

Not Imperial Vision but Sovereign and United Ethiopia

Reading The Economist and Horn Review Against the Four Singular Interests

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ATTENTION ! : The Man is the Wrong Subject

On the eve of the 1 June 2026 election, two publishers dropped appraisals of Prime Minister Abiy Ahmed within a day of one another. *The Economist* published a leader and a companion feature describing an *imperial vision*: a grandiose, centralising executive who has hollowed out competitive politics at home, favours his own ethnic stock, and dreams of restoring Ethiopia as a Red Sea hegemon at the risk of regional war [1, 2]. *Horn Review*, a research platform closely identified with the governing project, published a companion thesis describing a *strategically managed rupture*: a state inherited in structural exhaustion and reconstituted on a “new, irreversible trajectory,” an election whose legitimacy derives “from its function... not from predictability of outcome” [4]. The two readings are mirror images, and they share a defect. Each makes *the man* the subject of the argument—villain in one telling, founder in the other—and in doing so each evades the only subject that determines what any Ethiopian executive can or cannot do: the architecture of the state itself. This article advances a third reading. The correct yardstick is neither Abiy’s ambition nor Abiy’s achievement, but the **four singular interests**: *Unity and Red Sea Sovereignty* as the constitutive foundations of the Ethiopian state; *broad-based economic development anchored in democracy* as the sustaining means; and the *Grand Ethiopian Renaissance Dam* as the engine that makes the means feasible—Foundations → Means → Engine, none severable from the others. Measured against that architecture, *The Economist*’s “imperial vision” mistakes a *defensive* sovereignty interest for an *expansionist* one, and judges a leader by the competitiveness of an election while ignoring the constitution that makes competitive civic politics structurally impossible. *Horn Review*, for its part, launders centralisation as reconstitution, converts an uncontested contest into a virtue, and speaks of a “civic conception of statehood” without ever admitting that the 1995 constitution makes civic statehood unconstitutional at its foundation. Both, in their different registers, obscure the binding constraint and thereby narrow the reforms Abiy could attempt. The constitution is the building; the election is the capstone; and *it is the constitution, stupid*. Abiy Ahmed is imperfect, as every consequential leader has been imperfect. But he is, at this moment and in the public eye, the figure most plausibly able to carry the architecture through—if, and only if, he earns not merely an electoral mandate but the harder thing: the collective consensus of a law-abiding, hard-working citizenry. That consensus, not a palace and not a slogan, is what a sovereign and united Ethiopia is made of.

1 Two Portraits, and the Subject They Both Miss

I write as a nationalist, but not as a partisan, and the distinction is the whole of my method. Across a sequence of articles that began with *The Spirit of Adwa Must Carry Ethiopia Through GERD and the Red Sea* [5] and continued through the Abraham Accords sequels [6, 7, 8, 9], the June 2026 election essay [10], and the constitutional-anchor argument [11], I have tried to hold to a single discipline: to judge the Ethiopian moment not by the personality of whoever occupies the Prime Minister’s office, but by whether the four interests on which the nation’s existence depends are being defended or deferred. That discipline is unfashionable. The Ethiopian conversation, at home and in the diaspora, is conducted overwhelmingly in the register of the man—whether one is for Abiy or against him, whether he is saint or tyrant, reformer or ethnic entrepreneur. A country with Ethiopia’s inheritance—an old empire, a revolution, recurrent

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famine, a federation organised on ethnic lines, deep religious traditions, and memories of grievance that run back generations—does not reduce to the storyline the foreign press finds readiest to hand: the reformer who hardens into the strongman, the laureate who curdles into the danger. That arc is satisfying to write and easy to follow, but it is a portrait of a man imposed on the history of a state, and the fit is poor. It also forces a single verdict where the evidence supports two at once. A country can be advancing and unravelling in the same season—building roads and institutions while losing lives to war, opening an economy while hollowing a middle class—and an account that can hold only the ascent or only the collapse, but not both at the same time, has not yet described the place it claims to judge. Two recent and prominent pieces, arriving on the eve of the election, illustrate the register at its most sophisticated, and between them they bracket almost the entire respectable spectrum of opinion. They deserve to be read carefully, because each is intelligent, each is partly right, and each, in being partly right, conceals the part that matters most.

