, economic size and military might.

Section five, 'From potential to power projection in Africa', explores whether these states are doing more or less than their capabilities would indicate, and how these dynamics are likely to evolve. The findings show that South Africa and Ethiopia do a good job of punching above their current power capabilities. Algeria and Nigeria, on the other hand, punch below their weight in Africa and the world, while Egypt punches above its weight internationally but below its weight in Africa.

The conclusion brings together the main findings of the paper.

Conceptions of power

While undoubtedly a central variable in understanding state behaviour, measuring power remains contested. There is much debate among academics and analysts concerning the components that should be used when calculating power capabilities, and how those components can best be aggregated into a single measure of power. After World War II, the focus of these efforts was generally on quantifying the balance of power held among the former Union of Soviet Socialist Republics, the US and various European states. More recently the focus has been the ongoing transition of



THE COMBINED POWER
OF AFRICA AS A PERCENTAGE
OF GLOBAL POWER IN 2015

power between the US and China. Africa has always been at the margins of such debates.

Early measures of so-called ‘hard power’ tended to emphasise three primary components of power capability: economic, demographic and military strength.⁴ Many other components of power have, however, subsequently been considered in an effort to refine the original broad measures. These include measures of wealth, trade, aid and investment flows, measures of technological capabilities, government capacity and human capital.

Efforts to measure and forecast state power rely on indicators of the general strength and ability of a country to exert influence rather than on any particular outcome of state action. Therefore, measures of power focus on potential, which is tied to a generalised understanding of outcomes.

The HHMI index (see annex) incorporates traditional aspects of capability measures of power (i.e. economic, demographic and military capabilities). However, the index also takes into account in its analysis technology, and measures of formal and informal diplomatic networks. In this paper, the authors rely extensively on the Base Case forecast⁵ in the International Futures forecasting system (IFs) to set out expected future developments with a time horizon of 2040. IFs is a large-scale, long-term highly integrated modelling software system housed at the Frederick S Pardee Center for International Futures at the University of Denver.⁶

The measures referred to above need to be contextualised for Africa. On the continent, state formation and consolidation are ongoing processes. Many capabilities are inwardly focused and national processes for converting capabilities into power projection are constrained. This process of consolidating state capacity may be one helpful way to understand why African states’ ability to express power externally may be limited by domestic instability and other governance deficits.

Africa in the world

The state-based structure of the international system has always been in flux, with countries – and regions – gaining and losing power over time. From the 1960s to the end of the Cold War, the world experienced a bipolar distribution of state power. The end of the Cold War brought about a so-called unipolar moment,⁷ which may now be changing towards another bipolar moment because of the shifting power between West and East, and more specifically the importance of the US and China.

As for the future, some scholars have focused only on the rise of China,⁸ whereas others have emphasised that the world is moving towards a greater degree of multipolarity⁹ before the

mid-century, with potentially four great powers, China, India, the European Union and the US, and a notable reduction in the number of middle powers compared with the past 50 years.¹⁰

The US National Intelligence Council’s report *Global trends 2030: Alternative worlds* notes that one of the four most important megatrends globally is the diffusion of power, which is happening both across states (from West to East, in particular), and from states to networks, non-state actors and other international regimes. The global realignment identified in this report can already be seen just three years after its publication.¹¹ China has risen and its economy was recently re-estimated to be larger than that of the US in purchasing-parity terms.

Within this broader picture of global power redistribution, Africa remains largely at the margins. The total size of the African economy is expected to increase by 29% from \$5.3 trillion to \$18 trillion, but by 2040 its share of the global economy will only increase from 5.1% to 7.2%.

Within the broader picture of global power redistribution, Africa remains largely at the margins

On the other hand, Africa’s demographic share is growing rapidly. In 2014 the total African population was estimated at 1.1 billion people, or 15.6% of the global population. By 2040 Africa is expected to have a population of 2.0 billion people, constituting 21.8% of the global population. To put this figure into perspective, by 2040 Africa’s population will have increased by 820 million people. This is more than the total current population of the European Union (over 500 million people – a figure that will remain largely unchanged to 2040). In the absence of an agricultural revolution that could exploit the massive potential of the associated workforce, Africa will remain largely dependent on food imports to feed its growing population.

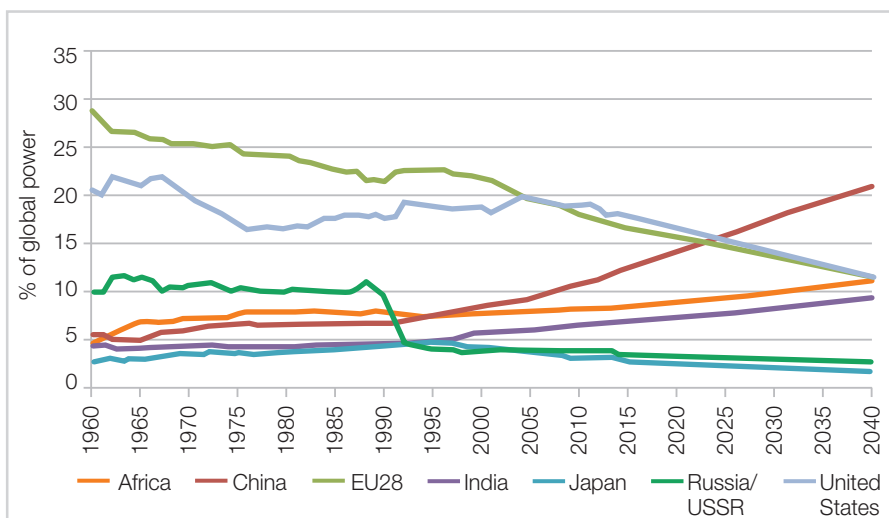
Using the measure of power explored in this paper (see Box), in 2015 the combined power of Africa represents close to 9% of global power (see Figure 1). This figure compares with about 5% in 1962, when the process of decolonisation was in full swing (and Algeria achieved independence).

The Hillebrand-Herman-Moyer Index

The HHMI measures the relative power of countries from 1960 to 2013. This is forecast within the IFs system to 2060. The index includes drivers of national power from the following categories: demographics, diplomacy, economics, military and technology. See the annexure for information on the variables and weights used in the index.

China and the US represent about 12% and 18% of global power, respectively. In 2015, the combined relative power of Africa is larger than that of Japan, Russia or India but less than that of the US, China or the European Union (EU). As for the future, the total relative power of Africa is likely to surpass that of the declining EU and US by 2040.

Figure 1: Global power distribution, history and forecast: HHMI



Source: IFs v 7.08

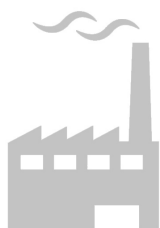
Although the combined capabilities of Africa's 55 countries total about 9% of global power today and are forecast to rise to over 11% by 2040, Africa is obviously neither a sovereign country (but composed of 55 sovereign countries) nor a union of states with any kind of supranational provisions. And even with a great expansion of regional and continental integration, the expression of a unified African foreign policy¹² is highly unlikely. With the potential exception of Nigeria, African countries will remain what have been termed 'minor powers'¹³ and this has implications on how Africa will influence issues of global governance.

Yet, some argue that African states will nevertheless continue to gain greater agency¹⁴ in terms of shaping their own future in a complex and interconnected world. Vickers, for example, observes that:

...notwithstanding [...] structural constraints on African governments' bargaining power, it is significant that African countries in their individual and collective capacities are increasingly active, assertive and confident players on the world stage, influencing international negotiations in areas ranging from multilateral trade to climate change.¹⁵

In general, though, the present authors make the case that only very deep economic and political integration complemented by much more rapid and sustained economic growth in Africa could offset its limited role in shaping global governance.

As Africa is the next regional emerging market after India, manufacturing and services are expected to expand rapidly in the continent – although much of this growth will initially be at the lower end of the value-add curve (albeit higher than the current value derived from commodity exports). Manufacturing growth will continue to gravitate towards the free-trade region that has the lowest cost of labour and greatest domestic stability. This will increasingly include sub-Saharan Africa. One potentially major



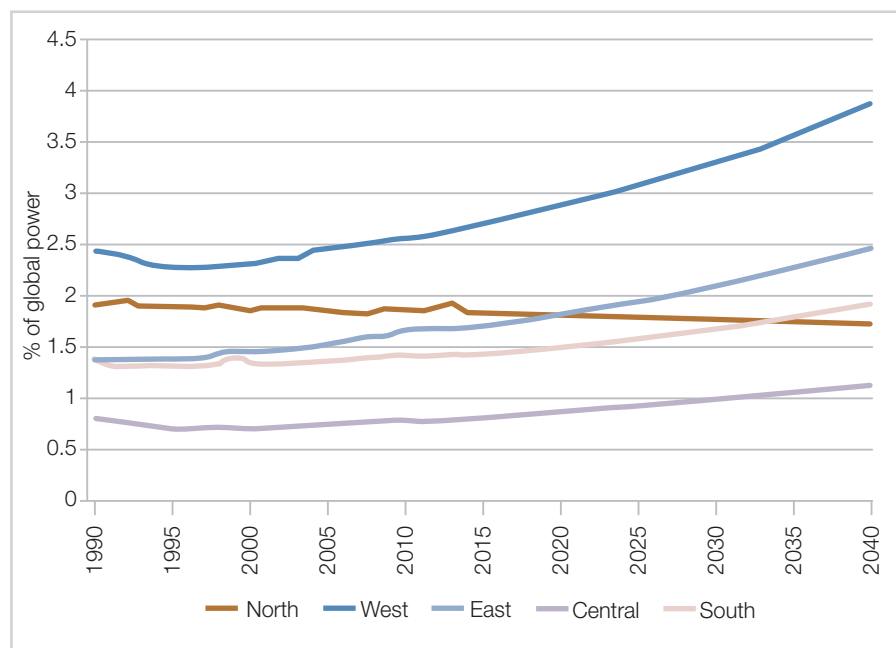
MANUFACTURING GROWTH WILL CONTINUE TO GRAVITATE TOWARDS THE FREE-TRADE REGION THAT HAS THE LOWEST COST OF LABOUR AND GREATEST DOMESTIC STABILITY

determinant of higher future growth rates will be the political and economic integration of current markets – the creation of regional economic communities with common currencies, freedom of movement of labour and capital across borders, and common import and export tariffs.

Population growth could also act as an important driver of economic growth. Earlier work by the African Futures Project¹⁶ has documented demographic growth in West and East Africa,¹⁷ where population sizes will expand more rapidly than in northern and southern Africa. Central Africa will also experience large increases in population, but from a much lower base. It is expected that the populations of northern and southern Africa will have income levels that are three to four times higher per person than in East and central Africa over the forecast horizon, and that West Africa will slowly catch up with the two richer regions.

The HHMI reflects the shifting balance of power in Africa since the end of the Cold War, with West Africa consolidating its position as the most powerful region in Africa (largely due to the presence of heavyweight Nigeria), followed, as from 2021, by East Africa and a fairly stagnant southern Africa. The relative decline of North Africa from its position as second most powerful region in Africa until 2019 to second last (ahead of Central Africa) by 2040 is particularly striking (see Figure 2). These trends follow changes in relative population size and economic growth prospects, among others.

