

African emerging powers

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■ Executive summary

Once considered almost solely a site of poverty and conflict, sub-Saharan Africa and perceptions of it have gradually been changing. Today, African states have become important actors in international affairs, with a number considered as emerging powers. The subcontinent's most assertive players have been capitalising on their natural wealth and recent economic growth and have implemented policies pursuant to a change of status from developing countries to emerging powers. This report looks at four such sub-Saharan countries – South Africa, Nigeria, Angola and Kenya – and explores the reasons for both optimism and pessimism regarding their considerable potential, as well as their governments' initiatives to fulfil it.

Introduction

The world has recently reached the conclusion that a continent with 20% of the world's land mass, vast mineral wealth and biodiversity, and over 800 million people can no longer be ignored. Once considered almost solely a site of poverty and conflict, sub-Saharan Africa and perceptions of it have gradually been changing. Today, African states are viewed as "more important than ever to the security and prosperity of the international community" (White House, 2012). Perceived as a major source of great natural and mineral wealth and a partner for the much-sought diversification of suppliers to foster global economic growth, the subcontinent's current production and exports, as well as its prospects for untapped reserves, make it particularly attractive to both established and aspiring major international actors such as the U.S., the European Union, China, Russia and Brazil.

Yet sub-Saharan Africa is not only sought by the world's major powers, but appears also to be producing some of its own emerging powers. The subcontinent's most assertive players have been capitalising on their natural wealth and recent economic growth, and are pursuing a change of status from developing countries to emerging powers. In this report we look at four such sub-Saharan countries – South Africa, Nigeria, Angola and Kenya – and explore the reasons for both optimism and pessimism regarding their considerable potential, as well as their governments' initiatives to fulfil it.

South Africa as an emerging power

South Africa's position on the African continent and in international affairs has undergone a significant transformation in the last 20 years. From international pariah during the days of apartheid, it has become the model for how democracy, diplomacy, and reconciliation can be legitimate alternatives to civil conflict and result in prosperity. As such, South Africa's position on the international stage is relatively high, despite recent reports that claim the country is in decline (*The Economist*, 2012a).

Indeed, South Africa faces many challenges internally, including a growing economic inequality that is largely demarcated along racial lines. Challenges persist regarding service delivery, housing, and primary and secondary education. Protests and strikes often reach the headlines in the international press, leading many to believe that the country is in consistent deadlock or economic paralysis. The tripartite alliance comprising the African National Congress (ANC), the South African Communist Party and the Congress of South African Trade Unions labour federation has resulted in the emergence of a de facto one-party state that many believe is arrogant, corrupt and disconnected from the realities facing the majority of South Africans.

All of these challenges are real and present, pose serious questions about the direction of South Africa, and deserve interrogation. Notwithstanding, South Africa continues to be a regional leader in many respects economically, in regional governance institutions on the African continent, and democratically. Also, South Africa is often included in

multilateral decision-making such as the G20, the BRICS grouping (Brazil, Russia, India, China and South Africa), the United Nations (UN) Security Council, and climate change negotiations.

South Africa's economic relevance

South Africa continues to be an important economy in Africa and is one of three regional trading hubs on the continent (alongside Nigeria and Kenya). South Africa's gross domestic product (GDP) in 2012 was \$384 billion and grew a modest 2.5% (World Bank, 2013a). While this is a slowdown compared to previous years, it still represents continued growth during a period of global economic uncertainty. This slower rate of growth is compared to the 6-7% annual rate experience from 1993 to 2008 (Nedbank Group, 2011), while Nigeria posted a 7.63% growth rate in 2013 (World Bank, 2013b). But even with these smaller numbers, South Africa still has enormous economic potential that is primarily rooted in a strong natural resource base of high-value minerals like gold and platinum. That said, labour strife and international market prices pose challenges to realising the potential existing in this area.

From an infrastructure perspective, Draper and Scholvin (2012) highlight how South Africa is an important centre acting as a hub for company headquarters, logistics and distribution; sourcing for regional markets; and finances. While they also note that the country is in danger of losing this advantage if strategic investment does not take place, it should not be forgotten that South Africa as a place to do business is ranked 41st globally (Nigeria is ranked 131st) and its GDP accounts for approximately 30% of the African continent's GDP. Its industrial output is 40% and mineral output 45% of the continent's total output, and it generates over 50% of Africa's electricity (South Africa, 2011). South Africa is also an important investor providing over \$18.8 billion in foreign direct investment in 2010 (UNCTAD, 2011).