The first is *The Economist*'s, which framed its election-eve coverage around the idea of an *imperial vision* [1, 2]. In this telling Abiy is a man of exalted ambitions, whose officials trade in grandiose slogans—a model nation, food sovereignty, the end of a culture of begging—while the country beneath the rhetoric tells a harder story: anaemic foreign direct investment, a manufacturing sector whose share of output has fallen by a third on his watch, poverty rising toward 43%, 7 million in need of food aid, two-day diesel queues in the capital, and an election so denuded of competition that in 64 of 509 districts outside Tigray only the ruling party is standing. The centralisation that the government calls “unity,” *The Economist* argues, is in practice the concentration of the state and its economy under the executive's personal control; the share of the federal budget transferred to the regions has collapsed from 60% in 2018 to 20% in 2026; the heads of the army, air force and federal police, and the mayor of the capital, are all of the Prime Minister's ethnic stocks. And beyond the borders, the magazine concludes, the gravest danger is that the dream of restoring Ethiopia's direct access to the sea is in truth a dream of reviving the old Ethiopian Empire—a posture that, on the magazine's reading, makes a conflict with Eritrea all too plausible. The verdict that has circulated most widely since publication is blunt: that Abiy has, in effect, killed competitive politics.

The second is *Horn Review*'s, written by its Executive Director and framed around the state Abiy *inherited* and the nation he is *building* [4]. In this telling Abiy received in 2018 a state “approaching the limits” of the post-1991 settlement: fiscally strained, institutionally fragmented, its coercive apparatus “vertically integrated but internally segmented” and concentrated within one coalition component. His tenure is read as “simultaneous state reconstitution and political liberalization under conditions of elite rupture”—the Tigray war as the violent expression of a “breakdown of inter-elite consensus”; the economy buffeted less by policy error than by exogenous shocks (the pandemic, the Russia–Ukraine war, the Iran–Israel–US war, the closure of Hormuz); a programme of social investment in school meals, health insurance, digital identity and an emerging artificial-intelligence agenda; and a foreign policy of “strategic hedging” and “sovereignty preservation” that the West persistently misreads through “conflict and humanitarian crisis lenses.” The conclusion is unambiguous: the post-2018 period is “a foundational transformation rather than a failed interlude,” a state “set on a new, irreversible trajectory,” and the June election derives its legitimacy “from its function as an institutional mechanism... and not from predictability of outcome.”

Set the two side by side and the symmetry is striking. Where *The Economist* sees an autocrat centralising power, *Horn Review* sees a founder reconstituting a state. Where one sees a personalised vehicle that has emptied politics of contest, the other sees “institutionalization... through competitive constitutional processes.” Where one sees imperial ambition on the Red Sea, the other sees “strategic autonomy” misread by foreigners. The two pieces are, almost line for line, the same facts under opposite lighting. And precisely because they are opposite, what they have in common is easy to miss: **both make the man the subject**. Both argue about Abiy's character, Abiy's intentions, Abiy's trajectory. Neither

asks the prior question—the structural one—on which the answer to all the others depends: *within what architecture is this man, or any man, governing?* That is the question this article is about, and it is the question the four singular interests were built to answer.

A word, before going further, about why I take this personally enough to write but not personally enough to be partisan. My own son—now a freshman at what is, by the common rankings, the leading university in the world, having reached it on merit from one of Britain’s most competitive schools—belongs to the generation that is the actual stakeholder here. He is, like a great many of the high-calibre young Ethiopians and Ethiopian-heritage students I meet through my work, an admirer of the Prime Minister: not through propaganda but through the language of technology and possibility that Abiy, whatever else may be said of him, has spoken more fluently about technology than any Ethiopian leader before him. When my son defends Abiy, his argument is never that the man is faultless; it is that in a country this divided, this poor, and this unaccustomed to the disciplines of development, a leader who can persuade a young nation that transformation is *possible* is doing something necessary that his critics, for all their accuracy about his failures, cannot supply. I think my son is more right than *The Economist* and more honest than *Horn Review*. But I also think that neither his hope nor their analyses will mean very much unless the architecture is fixed—and that is the one thing none of them, my son included, has yet been asked to confront.

2 The Four Singular Interests, Restated as the Measure

The phrase “four singular interests” has, across this series, hardened from a list into an architecture, and the hardening matters because it is the architecture, not the list, that does the analytical work. The list form—GERD, the Red Sea, development, unity—invites exactly the error both *The Economist* and *Horn Review* commit: it makes the four look like items on a menu, from which a leader, a critic, or a foreign mediator may select the ones they favour and set aside the rest. They are not a menu. They are one proposition in three layers.

The proposition, in its settled form

Ethiopia, as a nation, does not exist without Unity and Red Sea Sovereignty. These are the **constitutive foundations**: take either away and what remains is a territory with administrators, not a nation with sovereignty. *Broad-based economic development anchored in democracy* is the **sustaining means**: prosperity without sovereignty is the condition of the protectorate; sovereignty without broad-based prosperity is the condition of the failed state. *The Grand Ethiopian Renaissance Dam* is the **engine**: its power is what makes the means feasible for the roughly 86 million Ethiopians under thirty who have no livelihood other than subsistence agriculture unless the country industrialises and urbanises. The single direction of the argument is **Foundations** → **Means** → **Engine**. None of the three layers is severable; none can be traded against another without dissolving the proposition itself.