Figure 2: History and forecast – power of Africa’s five regions, measured by HHMI



Source: IFs v 7.09

Overview of Africa’s Big Five: governance, security, capacity and inclusion

This section sets the stage for forecasting national power by exploring how the Big Five compare in terms of governance. The underlying hypothesis is that the strength and quality of governance play a role in understanding how capabilities are translated into power projection in Africa.



THE STRENGTH AND QUALITY OF GOVERNANCE PLAY A ROLE IN UNDERSTANDING HOW CAPABILITIES ARE TRANSLATED INTO POWER PROJECTION IN AFRICA

Governance refers to the way in which a society manages itself. It can be defined as consisting of three broad dimensions: security, capacity and inclusion.¹⁸ These dimensions can provide a context for thinking about the future of power projection in Africa – not least because, in Africa, these transitions tend to occur simultaneously, as opposed to sequentially, as used to be the case historically in the past.

Brief overview

Each country of the Big Five group faces its own set of unique governance challenges. Egypt, Algeria and Ethiopia have to contend with democratic deficits, defined as an imbalance between levels of human development and inclusive access to political systems. These factors can upset developmental progress and lead to bouts of instability. Control of the economies and political systems by elites in these three countries is deeply entrenched. Not even the Arab Spring has been able to shake loose the stifling control of the traditional governing authorities in Egypt and Algeria, and political corruption remains a significant issue in both countries.¹⁹ Ethiopia may be a positive recent example of a successful developmental state, but it continues to respond to internal pressure for democratisation through state repression.

Ethiopia's transition from a conflict-torn dictatorship to Africa's poster child for economic growth and development has been impressive, although little progress has been made in terms of individual freedom and democratisation. Previously unable to feed itself and blighted by regular famines, Ethiopia has since the mid-1990s become a country with a rising calorie supply per capita. Nevertheless, as recently as 2000 it still had the fifth-lowest gross domestic product (GDP) per capita in Africa.

Egypt, Algeria and Ethiopia have to contend with democratic deficits that can upset developmental progress and lead to instability

Ethiopia also suffered what some would claim to be a genocide (known as the Ethiopian Red Terror) under the brutal Derg regime of Mengistu Haile Mariam from 1974 to 1991. The political victory of the Ethiopian People's Revolutionary Democratic Front in 1991 and Meles Zenawi's taking power as prime minister four years later brought stability to Ethiopia and set it on a positive developmental path – although it remains an authoritarian and repressive state. In 2014 Ethiopia had the 11th lowest GDP per capita in Africa and had managed to quell internal dissent. It now acts as the region's main peacekeeper. The country has made much of the fact that it is the only African country not to have been colonised, and the subsequent location of the seat of the OAU (now the AU) in the capital, Addis Ababa, has often served to protect Ethiopia from peer scrutiny.

The majestic Nile links Ethiopia and Egypt, a country that straddles North Africa and the Middle East, and the river is vital to the development of both countries. More Arab than African and with a recorded civilisation going back centuries, Egypt is one of the first nation states in the world. It regained its independence (from Britain) in 1953 – earlier than Algeria, Nigeria or South Africa. Since independence, Egyptian politics (and also much of its economy) have been dominated by the influence of its armed forces. Although it has one of the largest and most diversified economies in the Middle East and Africa, recent years have seen it embroiled in turmoil.

1953

EGYPT REGAINS
ITS INDEPENDENCE
FROM BRITAIN; EARLIER
THAN NIGERIA, ALGERIA OR
SOUTH AFRICA

In 2011 President Hosni Mubarak was forced to step down as the widespread popular protests of the Arab Spring spread across North Africa. During the subsequent elections, the Muslim Brotherhood's candidate was elected to power, only to be ousted by the Egyptian military a year later. A new constitution was drafted and following a lacklustre election campaign, former head of the Egyptian Armed Forces, Abdel Fattah el-Sisi, was elected president in March 2014. With its rich history of Arab nationalism, and support for the Non-Aligned Movement and independence movements globally, Egypt has played an important role in international relations, recently as a regional ally of the US in the Middle East. The Arab League headquarters are in Cairo, and the Secretary General of the League is traditionally an Egyptian. With most of its attention focused elsewhere, Egypt is a distracted member of the AU, although it is recognised as an important country in North Africa.

Much like Egypt, Algeria is trapped in stasis. And similar to Egypt and Nigeria, the Algerian military has played a major role in domestic politics since independence in 1962 – gained after a brutal war with France that lasted eight years and traumatised both countries. Its ailing and elderly president, Abdelaziz Bouteflika, has won four consecutive elections since 1999. Like Nigeria, Algeria's economy is largely based on oil and gas, and it suffers from all the attendant problems known as the 'Dutch disease' and the 'resource curse'.²⁰ Employment creation is minimal, and the terrorist threat in the south raises the issue that oil exploitation may not be predictable in all of the country.

After the introduction of multiparty politics in 1988, the military again stepped into the political sphere to prevent the Islamic Salvation Front from gaining power during elections scheduled for January 1992. The subsequent Algerian Civil War claimed tens of thousands of lives and subsided only after several years. Efforts by Bouteflika, through his Civil Concord initiative, reduced tensions and, together with subsequent efforts, have contributed to national reconciliation.²¹

Unlike Egypt, Algeria was narrowly able to avoid much of the impact from the Arab Spring, which started in neighbouring Tunisia at the end of 2010. But the fallout from the NATO intervention in Libya, which finally clinched the overthrow of Muammar Gaddafi in 2011, ignited turmoil in the region, particularly along Algeria's eastern and southern borders with Libya, Mali and Niger. Tensions between Algeria and Morocco, to the west, complete the picture of a country located in a hostile neighbourhood. Although it contributes little to peacekeeping, Algeria has the highest military expenditure among the Big Five and in Africa as a whole.

Nigeria, the country with the largest economic and power potential on the continent, faces different challenges from the other countries of the Big Five – although it shares a common history with Ethiopia, Egypt and Algeria, having experienced 33 years of military rule since independence in 1960. The Nigerian economy is dominated by its hydrocarbon sector, which suppresses the development of other economic sectors, manufacturing in particular, by increasing the relative value of its currency, the naira. Despite the recent diversification of the economy, with new sectors contributing to the country's GDP, 90% of Nigeria's export revenue still comes from oil.²²

To a large extent, the increase in Africa's role globally will be driven by the future weight of Nigeria

Politics in Nigeria are particularly complex and violent, with many ethnic, religious and social fault lines across society. Deeply entrenched corruption and low levels of government efficiency characterise a country facing huge governance challenges. In 2014 Transparency International's Corruption Perceptions Index ranked Nigeria lowest of the Big Five, at 136 out of 175 countries in the survey, which is significantly below the ranking of the other four.²³

However, in terms of economic potential, no African country can compete with Nigeria. According to the IFs model used in this paper, Nigeria's GDP is forecast to grow from slightly over \$525 billion in 2014 to slightly over \$4.2 trillion by 2040. By 2040 the IFs Base Case forecast is that Nigeria will constitute slightly less than 2% of the global economy, up from 0.7% in 2014. To a large extent, the increase in Africa's role globally will therefore be driven by the future weight of Nigeria – a country that by 2040 will have the fourth largest population in the world after India, China and the US.

As for Nigeria's influence, however, for that to grow would necessitate changes in the current political culture. This is a country that has been embroiled in successive internal wars – the most recent against Boko Haram in the north-east. In Nigeria signs of drift and loss of influence abound. Amuwo argues that Nigeria has effectively lost its pre-eminence in Africa despite the engagement role it plays in West Africa, and more specifically ECOWAS, and that the country does not have a coherent foreign policy.²⁴

South Africa is the only African country that is a member of the G20 and BRICS (the Brazil, Russia, India, China and South Africa grouping), and the only African country of the EU's 10 global strategic partners. This is mainly because South Africa is

the EU's largest trading partner in Africa but it certainly gives the country a global clout that Nigeria currently lacks. Nelson Mandela's profile and the international activism of his successor, Thabo Mbeki, saw the former apartheid pariah state significantly increase its leverage in Africa and globally after 1994, and it simultaneously benefited from several years of healthy economic growth. However, despite the towering image of Mandela and the miracle of the transition to democracy, the so-called Rainbow Nation has become tarnished in recent years.

The country's economic growth rates have declined and in 2014 the Nigerian economy was formally recognised as being larger than that of South Africa. The ruling African National Congress struggles with internal ethical challenges and leadership gaps while growth levels and investor confidence have declined because of the uncertain regulatory framework.

Set out in its National Development Plan, South Africa is caught in a middle-income trap

Underinvestment and poor management of energy, water and education, among others, constrain the growth of a country that boasts a diversified economy and good infrastructure by African standards yet struggles with high levels of inequality, crime, unemployment and poverty.

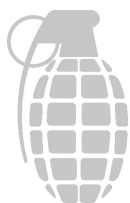
Set out in its National Development Plan, South Africa is caught in a middle-income trap. The country faces two interrelated sets of development challenges in its effort to become a more cohesive high-income society and economy: unequal access to basic services and economic opportunities, and an economic environment with inadequate technology, skills and governance to enable it to rapidly move from middle-income to high-income status. Nevertheless, although still fraught with tensions and a difficult legacy, South Africa has largely completed the social, economic and political transitions that still lie ahead for the other four countries of the Big Five. This probably adds greater predictability in forecasting the future of South Africa compared with the others.

Domestic security

Historically, the first transition to improved governance involves states establishing control over their territory. The analysis and figures that follow quantify the state of security on the continent and in the Big Five by looking at the level and nature of violent conflict in each country.

Recent research carried out by the ISS²⁵ found that Africa and the Middle East are likely to retain their unenviable position as the two regions with the highest conflict burden globally for the foreseeable future. This points to the continued need to invest in conflict prevention, security-sector reform, the rule of law and regional forces, such as the African Standby Force and the African Capacity for Immediate Response to Crises. Currently, nine of the sixteen global peacekeeping operations are sited in Africa and it is reasonable to expect that the mother continent will remain the largest domain for international peace operations in the medium term.

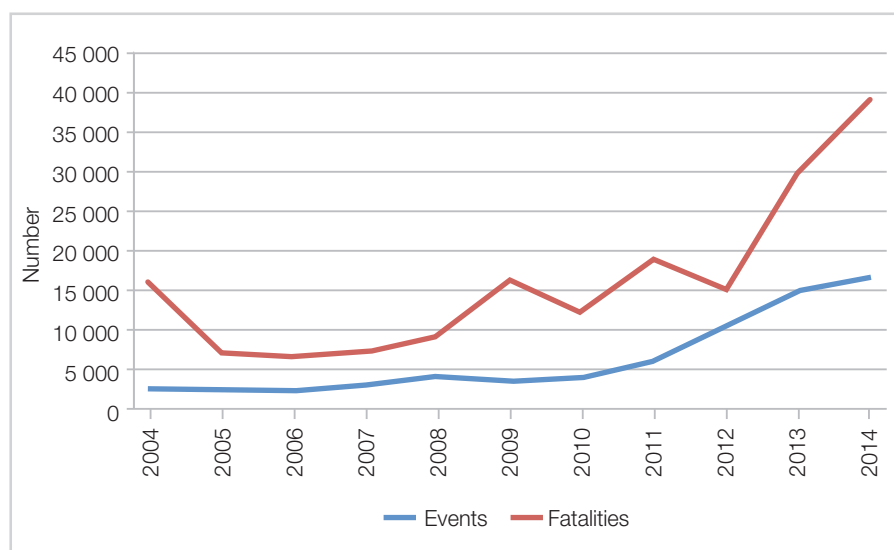
Drawing on various public datasets on instability and violence, the authors analysed the increase in armed conflict and social instability in Africa that started in 2010.