South Africa as a democratic leader

South Africa maintains strong democratic institutions, including a progressive constitution that enshrines political and socioeconomic rights, and provides for checks and balances on the power of the government (Misra-Dexter & February, 2010). The electoral system, judiciary, civil society, and press are also important actors in South Africa and provide a space for dissent and challenge to government despite the ANC's strong parliamentary majority. In particular, civil society and the media in South Africa remain strong and influential in the politics of the country, effecting change through widespread mobilisation and use of the rule of law. This is best characterised in the opposition to the Protection of State Information Bill (the so-called Secrecy Bill), which has received extensive criticism for curtailing transparency and free speech. Such activism has resulted in important changes to the legislation that many consider not sufficient; a Constitutional Court challenge to it is being prepared (Nkosi, 2011; Right2Know, 2012).

Stories of corruption and nepotism appear to be rising in South Africa and suggest a concerning trend. Indeed, in 2012 South Africa ranked seventh in the region for corruption and 69th globally, while perceived continental competitors like Nigeria rank 39th regionally and 143rd internationally on the Transparency International Corruption Perceptions Index (Transparency International, 2012). Civil society and the media are taking a leadership role in ensuring that corruption and nepotism do not go unnoticed and are using the courts to this effect. Within the ANC commitments have been made to stem corruption, e.g. with the proposal to establish an integrity commissioner with widespread powers to dismiss public servants engaged in corrupt behaviour.

All this suggests that while corruption and nepotism challenge the democratic advances made since 1994 in South Africa, the country still is viewed as a democratic leader in the continent and is engaged in promoting good governance on the continent.

For example, South Africa often plays a leadership role in continental governance frameworks and represents Africa on the international stage. It is the only African state to be part of the BRICS group; has just finished its second consecutive term on the UN Security Council; has played a central role in recent International Panel on Climate Change negotiations; has played a similar role in the design of the African Peace and Security Architecture; and holds leadership positions in the South African Development Community (SADC), the African Union (AU) and the New Partnership for Africa's Development (NEPAD).

In BRICS, South Africa is viewed as the "junior" partner, given its economic size. However, the country's influence in African politics justifies its presence and role in this group of emerging powers. Indeed, South Africa has been integral in conceptualising a BRICS development bank and played a leadership role in crafting the BRICS response to the Syrian crisis, which has spoken out against Western military intervention while encouraging a peaceful resolution to the civil conflict.

In terms of regional security, South Africa espouses a rhetoric of human security and the right to protect, but in practice struggles with the idea of military intervention (Aboagye, 2012). This is in part due to the costs of armed intervention and peacekeeping, but also out of sensitivity to historical legacies (Flemes, 2009). Indeed, the South African Defence Force (SADF) is currently underfunded and in need of equipment renewal. This makes it difficult from a practical perspective to engage in any military operations, but there is also a public aversion in South Africa to engaging in external conflicts. This was recently embodied in the public outcry against the SADF presence in the Central African Republic, where 14 South African soldiers were killed. Such reluctance to intervene has elicited frustrated responses among the international community, but it does appear that South Africa's willingness to engage

in regional conflicts is changing, despite the challenges mentioned above. The country is part of the UN peacekeeping force in the Democratic Republic of the Congo (DRC) that is actively engaging and fighting the M23 rebels, has been active in mediating the ongoing crises in Zimbabwe and Sudan, fought (unsuccessfully) against the Seleka rebels in the Central African Republic, and has committed to help fund an AU rapid reaction force.

South Africa into the future

The relevance of South Africa on the continent appears to be integral and its role one of leadership. Despite internal pessimism from the press and business analysts, successive South African leaders from Mandela to Mbeki and Zuma have taken a long-term and strategic view of the country's role on the international stage. This has involved a real political commitment to undertaking liberal macro-economic reforms that position South Africa as an important market for foreign investors and make it integral to the region. As a state, it is often taken as an example of a successful democracy and economy in a region better known for its instability and civil conflict. Finally, South Africa continues to take on leadership positions in both continental and international governance frameworks and often represents African views in these forums. This suggests a level of influence unparalleled by any other African nation. As such, any attempt to engage Africa or understand its politics should take heed of the influence of the "Rainbow Nation".