Why insist on this as *the measure*, rather than the more familiar measures—democratic performance, human-rights record, GDP growth, electoral competitiveness—by which both pieces judge the Prime Minister? Not because those measures are worthless; they are indispensable, and I will use every one of them below. The insistence is that they are *denominated* in the four interests, not independent of them. A democratic deficit matters, in the final analysis, because it weakens the legitimacy that makes the defence of sovereignty credible at a bargaining table. A human-rights violation matters, beyond its intrinsic gravity, because it hands an adversary an alternative coalition to mobilise against the federation. A 9% rate of GDP growth matters only to the extent that it converts into household livelihoods rather than into the balance sheets of a connected few. Electoral competitiveness matters because a contest no one can lose produces a state no neighbour need respect. The four singular interests are the common currency in which every other indicator is priced. To argue about Abiy without pricing the argument in that currency—to argue, as both pieces do, about whether he is an autocrat or a founder—is to conduct an audit in a unit of account that does not convert into anything the nation actually needs.

The architecture also disposes, at the outset, of the loudest objection to my own position—that to defend

the national interest on the Red Sea and on unity is to apologise for a particular government. It is the reverse. Because the four interests are constitutive of the *state*, not of the *governing party*, they are precisely what allows one to support the national position while criticising the government's conduct without contradiction. I can hold—and do hold—that the float of the birr was correct in principle and brutal in distribution; that the corridor projects are real development and real display at once; that the centralisation *The Economist* documents is a genuine democratic regression *and* that the conclusion *The Economist* draws from it does not follow. The architecture makes these simultaneous judgements coherent rather than opportunistic, because it supplies a yardstick external to the man. But before that yardstick is applied to either portrait, the architecture itself needs one more foundation laid beneath it—a historical one—because the deepest reason both pieces misjudge the present is that neither has reckoned with the peculiar past from which it grows.

3 Sovereignty Paradox: Endurance Without Transformation

The question the 2026 election ought to have posed—and did not—is not who governs Ethiopia but whether the Ethiopian state can at last convert historical sovereignty into modern power. Ethiopia is almost unique in Africa in having an answer to that question that runs back not decades but millennia. It was not conjured by European cartography; its governing class was not replaced by a colonial administration; and though it endured the Fascist Italian occupation between 1936 and 1941, it survived that occupation as a civilisational entity rather than dissolving into a colony and re-emerging as a successor state. This is the fact every Ethiopian schoolchild is taught to be proud of, and the pride is earned. But it conceals a paradox that the proud telling never confronts: political sovereignty, in Ethiopia's case, did not produce developmental transformation. The country remained poor, under-industrialised, infra-structurally fragmented and institutionally uneven long after many formally colonised states had begun assembling modern bureaucratic economies. Sovereignty was preserved; modernity was not delivered. That is the paradox, and it is the hinge on which the four singular interests turn from aspiration into necessity.

Two interpretations of that paradox compete in Ethiopian intellectual life, and the choice between them is not academic, because each implies a different cure. The first holds that continuity itself became the constraint—that because the state preserved its sovereignty it also preserved what sovereignty had accumulated: aristocratic land structures, premodern hierarchies, a fragmented and unequal incorporation of its regions. The imperial order under Haile Selassie was centralised and agrarian, but it never acquired the bureaucratic penetration, the industrial discipline, or the mass-educational expansion that turned the East-Asian states into developmental ones after 1945. On this reading Ethiopia is poor *because* it was never broken and remade; it carried its past intact, and its past was a weight. The second interpretation argues nearly the reverse: that Ethiopian under-development is the residue of permanent geopolitical siege—a century and more spent defending territorial integrity, suppressing revolts, resisting intervention, surviving Cold-War proxy wars, and latterly containing the insurgent fragmentation that ethnic federalism itself produced. On this reading the state under-invested in transformation because it was perpetually compelled to invest in survival, and survival was never a settled fact.