AFRICA AND THE MIDDLE EAST ARE LIKELY TO RETAIN THEIR POSITION AS THE TWO REGIONS WITH THE HIGHEST CONFLICT BURDEN GLOBALLY FOR THE FORESEEABLE FUTURE

In 2014 the number of events and fatalities were still significantly below those experienced during the final years of the Cold War but have been rising for four consecutive years. This trend is reflected in Figure 3, which includes all conflict event and fatalities recorded by the Armed Conflict Location and Event Data (ACLED) over the past 10 years. From 2013 to 2014, ACLED recorded an increase of 12.9% in incidences of violent conflict in Africa. As many as 20 African states experienced an increase in violence over the previous year, indicating that violent conflict is not limited to a few warring regions.²⁶ Moreover, the increase in violent events comes with an increase in fatalities.

Figure 3: Number of conflict events and fatalities in Africa, 2004–2014



Source: Compiled from ACLED country datasets, www.acleddata.com/data/version-5-data-1997-2014/, accessed 23 January 2015

These trends are also visible in the Big Five. From 2011, particularly Egypt and, to a much lesser extent, Algeria were affected by the fallout from the Arab Spring. Collectively, the Big Five account for about 28% of all conflict events and 35% of all fatalities that occurred in Africa in 2014. This is below the number one might expect, since these countries account for 40% of Africa's total population. So, by implication, the Big Five are, as a group, are relatively stable by African standards.

The nature of violence in Africa has also changed in recent years. Today armed conflict between governments and armed militias is still widespread, and battles between armed groups remain the primary cause of conflict-related fatalities in Africa.²⁷ However, social turbulence, violence around elections and terrorism has increased.

Making forecasts of future conflict trends in Africa is complicated by a toxic mixture of poverty and inequality, religious radicalisation, poor governance, and high levels of corruption, which are offset by the countervailing effects of increased government capacity, spending and effectiveness, and positive growth prospects for Africa. In fact, the process of development in itself is messy and can fuel or accentuate imbalances in social systems and in the economic, political or social sphere.²⁸ In the case of the Arab Spring, for example, it was not generally low levels of development that drove those states to tipping points: the disequilibrium between relatively high levels of human development and low access to political and economic systems led to the instability.²⁹

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The authors of the ISS publications referred to above argue that, over time the historical downward trend towards fewer incidents and fatalities (measured per million people) should resume, although the future of terrorism remains a wildcard for the continent.

In line with the general trend in Africa (and the Middle East), the Big Five all experienced an increase in political violence since 2010, although the level and extent of conflict varies. Furthermore, each country is affected by very different types of threats to its stability. Conflict patterns range from a high level of violence – both in absolute and proportional terms – against civilians in Nigeria to the dominance of battles between armed groups, mostly state forces and rebel opposition units, in Ethiopia.

In line with the general trend in Africa (and the Middle East), the Big Five all experienced an increase in political violence since 2010

Researchers from ACLED³⁰ argue that, comparatively, the Big Five represent examples of different dominant forms of conflict:

- Algeria and Ethiopia can both be seen as strong states with high military capacity, a rebel presence, but relatively low violence overall, and a fairly fractured opposition that seems unable or unwilling to capitalise on the situation to its advantage (unlike in Nigeria).
- South Africa's conflict profile is dominated by internal party struggles (as militia and rioting behaviour indicates), and high levels of popular protest, which is occasionally violent, although the rates of peaceful protest attest to an otherwise fairly coherent democracy. Peace and development in South Africa are compromised by high levels of criminal, rather than political, violence.
- Egypt is a country in transition, with high violence and multiple, discrete threats directed against the state. Over the past two years, there has been a clear shift towards repression of the opposition, although the opposition remains more potent than in Algeria and Ethiopia.
- Nigeria is a much more fractured regime, with a more vocal opposition. In spite of a recent tendency to focus on the threat of Boko Haram in the north-east, the country is affected by multiple, discrete, albeit nascent or dormant threats, as part of a wider political economy of violence, in which violence is repeatedly used by elites seeking to renegotiate access to resources, power and representation. This is the case, for example, in the Niger Delta, the Middle Belt and the north-east.



SOUTH AFRICA IS
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The role of conflict actors also varies according to the context of each country in question. For example, conflict in South Africa is dominated by protests, whereas a very small number of protests take place in Ethiopia (a phenomenon explained by the repressive nature of the regime). Trends in Algeria and Nigeria suggest gradually increasing incidences of public protest, reflecting a gradual expansion of the public space in which demonstrations take place. National dynamics are, of course, shaped by the region. For instance, the proportion of violence incurred by rebel groups in Algeria has declined significantly over the course of the past 10 years, but the

movement of some of the militants to neighbouring countries underlines Algeria's regional role and the endurance of the underlying drivers of this violence.³¹

Measures of power, such as the HHMI, do not take domestic security into account,³² but the authors hypothesise that domestic instability can play a role in the projection of power where absolute levels of state capabilities to address instability are low and the government does not effectively control all of its territory.

Once domestic instability crosses a certain threshold (such as the situation in Nigeria with Boko Haram, for example), domestic priorities could draw attention and resources away from foreign-policy projection. In Egypt increased domestic security challenges also appear to be distracting it from external engagements, whereas in Ethiopia, improved internal stability, in combination with an anocratic regime with clear foreign-policy goals, has allowed that country to project considerable power in the Horn of Africa region.³³

Capacity and inclusion

The second transition to improved governance entails a process of professionalisation through which states become more competent and effective, or, in other words, more capable.³⁴ A more capable state is by definition a more effective one in terms of its ability to implement policy, enforce legislation and deliver services.³⁵ This has implications for the formulation and implementation of its foreign policy and therefore power projection, because a state needs to convert its power capabilities through national processes before it can project power.³⁶ This process reflects the difference between potential and actual power projection.

South Africa and Nigeria have been relatively stagnant in terms of governance; there is a trend towards improved governance in Ethiopia and Algeria; and Egypt has been regressive

The third transition to improved governance involves the process of states becoming broadly and deeply inclusive and participatory – in other words, more democratic.³⁷ There is some contention over which indicators should be included when measuring the level of democracy of states but the progression of formal democracy, understood as the presence of contested elections and their success in replacing leaders over time, is one valid indicator.³⁸

The Mo Ibrahim Foundation hosts the most comprehensive and detailed collection of data on African governance, in the form of the Ibrahim Index of African Governance (IIAG). In 2014 the Foundation released its findings for 2013. The results indicate a very slow improvement in governance ranking, with the continent achieving an average score of 54.4 out of 100. The IIAG scores for the Big Five states are as follows:

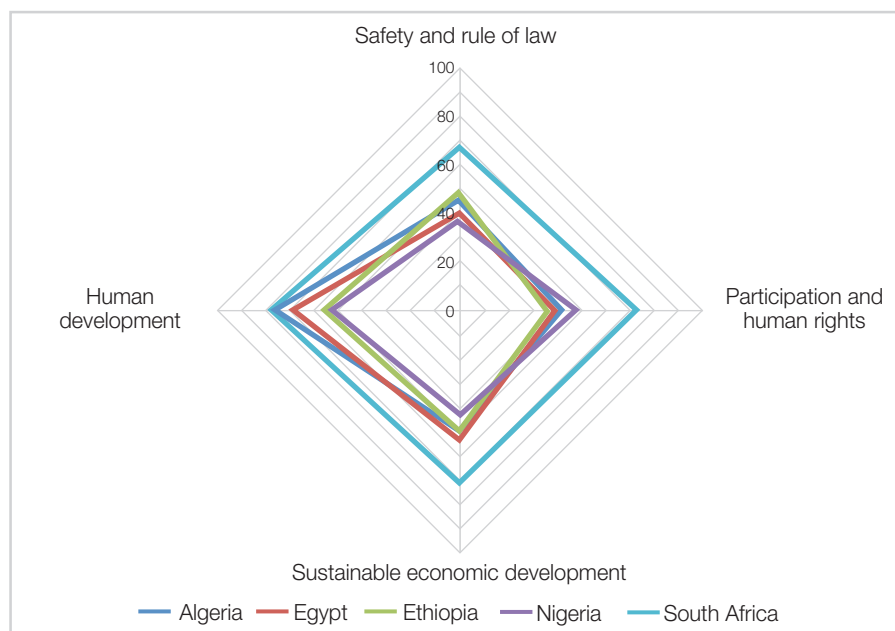
- South Africa is fourth in the continental ranking and highest of the Big Five, with an overall score of 73.3 out of 100, having improved its score by 0.5% over the past five years.³⁹
- Algeria ranks 20th, with an overall score of 54.4, having improved by 1.4% over the past five years. Algeria's score corresponds with the African average; Egypt, Ethiopia and Nigeria all score below the average.
- Egypt ranks 26th, with a score of 51.1, having experienced a decline of 8% over the past five years.
- Ethiopia ranks 32nd, with a score of 48.5, having improved by 2.1% over the past five years.
- Nigeria is 37th, with a score of 45.8, having improved by 0.6% over the past five years.

The picture that emerges, then, from these rankings is that South Africa and Nigeria have been relatively stagnant in terms of governance, there is a trend towards improved governance in Ethiopia and Algeria (at least to some extent), and Egypt has been regressive.

The four conceptual subcategories of governance for the IIAG are safety and rule of law; participation and human rights; sustainable economic opportunity; and human development. The radial graph in Figure 6 compares the results of the Big Five in each of these subcategories. Nigeria scores the worst in three of the four dimensions, although, interestingly, it ranks second (after South Africa) on participation and human rights. South Africa ranks highest in all dimensions.

There is likely to be a positive correlation between the score for participation and human rights, and the regime types of the Big Five. In other words, the more democratic the state, the higher the scores for participation and human rights. On the Polity IV⁴⁰ scale established by the Polity Project,⁴¹ which classifies countries according to their regime type, South Africa is the only country of the Big Five considered a democracy, followed by Nigeria and then Algeria, which are both classified as open anocracies. Egypt and Ethiopia are classified as closed anocracies.

Figure 4: Comparing the four dimensions of the Ibrahim Index of African Governance (IIAG)



Source: www.moibrahimfoundation.org/iiag/, accessed on 4 January 2015

Over the last 20 years, South Africa has made a transition towards greater inclusion (reflecting the transformation from a race-based economy). It is the only country among the Big Five that has embarked on a comprehensive inclusion transformation – even though this transition is incomplete.

Contrary to the fairly balanced picture of South Africa's governance level, with its high scores in all four dimensions, the situation with some of the other countries is skewed. Governance scores for human development are relatively high in Algeria and Egypt, for example, but the lack of capacity in all other dimensions of governance, particularly participation and human rights, is evident. This indicates a major imbalance that makes both countries potentially vulnerable to incidences of abrupt sociopolitical change, such as occurred during the Arab Spring. In those countries, relatively high levels of human development, including education, clash with generally low levels of access to political systems.