Nigeria as an emerging power

Ever since its independence in 1960 Nigeria has been perceived as having the potential to lead the African continent. While the various Nigerian governments have always incorporated this aspiration into both their internal and foreign policies in a clear attempt to assume the economic, political and military leadership of Africa, this has not always been matched by successful results, but rather by "ups and downs" in its capacity to actually play a strong leadership role. Furthermore, Nigeria is confronted with deep and complex internal conflicts (such as the Niger Delta conflict and the problems in the north with Boko Haram) and generalised violence resulting from systematic and overlapping patterns of inequality in the country, which also contribute to questioning Nigeria's capacity to assume a leadership role in the continent.

Nigeria's economic potential

The economic dimension of the "emerging power" label is probably the most clearly identifiable in the case of Nigeria. In fact, Nigerian oil riches have constituted a fundamental and structuring element of its foreign policy at the regional and international levels and are part of the debate around its potential to be considered as an emerging power. With an average growth of about 7% for most of the last decade, Nigeria is predicted to have the highest average GDP growth in the world over the next 40 years.. In fact, last

April Nigeria recalculated its GDP in a total of \$509.9bn (by including previously uncounted industries like telecoms, information technology, online sales, airlines, among others) and has thus become Africa's largest economy overtaking South Africa (BBC, 2014).

Nigeria is the most populated country in sub-Saharan Africa, with around 167 million inhabitants (this population is young and fast growing), the second-largest economy in sub-Saharan Africa (after South Africa) (ADB, 2013), the largest oil producer in Africa, and one of the largest oil exporters in the world (OPEC, 2013). Nigeria also holds the largest natural gas reserves in Africa, but has limited infrastructure in place to develop this sector (World Bank, 2013b).

It is also considered one of the continent's largest (potential) consumer markets with a significant and increasing middle class, while the country is also characterised by an important entrepreneurial dynamic that helps create the conditions for an increasing economic role in Africa and beyond (Ford, 2012). Nigeria's huge economic potential is mostly supported by an important and promising agriculture sector, and huge natural gas and oil reserves, with an estimated 180 trillion cubic feet of proven natural gas reserves at the end of 2011, giving it the ninth-largest reserves in the world and the largest in Africa (Business Monitor International, 2014). Nigeria is also considered one of the so-called "next-eleven" emerging powers (Goldman Sachs, 2007a; 2007b), which also include countries like Egypt, Indonesia, Turkey and South Korea, clearly challenging the exclusivity of the BRICS as internationally recognised emerging powers. This is all matched by the assumed desire of the Nigerian government to be among the top 20 economies in the world by 2020 (Garuba, 2008).

Nigeria's political affirmation

We can clearly identify regional and international moves by the various Nigerian governments, in particular the most recent ones, to affirm Nigeria's role in Africa as a "responsible and influential diplomatic and military player in peace and security in West Africa and beyond" (Ford, 2012). In political and security terms, Nigeria has assumed a sense of regional responsibility by using multilateral forums such as the UN or the AU to attain its objectives, namely through participation in international peace missions in Liberia (ECOMOG, 1990-99; UNMIL, 2003), Sierra Leone (ECOMOG, 1996-99; UNAMSIL, 1999-2003), Sudan (2005) and Darfur (2007). In this area Nigerian policy has mainly focused on *soft power*, including conflict mediation, conflict resolution, economic integration, and development promotion in the continent aimed at creating and consolidating a peace architecture in Africa that has been referred to as the "Pax Nigeriana" (Adebajo, 2010; Adebajo & Mustapha, 2008; Nuamah, 2003; Pham, 2007: 14). This approach has included active participation in efforts and projects at the level of regional organisations like the Economic Community of West African States, NEPAD and

the AU, but also financial contributions to the African Development Bank through the establishment of the Nigerian Trust Fund¹ to support the development of regional neighbours (Inamete, 2001: 89-90). The aim has clearly been to simultaneously stabilise the region and affirm Nigeria economically and politically, both regionally and internationally.