Ethiopia scores even worse on participation and human rights.⁴² However, because levels of human and economic development are much lower there, while state capacity for repression is high, instability is less likely to occur – a situation that may change in the medium- to longer-term future if Ethiopia were to maintain high levels of growth and development, which appears a likely scenario.

Nigeria does not show any obvious imbalances in its social systems but the country generally scores low in all the sub-indicators, with the exception of participation and human rights. Nigeria's governance deficit is particularly evident in terms of safety and rule of law, and sustainable economic opportunity. These are due to high levels of conflict, as described in the previous section, and high levels of poverty, both in absolute and in relative terms.

The only country of the Big Five that does not show lower levels of democracy than would be expected given its level of human development is South Africa. Ranking second is Nigeria, where levels of democracy largely match low levels of development –



IN TERMS OF GENDER EMPOWERMENT, SOUTH AFRICA RANKS FIRST, FOLLOWED AT A SIGNIFICANT DISTANCE BY ETHIOPIA, ALGERIA, EGYPT AND NIGERIA

although the deficit is forecast to rise in the future using IFs. Both Ethiopia and Algeria show relatively high democratic deficits, which are forecast to increase slightly until 2040 – although these are not as pronounced as in Egypt.

Using gender empowerment, South Africa also ranks first, followed at a significant distance by Ethiopia, Algeria, Egypt and lastly Nigeria. All countries are expected to experience modest improvements over the coming decades.⁴³

The objective of this section has been to provide a framework for the subsequent discussion about power in terms of the capabilities of the Big Five. The next section looks at how these states are likely to evolve up to the 2040 time horizon, in line with the authors' hypothesis that governance can act as a mediating factor when it comes to the projection of power on the basis of a country's capabilities and potential.

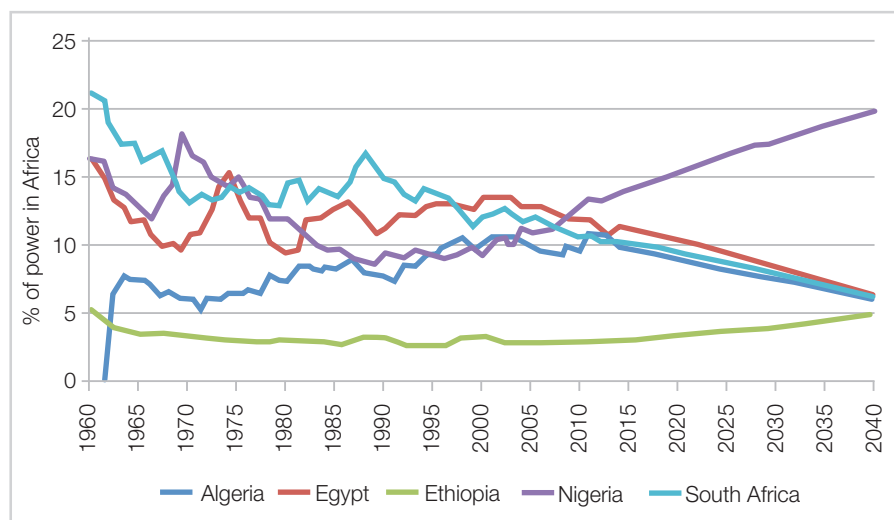
Capabilities of the Big Five

Using the HHMI, Figure 5 measures the power of the Big Five historically and forecasts their capabilities through to 2040. The African country with the greatest capabilities is by far Nigeria, which accounts for 0.9% of global power today, forecast to rise to 1.6% of global power by 2040. Nigeria is followed by Egypt, South Africa, Algeria and Ethiopia, which all remain below 0.7% of global power over the time horizon.

If one looks at the relative distribution of power only in Africa, where the combined power of the continent's 55 states comes to 100%, then by 2040 Nigeria is forecast to account for nearly one-fifth of the continent's total capabilities (See Figure 5), followed by Angola with close to 10% (a country that is not covered in this analysis, but which nevertheless doubles its capabilities between 2014 and 2040). In 2040, frontrunners Nigeria and Angola are followed by Egypt, South Africa and Algeria, which each represent around 6% of total African power. Ethiopia steadily increases its share from 3% in 2014 to 5% in 2040. Morocco, another outsider, catches up, reaching over 3% by 2040.

In summary, using either a global or African unit of reference, the capabilities of Nigeria and Ethiopia are expected to grow considerably. The capabilities of Egypt, South Africa and Algeria are forecast to remain stagnant in relative terms or experience a slight decline.

Figure 5: History and forecast – power of the Big Five, measured by HHMI



Source: IFs v 7.08

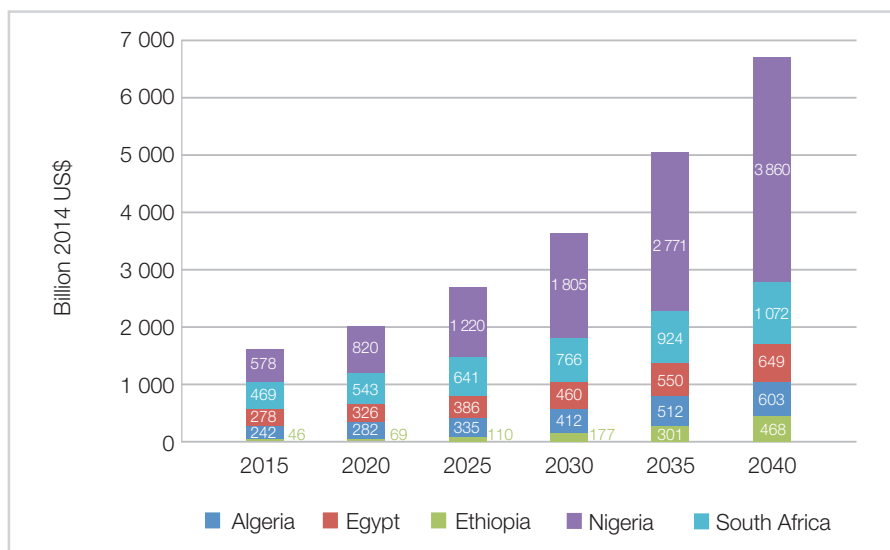
The economy

In 2014 only six African countries had economies with a GDP larger than \$100 billion (in real market exchange rates):

- Nigeria (\$536 billion)
- South Africa (\$454 billion)
- Egypt (\$263 billion)
- Algeria (\$233 billion)
- Angola (\$126 billion)
- Morocco (\$116 billion)

Ethiopia was the 11th largest economy in Africa, with a GDP of \$43 billion. But, although Ethiopia's GDP was 12 times smaller than that of Nigeria in 2014, at the end of the forecast period in question it is estimated that Ethiopia will be the sixth largest economy in Africa and only eight times smaller than that of Nigeria (see Figure 6). This reflects faster rates of convergence.⁴⁴

Figure 6: Base Case forecast of GDP in MER (five-year moving average)



Source: IFs v 7.09

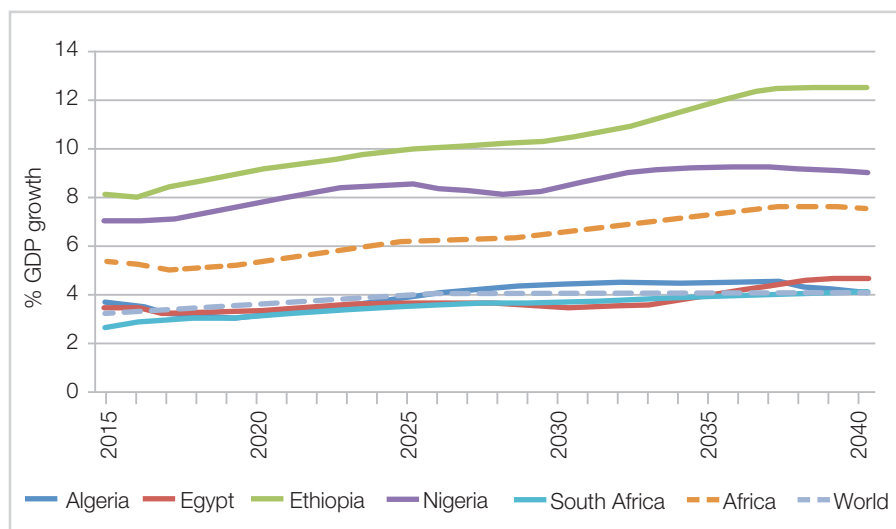
Economic growth in Africa is driven by long-term investments in health, education, reductions in foreign-debt burdens, access to information-communication technology and improvements in governance. Although there have been general improvements in these variables and associated trends for the past 15 years, each of the Big Five has a unique economic-production profile.

According to the IFs Base Case forecasts for the period 2015 to 2040 (see Figure 7), Ethiopia is expected to achieve the highest average growth rate of the Big Five – on average, almost 2% faster than the 8.3% of Nigeria. Whereas Algeria, Egypt and South Africa are expected to grow below the African average rate of 6.3%, and roughly in line with the global average, Nigeria and Ethiopia are both expected to grow much faster. Nigeria, already the largest economy in Africa, and representing over 1.5% of the global economy, is forecast to represent nearly 3% of the global economy by 2040, close to the economic output of Germany and greater than that of France in 2013.

3%

THE PERCENTAGE OF THE GLOBAL ECONOMY THAT NIGERIA IS EXPECTED TO REPRESENT IN 2040

Figure 7: Base Case forecast of average GDP growth rates, 2015–2040 (five-year moving average)

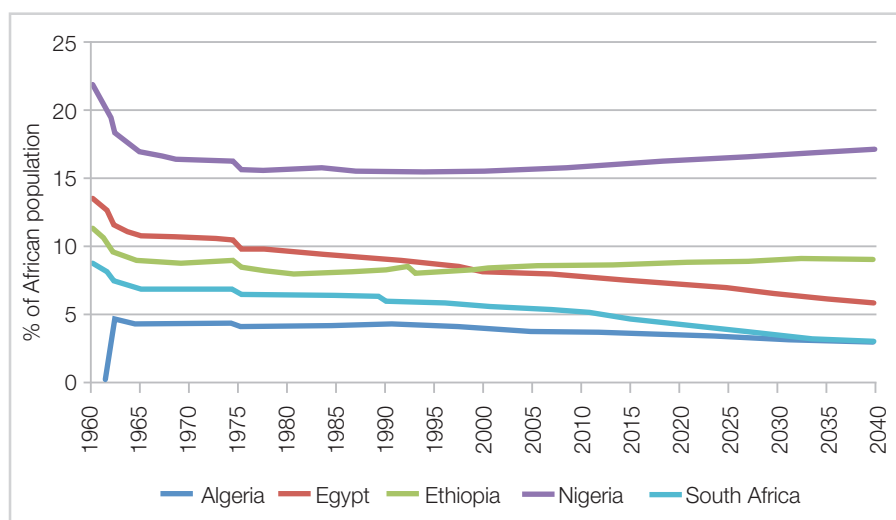


Source: IFs v 7.09

Demographics

Each of the Big Five's populations – taken as a percentage of the global population – is expected to grow to 2040, except for South Africa's (see Figure 8). Currently, Egypt (85.3 million people) has double the population of Algeria (40.8 million); Nigeria (183.1 million) has more than double the population of Egypt. By 2040 the combined population of these five countries will exceed 710 million, significantly more than the population of Europe or North America. Three countries, South Africa, Egypt and Algeria, have much lower total fertility rates than Nigeria (which has the highest in the group). Nigeria is forecast to have a population of over 320 million by 2040, and Ethiopia to have more than 170 million. Again, one can notice an upward trend for both Nigeria and Ethiopia, and a stagnant trend for South Africa, Egypt and Algeria. This upward trend has to do with lower general levels of development, which are associated with higher fertility rates.