With the democratic transition and after decades of military and oppressive regimes, Nigeria has clearly attempted to reaffirm its regional image as the “natural” African leader (Osaghae, 1998) and to project itself internationally. Ultimately, the idea of leadership in the continent is more present at the regional level. Not only does the Nigerian population believe that “their country is a ‘super-power’ ... [and] that with a better leadership Nigeria can actually become the ‘lighthouse’ to Africa” (Guest, 2000), but also internationally Nigeria is recognised as the “the African equivalent to Brazil, India or Indonesia” (Maier, 2000).

Nigeria into the future: “a giant with feet of clay”?

In the past few years Nigeria’s leadership potential has been decreasing due to the increasing affirmation of a democratic and multiracial South Africa, which emerges with a strong economy and a much more favourable position to claim African leadership when compared to a country confronted with internal instability and increasing accusations of government corruption. The clientelist, patrimonialist and corrupt relations that characterise the country sustain Nigeria’s political economy, involving some of the main foreign investment actors and creating an increasingly richer and powerful elite who take the country’s strategic decisions. The creation of an “enclave economy” around oil exploitation aggravates the internal imbalances, feeding dynamics of violence and instability that negatively affect both Nigeria’s relation with its oil partners (e.g. in the Niger Delta) and its capacity to project itself internationally (Nuamah, 2003; Alao, 2011). This is why Nigeria has also often been referred to as “a giant with feet of clay” or the “crippled giant” (Osaghae, 2008), mostly characterised by a fragile economic, political and social internal structure that has not permitted the realisation of its role as Africa’s leader and a true emerging power.

Among the most significant internal challenges that Nigeria has to address are those related to the much-needed consolidation of democracy and good governance, including fighting corruption in governmental structures; a more equitable distribution of the national wealth and resources mainly derived from oil production and exports; and more active and efficient conflict resolution mechanisms to attain the necessary internal stability to allow it to become a world power, the continent’s leader, and an example for the promotion of South-South interests and development.

Angola as an emerging power

Following an almost continuous state of war for 40 years, ranging from the anti-colonial struggle to a fierce civil armed conflict, Angola’s rapid rehabilitation has placed it under the spotlight. In ten years its economy became one of the fastest growing in the world, managing to triple its GDP and intending to double it between 2014 and 2024 (IFE, 2013). Its vast natural resource wealth has guaranteed Angola privileged relations with most of the world’s powers, both traditional and emerging. Optimism has spread externally and internally, with an ambitious government taking the opportunity to redefine the country’s role in world affairs. The first steps towards placing Angola on the first rungs of the emerging powers ladder have been taken. Whether this leads to consolidation or disappointment remains to be seen.

Angola’s economic potential

As with other so-called emerging powers, the primary reason why Angola has attracted attention is its double-digit annual economic growth until 2008 (reaching 23% in 2007). This figure is currently lower – 7% in 2012 – but still higher than many developed economies. Inflation was slashed from 108.9% in 2002 to 10.3% in 2012. Based on its GDP – \$114 billion in 2012 – the country has the third-largest economy in sub-Saharan Africa after South Africa and Nigeria (World Bank, 2013c).

The motor of this booming economy is undoubtedly the oil sector. This Southern African country is the second-largest oil producer in sub-Saharan Africa after Nigeria and the 18th-largest in the world (OPEC, 2013). Oil exports have guaranteed a stable source of revenue to rebuild the country’s infrastructure after the civil war and have also facilitated the growth of a business class that invests both domestically and abroad, and a rising banking sector. Untapped reserves and the current construction of oil pipelines bode well for Angola’s relevance in the oil market of the future.

Angola has one of the world’s largest gas reserves and the second-largest in sub-Saharan Africa after Nigeria (EIA, 2013), and is also one of the world’s largest diamond producers (Endiama, 2013). Its immense natural resource wealth also includes gold, bauxite, uranium, phosphates, copper and tropical timber. Its agriculture, severely hit by the civil war, has been recovering since 2002 and has great potential.

There are, however, considerable constraints to this optimism. While current strong demand and oil prices provide favourable prospects for oil producers, the country’s heavy reliance on this commodity as the main driver of its economy is in itself a significant source of fragility that exposes it to major external shocks. The levels of corruption have also kept significant business that could help diversify the economy away from the country. The country

1 The Nigeria Trust Fund was created in 1976 by an agreement between the African Development Bank Group and the Nigerian government (ADB Group, 2014).

is ranked 157th out of 176 in the 2012 Transparency International (2012) Corruption Perceptions Index and 179th out of 189 in the latest World Bank's Doing Business rankings (World Bank, 2013d). Most importantly, the country remains one of the poorest in the world, with 36.6% of the population still living under the poverty line (World Bank, 2013c), revealing significant challenges that have yet to be met.

Angola's governance and leadership

The Angolan regime is a fairly stable one. President José Eduardo dos Santos has been in power since 1979 and his party, the Movimento Popular de Libertação de Angola (MPLA), since independence. The government is run by a rather cohesive political and economic elite that makes use of neopatrimonial practices to guarantee the loyalty of its constituencies and to secure the party's hegemonic grip on power.

So far, the MPLA government has navigated the world of electoral politics – with a new constitution approved in 2010 and general elections in 2012 – without really allowing substantial democratic changes. The party remains in complete control of the various echelons of power, from which its largest competitor, the União Nacional para a Independência Total de Angola (UNITA), has been excluded, and continues to restrain citizens' participation in governance.

In the past few years several relatively small and peaceful demonstrations organised by both civil society movements and UNITA have taken place in an attempt to contest what they perceive as the authoritarian and repressive MPLA regime. So far, the government has cracked down on demonstrators – which won it severe criticism from international and national civil society organisations – but the potential for a more widespread contestation of the regime remains. Moreover, the presence of a secessionist claim in the oil-rich province of Cabinda, though seemingly under control, questions the country's stability into the future.

The government has, nevertheless, been making rather assertive moves in its quest for regional and international recognition as a major player. A legacy of war, Angola's armed forces are among the largest in Africa, with around 115,000 soldiers (Weimer, 2012). Luanda has put them to use in the context of the DRC's two civil wars in the 1990s, but more recently has moved to displaying diplomatic acumen in supporting the continuing peace process in that country and its neighbours. Angola is increasingly involved in NEPAD and SADC, and has played a relevant role in the crises in Guinea-Bissau and the Ivory Coast in 2011-12. Angola is unquestionably one of the heavyweights in the Community of Portuguese-speaking Countries and is pressing for an increase of the organisation's institutional reach and instrumentalising this space in terms of its own interests of pursuing a greater role in world affairs – as illustrated by the country's bids for positions in the UN

system. The country has, however, been sending mixed signals regarding regional integration with its neighbours: while investing in transport infrastructure to facilitate connections with other African countries, it has also been fearful of the opening of its borders to duty-free trade with the rest of the continent.

Angola into the future

The stakes are high for “the world's richest poor country” (Kampfner, 2008). Interactions with the outside world have been fostered and diversified, and Luanda's diplomatic acumen appears to be flourishing, mainly at the continental level. The stability that the government maintains, notwithstanding its democratic challenges, appears so far to have instilled the necessary confidence among the international community for investment and partnerships to grow.

Yet, despite substantial progress and even greater potential, various challenges remain, e.g. in terms of human development, inequality and poverty, economic diversification, productivity and infrastructure, institutional capacity, public management, and transparency. These massive challenges appear to be at the forefront of the government's strategy for the next ten years and could make or break this African country's ambitions to play a greater role in world affairs.

Kenya as an emerging power

Strategically placed in East and Central Africa, Kenya is bordered by Somalia, Ethiopia, South Sudan, Uganda, Tanzania and the Indian Ocean, on which it has a major port in Mombassa. It has been politically stable since it gained its independence in 1963, notwithstanding regular outbreaks of violence during electoral periods, of which the unprecedented level of violence of late 2007 and early 2008, when the country nearly tipped into civil war, is the most extreme example.