Figure 8: Population sizes of the Big Five as percentage of African population



Source: IFs v 7.09

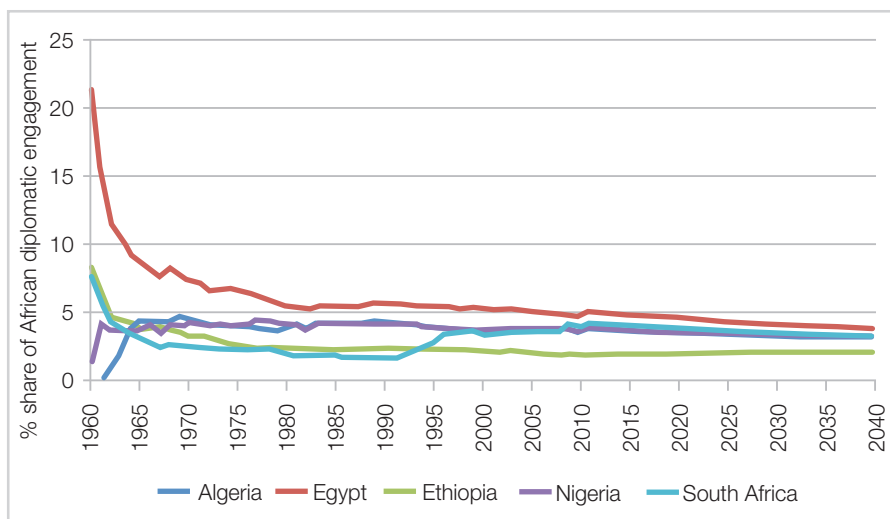
Diplomatic engagement

Figure 9 presents the relative share of global diplomatic engagements among the Big Five.⁴⁵ The dataset measures three kinds of diplomatic interactions:

- The number of embassies a country has in the world.
- The number of memberships of international organisations, weighted by importance of these organisations.
- The number of treaties held by the UN secretary-general signed or ratified by a country, weighted by treaty importance.⁴⁶

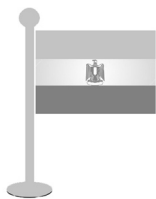
Figure 9 shows that Egypt has traditionally dominated this category of foreign-policy power projection, followed more recently by South Africa, Nigeria, Algeria, and Ethiopia. The increase in the level of South Africa's diplomatic engagement after the end of apartheid is clearly evident in Figure 9, illustrating the country's successful reintegration into international affairs over the last 20 years.

Figure 9: History and forecast of international diplomatic interactions



Source: IFs v 7.08

Egypt's strategic location, and its important role in Arab and African nationalism have ensured that this country is deeply connected internationally. It is not surprising that Egypt is therefore the African country with the most foreign embassies – and has remained so even after the surge in interest and activism by South Africa since the end of apartheid in 1994.

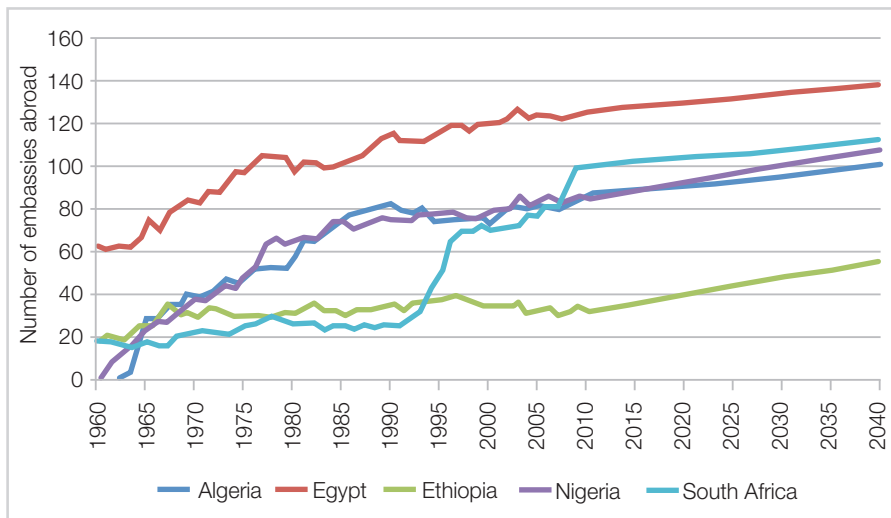


EGYPT IS THE AFRICAN COUNTRY WITH THE MOST EMBASSIES ABROAD

Egypt has traditionally dominated when it comes to diplomatic engagements

Figure 10 illustrates that Egypt has the largest embassy footprint of the Big Five, with 125 embassies in foreign countries in 2014. Ethiopia lags behind in the group and is expected to only slowly increase its number of embassies.

Figure 10: History and forecast of number of foreign embassies



Source: IFs version 7.09

In contrast to the period before 1994, there is little difference in recent years between Algeria, Egypt, Nigeria and South Africa when it comes to the ratification of treaties and membership of intergovernmental organisations. Before 1994 South Africa and Ethiopia were the two countries that fared worst in these two aspects, and today Ethiopia remains the least internationally connected of the Big Five. Commenting on recent trends, Maru points to the ‘inward-looking foreign policy orientation’ of Ethiopia, a country that has focused on security in its immediate region and is performing poorly in matters of economic diplomacy. According to this analyst, ‘efforts to address longstanding internal political instability loom large in its external relations’.⁴⁷

Ethiopia has the weakest embassy footprint of the Big Five but plays an important role in the Horn of Africa

Ethiopia’s Foreign Affairs and National Security Policy and Strategy makes it clear that foreign policy is subservient to Ethiopia’s internal policies, which prioritise economic development, stability and democratic governance.⁴⁸ Ethiopia has successfully dominated the Intergovernmental Authority on Development (IGAD), through which it pursues its regional objectives. And although Ethiopia chaired the New Partnership for Africa’s Development (NEPAD) for almost eight years and the AU Commission’s headquarters is in the Ethiopian capital, it is perhaps no surprise that the country has the fewest embassies of the Big Five, and is a signatory to fewer international treaties and a member of fewer international organisations than the others in the group.

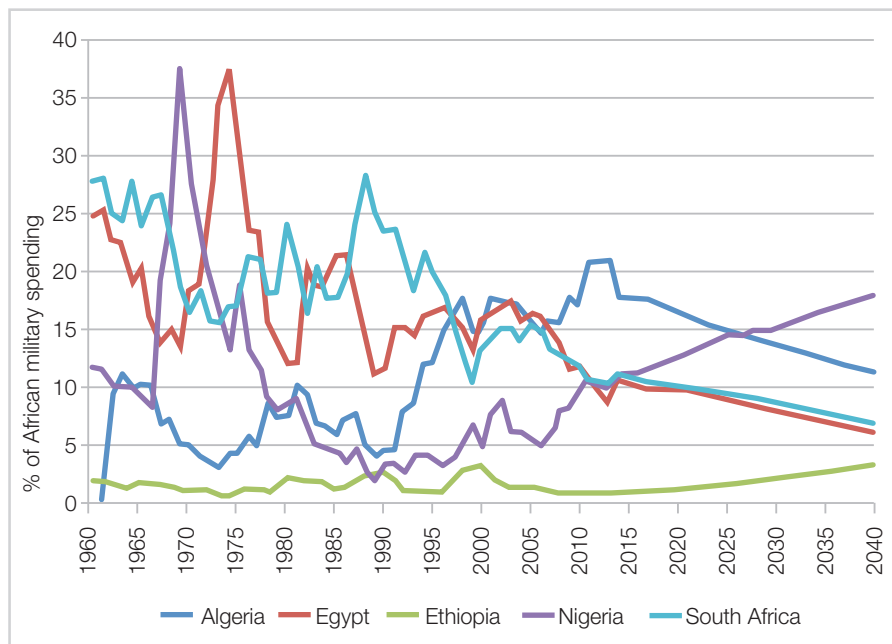
Military spending

The size and quality of a country’s military force is a traditional indicator for measuring national power. Figure 11 compares the share of the Big Five’s military capabilities since 1960 as a percentage of total military expenditure in Africa and shows the forecast through to 2040.



THE SIZE AND QUALITY OF A COUNTRY’S MILITARY FORCE IS A TRADITIONAL INDICATOR FOR MEASURING NATIONAL POWER

Figure 11: Big Five share of African military spending, history and forecast



Source: Combined from the United States Arms Control and Disarmament Agency and the Stockholm International Peace Research Institute

Absolute military expenditures for Algeria and Nigeria have increased modestly in recent years, whereas for Egypt, Ethiopia and South Africa they have remained relatively flat. Algeria and Egypt have had to contend with the fallout of the Arab Spring in North Africa, which culminated in the overthrow of the dictatorial regime of Mubarak and the Muslim fundamentalist rule of Mohamed Morsy – only for the military to later reassert its influence with El-Sisi’s appointment as president. After NATO’s intervention in Libya and the death of Gaddafi in October 2011, the arms that flowed out from Libya have fuelled regional instability. North Africa has thus far only seen a stable, if tenuous, transition in one country – Tunisia – and instability affects Algeria’s security along its eastern, southern and western borders.

At the same time that global oil and gas prices have fallen sharply, reducing its revenues, Nigeria has been caught in an intensifying five-year insurgency with Boko Haram in its north-east, which, by the end of 2014, had displaced 1.5 million and resulted in the deaths of more than 10 000 people in 2014 alone.⁴⁹ Part of a regional challenge, Boko Haram is also active in Chad, Niger and Cameroon and has recently pledged allegiance to the Islamic State.

For its part, and beyond its various internal challenges, Ethiopia has a frozen conflict with Eritrea, insurgency in Somalia and war in neighbouring Sudan/South Sudan to contend with in the region.

Since the end of apartheid, South Africa is the only country in the group at peace with its region, which is reflected in the dramatic decline in defence expenditure since 1994.

In 2013, the latest year for which the Stockholm International Peace Research Institute published data, Algeria accounted for 17% of Africa’s total military expenditure and has, since 2008, had the largest military expenditure in Africa. Algeria’s military expenditure has grown at 11% per annum since 1988⁵⁰ and it spends more than three times more



THE INTENSIFYING BOKO HARAM INSURGENCY IN NIGERIA’S NORTH-EAST HAD, BY THE END OF 2014, DISPLACED 1.5 MILLION

on the military as a proportion of GDP than South Africa, Ethiopia or Nigeria, and almost double the share spent by Egypt. High oil revenues appear to have been a factor driving Algeria's military spending increases. Recent declines in oil prices should therefore place significant pressure on future increases on military spending.

In 2014 Nigeria's military budget increased substantially with an additional \$1 billion allocated to the military in response to the growing threat of Boko Haram. This has pushed Nigeria into the same league as Egypt in terms of its annual military budget but it is still significantly below that of Algeria or Angola.

Of the Big Five, Ethiopia spends the least on its military – both in absolute numbers and as a proportion of its GDP – and this share continued to decline in 2014. Historically less developed countries can leverage their military spending into more power because of lower wages and other costs. Discussed elsewhere, this translates into significant deployment on peacekeeping by Ethiopia.

Although African military expenditure as a share of GDP is slightly less than global expenditures – around 2% of GDP compared with 2.5% of GDP globally – it is significantly less than half the expenditure in the other high-conflict region, the Middle East.

In June 2014 the ISS published a policy paper on the recently completed South African Defence Review.⁵¹ The paper commented on the mismatch between ambition and capacity, and noted the extent to which Africa remains reliant on European and US force enablers, such as strategic and tactical airlift: 'The potential locomotives of Africa's development and stability – countries such as Nigeria, South Africa, Algeria, and Egypt – do not have commensurate military capacity,' to match their foreign-policy ambitions.⁵² The need for France, the UK, and to a lesser extent the US (and the UN), to militarily intervene in Africa reflects the constrained conflict-management capacity available on the continent.

African military expenditure is at odds with the relatively high levels of violent conflict on the continent

This gap in Africa's military capabilities means that foreign organisations and countries support Africa in the mitigation of violent conflict. As this gap is closed and domestic conflict is reduced, it can be expected that African countries will be able to spend more of their resources on the foreign expression of influence. But this transition is still far from being realised.

Technology

Technology is a central component of projection of power for any state in the international system. It is also a component of each of the other four aspects of power discussed in the previous sections. To be able to measure a general 'amount' of technology in a given country, the HHMI includes a sub-measure that takes GDP per capita at PPP and multiplies it by GDP at market exchange rate (MER).⁵³ Countries that excel in this measure are large and technologically advanced.

On a per capita basis, Ethiopia is forecast to remain the poorest among the Big Five and significantly below the African average throughout the time horizon under analysis. Despite its legacy of instability, poor governance and corruption, the steepest rise

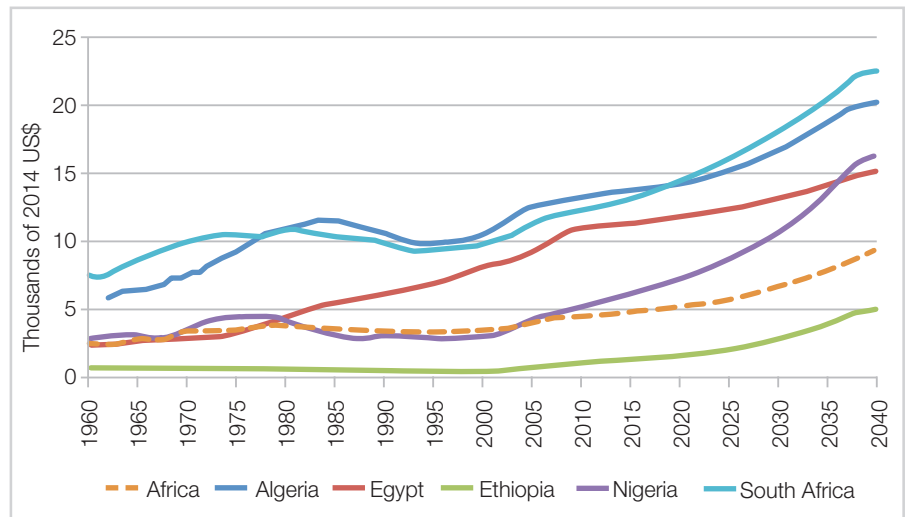


TECHNOLOGY IS A CENTRAL COMPONENT OF PROJECTION OF POWER FOR ANY STATE IN THE INTERNATIONAL SYSTEM

in GDP per capita is forecast for Nigeria. After having stagnated for several decades, improvements started in 2000 and are forecast to continue, with the result that by the end of the time horizon, Nigeria's GDP per capita will surpass Egypt's.

South Africa and Algeria have traditionally had the highest GDP per capita among the Big Five, followed by Egypt – a situation that is forecast to continue until about 2036 when Nigeria's GDP per capita is forecast to surpass Egypt's. Figure 12 compares historical and forecasted GDP per capita levels for the Big Five.

Figure 12: History and forecast of GDP per capita for the Big Five



Source: IFs v 7.09

When general economic production is combined with per capita production, South Africa stands out as a large, highly technical country compared with the rest of the continent. In fact, from 1960 to today, South Africa retains an advantage in the Big Five for this variable. This share, however, is forecast to decline, as Nigeria's general technology and economic mass are forecast to increase significantly to the end of this time horizon.

This share also declines for Algeria and Egypt – two countries where slow growth in GDP per capita is forecast. For Ethiopia, this measure remains very low, but begins to grow by the end of the analytic time horizon.

From potential to power projection in Africa

The analysis thus far has looked at African power in the global and African contexts, and at the Big Five in terms of governance, with a focus on domestic security, and finally at the economic, demographic, diplomatic, military and technological capabilities that are included in the HHMI power index. The point has been reiterated that power is as much about potential as about projection or concrete outcomes, and that capabilities need to be translated into power projection via national processes.

Assessing a country's influence is as complex as measuring its capabilities. Indicators for a country's influence can only be proxies, and any analysis is subject to a considerable degree of subjectivity. Two potential ways of assessing influence in the foreign-policy domain in the African context may be, firstly, to look at a country's commitment to peacekeeping missions, and, secondly, its membership in the AU's Peace and Security Council (PSC). Given the heavy conflict burden Africa is facing,

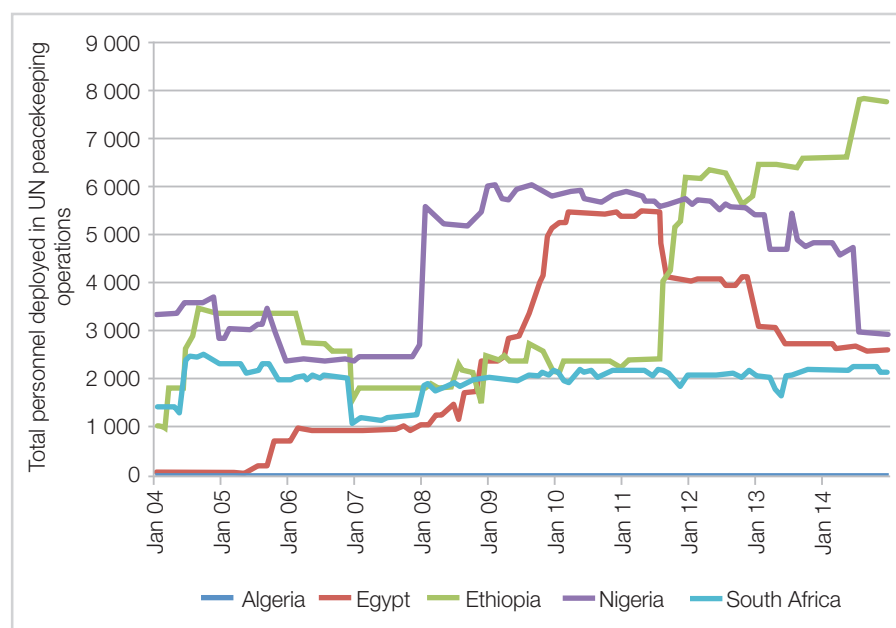


ONE POTENTIAL WAY OF ASSESSING INFLUENCE IN THE FOREIGN-POLICY DOMAIN IN THE AFRICAN CONTEXT MAY BE TO LOOK AT A COUNTRY'S COMMITMENT TO PEACEKEEPING MISSIONS

and is likely to be subject to in the future, a country's commitment to contributing to peace and security as a regional or international public good is an important indicator of its leadership qualities, ambitions and influence. It also tells us something about the capacity of a country to formulate and implement a coherent foreign policy.

Figure 13 presents the personnel contribution of the Big Five to UN peacekeeping operations over a period of 10 years. In January 2014, four of the Big Five, on average, contributed 14% of the total number of UN peacekeepers, down from 19% in July 2012, but still considerably more than in early 2007, when they only contributed 8% of total UN peacekeepers.

Figure 13: Personnel contributed by the Big Five to UN peacekeeping missions



Source: Compiled from www.un.org/en/peacekeeping/resources/statistics/contributors_archive.shtml, accessed 8 March 2015

Algeria, despite being the country with the largest military expenditure in Africa by a considerable margin, has never contributed more than 20 military observers per month and on average around six. At the end of 2011, Ethiopia became the largest African contributor to UN missions, overtaking Nigeria. Three years later, Ethiopia was contributing on average more than 7 800 troops, observers and police officers to UN missions – more than the combined total of the other four members of the Big Five.

In December 2014, Ethiopia was not only the largest African contributor to UN missions but also the fourth largest globally, while Nigeria fell to occupy rank eight, behind Rwanda and Ghana. Like Pakistan, Bangladesh, Ghana and others, Ethiopia has found that participation in UN missions is a cost-efficient way to augment its small military budget and professionalise its armed forces. This approach allows Ethiopia to punch above its weight in peace and security matters on the continent.⁵⁴

With the exception of Algeria, which has always played a very limited role in UN peacekeeping, all the other Big Five countries rank above South Africa, which nevertheless is a consistent contributor to peacekeeping efforts. Egypt's contribution to peacekeeping took two significant dips from July 2011 onwards when it

DECEMBER
2014
ETHIOPIA IS THE LARGEST
AFRICAN CONTRIBUTOR
OF TROOPS TO UN MISSIONS,
AND THE FOURTH
LARGEST GLOBALLY

was providing 5 632 troops to UN missions. By August 2011 the number of Egyptian troops had fallen to 4 126, thereafter continuing its decline to 2 585 in October 2014. In December 2014, Egypt was the 10th largest contributor to UN peacekeeping globally and the sixth largest in Africa as domestic security concerns appeared to take priority.

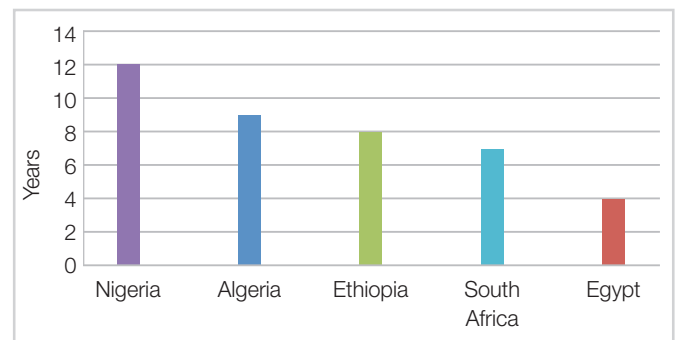
Recently, Nigeria has also witnessed a substantial decline in the number of troops deployed: from a high of 6 020 in August 2009 to 2 930 in December 2014. The quality of Nigeria's contribution to international peacekeeping efforts also seems to be declining in comparison with the 1990s, when Nigeria played an active role in managing two civil conflicts in Liberia and Sierra Leone. Adebayo notes that today, 'the quality of [Nigeria's] soldiers has been questioned; its military and police contingents have often not been equipped to UN standards; and many of the country's Armoured Personnel Carriers (APCs) have broken down in mission areas'. This, Adebayo notes, 'has resulted in frequent complaints from the UN Department of Peacekeeping Operations, damaging the country's impressive peacekeeping record painstakingly built up over five decades.'⁵⁵ This deterioration in both quantity and quality has also meant Nigeria's loss of top mission leadership positions in the UN to other countries, including the special representative of the secretary-general, force commander, deputy force commander, sector commanders and police commissioners.⁵⁶

As mentioned, a second way of assessing influence in Africa is to look at countries' membership of the AU's PSC (see Figure 14).