The most recent presidential elections – in March 2013 – led to a peaceful power transition and were praised as an example of African democracy in action (Ngenge, 2013). The peaceful victory of the Jubilee Alliance recovered Kenya's lost image of a multiparty, democratic country, as well as its enormous potential as an investment destination and key regional player. Political stability optimised the already ongoing economic and military strengths Kenya has been developing in the last decade.

A legislative agenda is now on the table to bring unity to the country and tackle Kenya's economic and social problems through the creation of jobs via technological advancement, the reduction of debt, and improvements to the quality of education (free laptops have been promised to students) and health care (e.g. the provision of free maternal health care in public health facilities) (Apollo, 2013). The renewal of political leadership was also a keystone of the Jubilee Alliance campaign to open a window of opportunity to

tackle corruption, but it is yet to be seen what changes a new cabinet can bring, particularly one whose key members (the president and vice-president) face prosecution at the International Criminal Court for their role in the violence in the previous election. It is also important to highlight the importance of Kenya Vision 2030 – an ongoing country development programme launched by former president Kibachi in 2008 that aims to transform Kenya into a “newly industrializing, middle-income country” and provide “a high quality of life to all its citizens ... in a clean and secure environment” (Kenya, 2008) by means of inclusive and participatory social, political, and economic policies.

Economic prowess and technological expertise

Kenya has an educated and skilled populace and abundant natural resources (limestone, soda ash, gemstones, zinc, diatomite, gypsum, hydropower and geopower, where it was a regional pioneer), while its GDP has been growing since 2002 (World Bank, 2012). The country’s membership of the East African Community (with Tanzania and Uganda) and the Common Market for Eastern and Southern Africa makes it an attractive base for foreign investors and companies looking to access the East and Central African market. As part of its efforts to increase Kenya’s competitiveness as an investment destination and to make the country a communications hub for regional business and commerce, the government has also embarked on a programme to rebuild the country’s crumbling infrastructure and has supported technological investments in order to modernise the country. Reinforcing this economic potential, Kenya is also presented as a strong financial force in the East African region – it has 43 commercial banks, one mortgage finance company, six deposit-taking microfinance institutions, three representative offices of foreign banks, 121 foreign exchange bureaus and two credit reference bureaus (Africa and the World, 2013). It is also the technological hub of Africa, clearly surpassing South Africa. Kenya has also enacted a campaign to become a global green energy power, especially in the geothermal sector, where it is a regional leader.² In 2011 it signed deals that would see the opening of at least three geothermal plants. Kenya expects to make up a third of the 15,000 megawatts of power the country will produce to meet increasing requirement as part of its Geothermal Vision strategic plan for 2030 (Blombaum, 2012). However, corruption is still pervasive in Kenya: it ranks 139th of the 176 countries on the Corruption Perceptions Index (Transparency International, 2012). According to UNICEF (2013), 46% of the population live in poverty, while 40% were unemployed in 2011 (CIA, 2011).

Technology could be worth more than a billion dollars to the country in the next three years and Kenya is already building a multibillion-dollar high-tech development in the form of a “Techno City”.³ Four factors helped Nairobi to

become this uncontested African technological hub. The first has already been mentioned – it has a supportive government. The second is the extraordinary success of Kenya’s mobile payments system, M-Pesa, created in 2007, which allows users with a national ID card or passport to deposit, withdraw, and transfer money easily using a mobile device, benefitting small and micro businesses immensely (Mbogo, 2010) and giving Kenya an extra competitive edge over its African counterparts in terms of the efficiency and productivity of its business sector, a significant reduction in transaction costs, and increasing household ability to spread risk and gain protection from negative economic shocks (*The Economist*, 2012b). The third is the creation of Ushahidi – a platform that works both for crowd-sourcing information and the collection of testimonies of illegal activities such as corruption, hate speech and incitement or electoral violence, which has been “exported” to other parts of the world like the DRC, Mexico, the U.S., Gaza and India. The fourth is the establishment of the iHub, an organisation that includes “a consulting arm, a research department and an incubation space called m:lab, which supports start-ups developing mobile applications” (*The Economist*, 2012b).