It is questionable whether South Africa will be able to continue to punch above its weight in the future

The PSC was established at the heart of the AU's African Peace and Security Architecture. Countries are voted onto the PSC for two- or three-year terms based on broad criteria. The original intention was that more powerful countries would be re-elected on the three-year ticket, effectively remaining indefinitely on the council. Hence, Nigeria has consistently served on the PSC since 2004 on behalf of West Africa – an indicator of the country's significant sub-regional influence. In all other regions, members of the Big Five have rotated in the PSC in favour of regional contenders – itself an interesting indicator of how the Big Five are each perceived in their respective regions. With its long history of destabilisation in the region, South Africa has therefore not served on the PSC in a similar consistent manner, whereas representation on behalf of North Africa, for example, has been shared among Algeria, Egypt and Libya.

Figure 14: Number of years served on the AU Peace and Security Council



Source: PSC Report, ISS, Addis Ababa

The question is, what drives Ethiopia's disproportionate influence in relation to its capabilities and Nigeria's stalemate despite its overwhelming potential? Do a country's regime type, government capacity and the level of internal security matter?

As mentioned above, it is easy to answer the question what drives a country's capabilities. But it is much more complex to assess what influences the actual projection of power or what drives foreign policy. In the second main section of this paper the authors explored the governance profile of the Big Five on the basis of the hypothesis that governance could be a mediating variable when countries translate capabilities into power projection.

In the case of South Africa, it is evident that the transition from apartheid to constitutional democracy meant a successful reintegration into international affairs. This came with a rapid and sustained expansion of its diplomatic engagements. As Hengari writes, 'South Africa has assumed leadership roles in various international platforms – the UN, African Union (AU) and the G-20' and 'has used these avenues to advance Africa's voice and issues'.⁵⁷ However, South Africa's 'diplomatic actions have become less and less consistent with the core values that underwrite its foreign policy and constitution'.⁵⁸ South Africa has also significantly reduced its military expenditure and hence its hard-power capabilities. The remaining drivers, including the size of South Africa's economy and the size of its population are expected to stagnate too. Only a very determined foreign policy and credible leadership could make up for the associated deficit in (forecasted) capabilities. This is not currently evident.

Today, democratic South Africa is certainly more influential globally than its previous regime could have ever imagined. It is therefore questionable whether, in a context of stagnant or even declining capabilities and a lack of credible leadership, South Africa will be able to continue to punch above its weight in the medium-term future.

This seems to be possible for Ethiopia, though, a country with limited, albeit growing, capabilities but a coherent (or uncontested) foreign policy that might well be a by-product of its anocratic regime type. Although Ethiopia's foreign policy plays second fiddle to its domestic policies, security in the wider region can be considered as a domestic priority – and this has direct implications for internal stability, governance and development. A more democratic Ethiopia would certainly expand its diplomatic engagements, as defined in the third section of this paper, but whether it would therefore automatically project more power is debatable. The wildcard for Ethiopia seems to be its democratic deficit, which is expected to grow, with sustained progress made in economic and human development, but with simultaneous sluggish progress in terms of access to political systems. The way in which Ethiopian leaders manage that transition could have a significant impact on future power projection, since greater domestic accountability is most likely to limit external engagement.

Democratic Nigeria is often accused of being unable to project power because of a profound domestic governance deficit, which includes high levels of internal violent conflict. Its previous successive military governments found it easier to intervene in the neighbourhood (e.g. Sierra Leone and Liberia). The transition from authoritarian military leadership to one with greater accountability has clearly reduced Nigeria's ability to project power. In 2012 Nigeria's candidate for the AU Commission chair was trumped by South Africa's Nkosazana Dlamini-Zuma. And in 2009, in an election to the UN Security Council, Liberia, Sierra Leone and Togo did not vote for Nigeria.⁵⁹

With the possible exception of Nigeria, African countries will remain minor powers

Faced with both domestic and regional threats, Algeria remains focused on the need to maintain a large military capacity for internal purposes. Its complex domestic situation, including the threat of a large conservative Islamic community, limits its ability to undertake the transition to greater inclusiveness and openness required for the country to emerge from a political and economic situation controlled by elites. In many senses, Algeria is trapped between the Arab Spring and the rise of radical Islam, giving it very limited room for manoeuvre.

Egypt, on the other hand, is deeply connected internationally but struggling to cope with the aftermath of the Arab Spring as well as spill-over effects of the conflict in neighbouring Libya. Domestic challenges seem to be detracting from external power

projection, and in any case, external priorities evolve around the conflict in the Middle East where Egypt has traditionally played an important role and efforts to contain terrorism. Power projection within Africa is limited, and foreign policy under Sisi focuses on an uneasy relations with the United States (still Egypt's largest provider of military aid) whilst seeking support from Saudi Arabia and the United Arab Emirates.

Conclusion

The objective of this paper was to explore the changing nature of power in Africa, and more specifically the capabilities of Algeria, Egypt, Ethiopia, Nigeria and South Africa – the Big Five – to a time horizon of 2040. The authors argue in favour of a conceptualisation of power that goes beyond material capabilities, and takes into account general measures of technology as well as diplomatic networks and interaction capacity.

The emerging world order is characterised by a diffusion of power and a shift in the relative distribution of material power and influence from the West to the East, and a transition from unipolarity to multipolarity. The authors find that Africa will remain at the margins of power and influence globally, even by 2040, despite the sustained high levels of growth and an ongoing broad transformation on the continent over the period. With the possible exception of Nigeria, African countries will remain minor powers, with associated implications for their influence over issues of global governance. However, changes in the global distribution of power will at the very least affect Africa's capacity for power projection and informal and formal alliance building, both continentally and globally.

As for the Big Five, they will have a significant impact on whether the 'Africa rising' story materialises or not regardless of how they project power because of their demographic, economic and military size. This is despite these countries' diversity in terms of their development, governance and power trajectories. Each country is going through at least one significant transition in the political, economic, and/or social realm.

The findings are that Ethiopia and South Africa have largely punched above their weight – meaning that they are able to influence more international actors, institutions or regimes than would be expected on the basis of their capabilities. In addition, South Africa's current leadership role in Southern Africa could be contested by a rising Angola.

Algeria and Nigeria, on the other hand, punch below their weight, and Egypt punches above its weight internationally but below its weight in the African context. The trends for capabilities and power projection are summarised in Table 1.

Table 1: Current capability and trends for power projection among the Big Five

Country	Current capability	Future trend	Current power projection
Ethiopia	Low	↑	Above its weight
Nigeria	High	↑	Below its weight
South Africa	High	↓	Above its weight
Egypt	High	↓	Below its weight
Algeria	Modest	↓	Below its weight

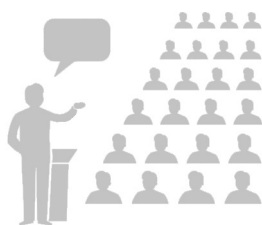
The power analysis and forecasts presented here point to a clear distinction between the status quo powers (Egypt, Algeria and South Africa) and the emerging African powers (Nigeria and Ethiopia). Ethiopia and Nigeria's stars are rising as far as capabilities are concerned, although Nigeria is the obvious frontrunner and Ethiopia is coming from a very low base. Ethiopia's rise is in line with its actual power projection and growing influence in the region. Under its former prime minister, the late Meles Zenawi, and the current administration of Prime Minister Hailemariam Desalegn, Ethiopia has successfully focused on internal stability and development. The main question is how Ethiopia will manage the inevitable transition to a more democratic and therefore more inclusive society, and whether this internal challenge will affect its external performance. Sustained economic growth is likely for Ethiopia and could accentuate the country's democratic deficit with unforeseen effects.

Nigeria is the only African country that has the potential to emerge as a globally significant player

Nigeria, on the other hand, is the only African country that in terms of capabilities has the potential to emerge as a globally significant player. However, it has been punching well below its weight. Despite being by far the largest economy in Africa, an advantage that will increase, successive Nigerian presidents have wrestled with internal instability, high levels of corruption and a political economy of violence. Nigeria has not managed to secure the transition to a sustained, inclusive political-economic system.

Some analysts refer to the 'inevitability of instability' in Nigeria. There is lack of strategic vision, including in the foreign-policy domain, recently aggravated by the growing threat Boko Haram poses to stability and security in the country. Without a solid domestic base, it is difficult for Nigeria to formulate a coherent foreign policy and project power in the region and beyond. Therefore, it is at least debatable whether Nigerian leadership can keep up with the country's development in terms of capabilities to translate raw mass into power projection and shape African, and even global, governance.

Since the advent of the country's democracy, South Africa, on the other hand, has been punching significantly above its weight in Africa and globally. Under former president Thabo Mbeki, South Africa prioritised external engagement over domestic development – a trend that has continued, although with less ideological focus, under President Zuma. That and the legacy of the remarkable settlement process, a developed economy by African standards and a benign global context (at least before the 2008/09 global recession) have made this possible.



IT IS AT LEAST DEBATABLE WHETHER NIGERIAN LEADERSHIP CAN KEEP UP WITH THE COUNTRY'S DEVELOPMENT IN TERMS OF CAPABILITIES TO TRANSLATE RAW MASS INTO POWER PROJECTION

However, given South Africa's decreasing capabilities, its inconsistencies with regard to its foreign policy as well as legitimacy problems it faces on the continent, the authors conclude that although the country will remain an important player it is likely that its influence in the affairs of other countries will wane. This is despite its significant advantage in terms of its membership of BRICS and the G20, and its strategic partnership with the EU.

Global measures of power, such as the HHMI, are useful to measure the capabilities of states and their power potential. However, they are not designed to measure actual power projection. More comparative research should be conducted to achieve a better understanding of the relationship between governance and domestic instability in particular and foreign-policy projection, especially at relatively low levels of capability, which is the case for much of Africa. In any case, it is important to acknowledge that power projection in Africa occurs in a context of ongoing processes of state consolidation and significant governance gaps, including fairly high levels of violent conflict.

In addition, this paper has not explicitly treated the various impacts of increased regional cooperation on the ability of Africa's states to project power. Increasing the density of connections within and across Regional Economic Communities could, in turn, change the ability of African states to influence the international system. This deepening of integration is a potential game-changer that should also be considered in future research.

In the case of Nigeria, it seems reasonable to argue that the governance deficit compromises its power projection but whether this is mainly attributable to high levels of internal violent conflict or the lack of state capacity and/or inclusiveness is difficult to evaluate without embarking on a more granular analysis.

Power distribution in Africa is likely to remain multipolar with various countries fulfilling the role of subregional leaders

On the other hand, Ethiopia seems to benefit in a sense from its lack of democracy under current circumstances when it comes to the formulation and implementation of a coherent foreign policy.

Egypt has historically punched above its weight internationally despite being an autocratic regime. This illustrates the indeterminate relationship between governance and power (or power projection). Currently, domestic challenges tied to

the aftermath of the Arab Spring as well as a troubled immediate neighbourhood additionally detract from external power projection.

The distribution of relative power in Africa is such that it is likely that various countries will continue to fulfill the role of subregional leaders. Only Nigeria has the potential to be a hegemonic leader in Africa with global significance. But, as mentioned already, such a development would require a comprehensive change in its current domestic stability, governance capacity and political leadership.

Annexure: The Hillebrand-Herman-Moyer Index

Forecasting the distribution of relative national power across time requires a platform that formally represents variables from a wide range of key development systems and interactions.

The HHMI is a modification and expansion of the Hillebrand-Herman Index (HHI), which was created by Evan Hillebrand and Paul Herman with support from Barry Hughes at the University of Denver. It has been used to inform the United States *National Intelligence Council's Global Trends 2025* and *Global Trends 2030* reports and other publications.⁶⁰

Table 2: HHMI variables and their percentage contribution to selected measures of historical power

Component	Share of total
Global share of military spending at MER	23%
Global share of nuclear weapons (logged)	6%
Global share of population	20%
Global share of GDP at PPP	28%
Global share of GDP at PPP times GDP per capita at PPP	8%
Global share of number of embassies held in other countries as a percent of total possible embassies	8%
Global share of IGO memberships weighted by importance (measured as mentions made of the IGO per year on the Foreign Broadcast Information Service and World News Connection) as a percent of total possible weighted memberships	5%
Global share of treaty signing and ratifications weighted by importance (measured by Hein Online legal database) as percent of total possible weighted participation	3%

Notes

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- 6 The full model is available at pardee.du.edu. IFs endogenises relationships across key development systems for 186 countries. It forecasts interconnected variables and parameters for the following systems: education, health, economy, demographics, agriculture, energy, environment, infrastructure, governance, international politics and technology. The 186 countries interact in the system through trade, foreign direct investment, foreign aid, diplomatic connections and threat of conflict. The Pardee Center and the Institute for Security Studies are partners in the African Futures Project – for more information, see www.issafrica.org/futures.
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- 8 For example C Layne, This time it's real: The end of unipolarity and the Pax Americana, *International Studies Quarterly*, 56:1, 2012, 203–213, doi:10.1111/j.1468-2478.2011.00704.x.
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- 10 Middle powers are defined as having more than 2% and less than 9% of global power.
- 11 See <https://globaltrends2030.files.wordpress.com/2012/11/global-trends-2030-november2012.pdf>, accessed 19 December 2014.
- 12 Similar issues arise with the EU, also represented in Figure 1, although its level of integration is obviously much higher, including in terms of foreign policy.
- 13 W Brown, A question of agency: Africa in international politics, *Third World Quarterly*, 33:10, 2012, 1.
- 14 As a collective international actor, often represented by the AU, as a collection of states with a shared history and as a discursive presence. See, for example, B Vickers, Africa and the rising powers: Bargaining for the 'marginalized many', *International Affairs*, 89:3, 2013, 674 and W Brown, A question of agency: Africa in international politics, *Third World Quarterly*, 33:10, 2012, 1–20.
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- 16 J Cilliers, B Hughes and J Moyer, African Futures 2050 – The next forty years, ISS monograph 175, January 2011, www.issafrica.org/publications/monographs/african-futures-2050.
- 17 East Africa consists of Burundi, Comoros, Djibouti, Eritrea, Ethiopia, Kenya, Madagascar, Mauritius, Rwanda, Seychelles, Somalia, Sudan, Tanzania and Uganda. West Africa consists of Benin, Burkina Faso, Cape Verde, Côte d'Ivoire, The Gambia, Ghana, Guinea, Guinea Bissau, Liberia, Mali, Niger, Nigeria, Senegal, Sierra Leone and Togo. Southern Africa consists of Angola, Botswana, Lesotho, Malawi, Mozambique, Namibia, South Africa, Swaziland, Zambia and Zimbabwe. Central Africa consists of Cameroon, Central African Republic, Chad, Congo, Democratic Republic of Congo, Equatorial Guinea, Gabon, and São Tomé and Príncipe. North Africa consists of Algeria, Egypt, Libya, Tunisia, the Islamic Republic of Mauritania and Morocco.
- 18 B Hughes et al, *Strengthening governance globally: Forecasting the next 50 years – Patterns of potential human progress* volume 5. Boulder: Paradigm Publishers, 2014.
- 19 See www.transparency.org/research, accessed 11 January 2015.
- 20 Dutch Disease refers to the apparent relationship between the increase in the economic development of natural resources and a concurrent decline in the manufacturing sector and/or agriculture.
- 21 See <http://en.wikipedia.org/wiki/Algeria> and http://en.wikipedia.org/wiki/Military_of_Algeria, accessed 8 January 2015.
- 22 Recent data shows how much the economy has diversified over the past decade, with services now contributing the biggest share. See Nigeria almost doubles GDP in recalculation, *Financial Times*, 7 April 2014, www.ft.com/intl/cms/s/0/70b594feb94-11e3-a5ba-00144feabdc0.html, accessed 20 August 2014.
- 23 South Africa is ranked at 67, Egypt at 94, Algeria at 100 and Ethiopia at 110. See www.transparency.org/cpi2014/regional_analysis, accessed 11 January 2015.
- 24 K Amuwo, Nigeria's continental diplomatic thrusts: The limits of Africa's nominally biggest economy, SAIIA Policy Briefing 111, October 2014.
- 25 J Cilliers, Africa's conflict burden in a global context, ISS Paper 273, 22 October 2013, www.issafrica.org/publications/papers/africas-conflict-burden-in-a-global-context; J Cilliers and S Hedden, Africa's current and future stability, ISS Paper 274, 20 November 2014, www.issafrica.org/publications/papers/africas-current-and-future-stability.
- 26 Armed Conflict Location & Event Data, Conflict Trends Report No. 33, January 2015, www.acleddata.com/research-and-publications/conflict-trends-reports/, accessed 3 February 2015.
- 27 Ibid.
- 28 Examples of these kind of imbalances are a democratic deficit, corruption overload, unacceptable inequality, middle-income trap, unemployed youth bulge, anocratic limbo, resource curse, horizontal inequality, gender inequality and debt overburden.

- 29 R Kuhn, On the role of human development in the Arab Spring, *Population and Development Review*, 38:4, 2012, 649–683, doi:10.1111/j.1728-4457.2012.00531.x.
- 30 Email correspondence from C Dowd with J Cilliers, 6 January 2015.
- 31 Email correspondence from C Dowd with J Schünemann, 21 October 2014.
- 32 Domestic security is not a capability and has an indeterminate relationship with the ability of states to project power from a macro, cross-national perspective. It could be treated as an intervening variable when it comes to translating capabilities in terms of states' potential to project power.
- 33 Historically, states have also engaged in wars that have been, at least partially, aimed at distracting attention from domestic problems, such as instability. More research should be directed at understanding the relationship between domestic instability and foreign-policy projection, especially at relatively low levels of capability endowment.
- 34 B Hughes et al, *Strengthening governance globally: Forecasting the next 50 years – Patterns of potential human progress* volume 5. Boulder: Paradigm Publishers, 2014, 8.
- 35 K Barkey and P Sunita, Comparative perspectives on the state, *Annual Review of Sociology*, 17, 1991, 523–524, in B Bukenya and P Yanguas, Building state capacity for inclusive development: The politics of public sector reform, ESID Working Paper No. 25, 2013, 6.
- 36 For the conceptual debate about conversion of capabilities by means of national processes, see GF Treverton and SG Jones, Measuring national power, Rand Corporation, 2005.
- 37 B Hughes et al, *Strengthening governance globally: Forecasting the next 50 years – Patterns of potential human progress*, volume 5. Boulder: Paradigm Publishers, 2014, 8.
- 38 Free flow of information, gender empowerment, freedom of association, extensive participation in political decision making and a cooperative culture of political behaviour are other examples of indicators measuring inclusion.
- 39 Mauritius (81.7), Cape Verde (76.6) and Botswana (76.2) are ahead of South Africa in this index.
- 40 The Polity IV Project codes authority characteristics of states in the world system for purposes of comparative, quantitative analysis. The Polity score captures this regime authority spectrum on a 21-point scale ranging from –10 (hereditary monarchy) to +10 (consolidated democracy). The Polity scores can also be converted into regime categories in a suggested three-part categorisation of autocracies (–10 to –6), anocracies (–5 to +5), and democracies (+6 to +10). See also www.systemicpeace.org/polityproject.html, accessed 15 January 2015. The 2014 scores for the Big Five are Egypt –4; Ethiopia –3; Algeria 2; Nigeria 4; South Africa 9.
- 41 See also www.systemicpeace.org/polity/polity4.htm, accessed 15 January 2015.
- 42 M Maru, Ethiopia's regional diplomacies: A dominant interpretation of the Horn of Africa, SAIIA Policy Briefing 112, October 2014, 2.
- 43 Based on IFs, which relies on the UN Development Programme Gender Empowerment Measure to measure inclusion. This measure is based on estimates of women's relative economic income, participations in high-paying positions with economic power, and access to professional and parliamentary positions.
- 44 Angola is forecast to have a 2040 economy with a size of \$1 020 billion, making it the third largest African economy.
- 45 The data series that captures these elements was created by the Pardee Center for International Futures as part of its Diplometrics project. See pardee.du.edu/diplometrics.
- 46 Of the three subcategories included in the relative measure of diplomatic connections, embassies are weighted most heavily, followed by membership in international organisations and, lastly, treaties. Embassies are weighted three times more heavily than treaties, and membership of international organisations twice as heavily as treaties.
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- 48 Ethiopia, Ministry of Information, *Foreign Affairs and National Security Policy and Strategy*, 2002, 28–30, cited in M Maru, Ethiopia's regional diplomacies: A dominant interpretation of the Horn of Africa, SAIIA Policy Briefing 112, October 2014, 2.
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- 51 See J Cilliers, The 2014 South African Defence Review: Rebuilding after years of abuse, neglect and decay, ISS Policy Brief 56, 25 June 2014, www.issafrica.org/publications/policy-brief/the-2014-south-african-defence-review-rebuilding-after-years-of-abuse-neglect-and-decay.
- 52 *Ibid.*, 5.
- 53 This provides a proxy for economic-technological development by combining technological advancement (i.e. higher levels of GDP per capita at PPP) with overall size of national economic output (GDP at MER).
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- 58 *Ibid.*
- 59 A Wo, Nigeria: State weakness and foreign policy, *NJIS*, 38: 1 2, December 2013, 132, 137–138, cited in K Amuwo, Nigeria's continental diplomatic thrusts: The limits of Africa's nominally biggest economy, SAIIA Policy Briefing 111, October 2014, 3.
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About the African Futures Project

The African Futures Project is a collaboration between the Institute for Security Studies (ISS) and the Frederick S. Pardee Center for International Futures at the Josef Korbel School of International Studies, University of Denver. The African Futures Project uses the International Futures (IFs) model to produce forward-looking, policy-relevant analysis based on exploration of possible trajectories for human development, economic growth and socio-political change in Africa under varying policy environments over the next four decades.

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