Diplomatic acumen and military force

Although many Kenyan citizens are wary of the country becoming involved in foreign ventures, Kenya has been testing out both its military capabilities and international mediation prowess. In October 2011 it began a full-scale military operation to remove the Islamic Somali-based group al-Shabaab not only from its own territory, but also from neighbouring Somalia, into which it has sent troops, justifying the intervention as a necessary war against terrorism and piracy. The recent al-Shabaab attack on the Westgate shopping mall in Nairobi and Kenya’s strike back by bombing al-Shabaab strongholds in Somalia make this issue central to the country’s security and stability. Also, President Kenyatta said he would not withdraw Kenyan troops from the AU peacekeeping force in Somalia and has made efforts to mediate tensions between Somalia and Sudan.

The country’s foreign policies, both regional and international, are also clear evidence of Kenya’s move to fulfil its potential and become a true regional power. Following in the footsteps of his predecessor, Mwai Kibaki, President Uhuru Kenyatta is recalibrating Kenya’s foreign policy to reflect an assertive new Africa-centred approach as the core of Nairobi’s regional and global policy. During his inauguration (*New Vision*, 2013) – to which Beijing and Delhi sent high-powered delegations – he signalled a search for a foreign-policy orientation anchored in subregionalism and pan-Africanism. Specifically, he intends to strengthen Kenya’s ties with the EAC member states – Uganda, Tanzania, Rwanda and Burundi – as well as South Sudan, Ethiopia and Somalia, which are likely to become EAC

² The opening of three geothermal plants is expected to increase the country’s geothermal capacity to 514 megawatts in 2014 (Blombaum, 2012).

³ See the official website: <<http://www.konzacity.co.ke/about-konza/>>.

members in the near future – and with new economic centres, mainly the BRICS states. The reason for this non-Western foreign policy focus is opposition to the International Criminal Court, which is attempting to try the country's president and vice-president for allegedly inciting the 2007-08 post-election violence in Kenya.

It is also important to recognise that Nairobi is home to a wide range of international organisations' regional headquarters, including the UN, FAO, UNHCR, UNESCO and UNDP, making it an institutional hub for the entire Horn of Africa region (Blombaum, 2012).

Kenya into the future

Kenya displays both innovation and drawbacks in equal measure in terms of its potential for achieving emerging power status. Despite the clear positive and promising points discussed above, Kenya still faces many additional pressing challenges, including severe crime, pervasive corruption, high unemployment and extreme poverty. Additionally, the country regularly faces both internal and external terrorist attacks, as well as evolving radicalisation dynamics in the east coast. Also, its 2008 elections were marred by ethnic violence, and it has been suffering the effects of the global financial crisis in part due to remittance payments dropping from Kenyans living abroad. These are difficult issues that need to be effectively tackled; if they are not, Kenya's rise to emerging power status might be doomed to failure. Soft power rather than hard power best fits Kenya's emerging strategy and tools. It is, therefore, more likely that the country's path to emerging power status will be a medium- to long-term one.

Conclusion

The preceding case studies have highlighted the potential of four sub-Saharan African states that exhibit characteristics of emerging powers. Indeed, each is considered a potential "leader" on the African continent, particularly in economic terms, with all of them overtly taking advantage of their natural resources and wealth to foster growth. Furthermore, South Africa, Nigeria, Angola and Kenya have all revised their foreign policies at both the regional and international levels in order to match this perceived rising profile and, in doing so, have consolidated their status as regional powers.

Yet, despite these countries' enormous economic and political potential, their potential emerging power status is limited by significant internal and external challenges. Careful attention needs to be given to how these will be addressed in the next few years, in particular through the establishment and consolidation of democratic institutions, because such challenges could outweigh or undercut current opportunities. These countries' reliance on natural resources, and hence their vulnerability to external shocks, appears to be a common problem that they are more or less successfully attempting to address.

As these four sub-Saharan states continue to develop, their desire to exert greater influence in regional and international affairs will also grow. This is likely to increase tensions among them when their foreign policies collide, because they are competing continental powers often with conflicting interests. Greater cooperation among them is hence desirable to achieve a more stable balance of power and ultimately promote the subcontinent's more favourable integration into the world system.

In moving forward, it will be important that support for the development of leadership capacities in these countries is prioritised, together with increased internal stability and regional cooperation. This will not only potentially spill over to other African nations, resulting in collective gains, but will ultimately sustain these four countries' emerging trajectory in world affairs.

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