Both are substantially true, and the truth of both is precisely why the four interests must be understood as a *sequence* rather than a wish-list. Ethiopia did preserve sovereignty and did fail to modernise at sufficient speed; it also faced genuine and recurring external pressures that broke the continuity any developmental programme requires. The lesson is not to choose between the two diagnoses but to read off the prescription they jointly imply: the task after 2026 is neither ideological reinvention nor a fresh slogan, but *strategic sequencing*—the organisation of national priorities into a doctrine capable of converting demographic scale and historical continuity into economic, institutional and geopolitical power. This is the same three-layer architecture set out above, now seen from its historical underside. The *foundations* layer—unity and Red Sea sovereignty—answers the siege interpretation: a state secure in

its citizenship and its strategic geography is no longer compelled to spend itself on survival. The *means* layer—broad-based development—answers the continuity interpretation: it is the bureaucratic, industrial and educational remaking that imperial sovereignty never performed. And the *engine*, GERD, is what makes the remaking physically possible. Foundations answer why the state was besieged; the means answer why it stagnated; the engine powers the escape from both. The architecture is not, at bottom, a political preference. It is the specific historical correction that two centuries of endurance-without-transformation have left Ethiopia needing to make.

Stated this way, the deepest charge against the constitution sharpens. The 1995 settlement did not merely fail to modernise; it actively re-encoded the continuity-constraint in a modern legal form. Where the imperial order preserved premodern hierarchy by inertia, the ethnic-federal order preserves fragmentation by *design*, converting what had been a cultural reality into the constitutional organising principle of sovereignty itself, and so rewarding the ethnic entrepreneur for deriving power from grievance and territorial competition rather than from productivity or institution-building. The siege the second interpretation describes is, in the post-1991 period, substantially *internal and self-generated*—the predictable output of an architecture that makes the apex a communal prize, as Section 8 will argue in detail. That is the sense in which the constitutional question is not one theme among several but the master variable: it is where the historical paradox and the present crisis meet. With that foundation laid, the remainder of this article applies the architecture's yardstick first to *The Economist's* portrait, then to *Horn Review's*, and finally to the constitution that both of them, in their different ways, decline to name.

4 *The Economist's* “Imperial Vision”: What It Gets Right

A rebuttal that does not first concede the strength of what it rebuts is propaganda, and I have no interest in writing propaganda for anyone. *The Economist's* portrait is the work of a magazine with a serious Horn-of-Africa correspondent and a long institutional memory, and its strongest claims are not rhetorical flourishes but facts that the four singular interests themselves require us to take seriously.

The economic indictment is the most substantial part, and most of it is true. The magazine's own figures are worth stating precisely, because they cut both ways and an honest reader must carry the whole of them. The IMF expects the economy to grow by 9.2% in 2026—less than the government's 10.2%, and probably optimistic given the quality of the statistics, but still more than double the sub-Saharan average; exports are projected to reach \$17.5 billion, a near-50% increase since 2024; annual inflation eased to single digits—about 9.7% by late 2025, down from roughly 15% a year earlier; government revenues and, more modestly, reserves have risen. These are not trivial achievements, and *The Economist* reports them fairly before turning to the indictment. But the indictment, too, is largely sound. Manufacturing's share of output has indeed fallen on Abiy's watch, even as the headline growth rate has impressed the IMF; an economy that grows at 9% while its industrial base contracts by a third is an economy growing on commodities, services and construction rather than on the structural transformation that alone makes growth durable. The foreign direct investment that the liberalisation was supposed to attract has been thin relative to the fanfare, for a reason *The Economist* states bluntly and correctly: large parts of the country are beyond the government's control and therefore off-limits to investors, foreign and domestic alike. The poverty figures are real and they are moving the wrong way; the World Bank's estimate that the share of the population living on three dollars a day or less has risen from a third to over 40% in a decade is not an artefact of hostile framing, and no amount of corridor photography rebuts it. The diesel queues are real. The dependence on Gulf fuel imports—some 97%—is a genuine strategic vulnerability, and the closure of Hormuz has exposed it. On the discipline of statistics, *The Economist's* complaint that official figures are increasingly difficult to credit is one I have made myself, in this series, about the gap between the corridor's image and the household's experience.

The political indictment is, if anything, harder to dismiss, and the four singular interests require me to

take it more seriously than the government’s defenders do. *The Economist* documents a collapse in federal transfers to the regions from 60% to 20% of the budget; a sovereign-wealth fund and an election “task force” concentrated under the executive; and a pattern of senior security and municipal appointments drawn disproportionately from his own ethnic stock. I have argued in the June 2026 essay [10] that the protective edge running along the borders of central Oromia does not protect the Oromo people—it protects a particular party architecture for as long as it holds office, and the community whose name a patron invokes is the community that pays when the rotation comes. *The Economist*’s observation that economic power appears to be shifting toward one group, conceded even by a prominent Oromo opposition figure, is the same fact seen from outside, and it is corrosive of exactly the *unity* foundation on which everything else rests. A state that cannot credibly claim to represent all its citizens is a state whose adversaries can always assemble an alternative coalition; that is not a liberal sentiment, it is a strategic vulnerability, and it is the first of the four interests written in red ink.

And the verdict that has travelled furthest—that Abiy has, in effect, killed competitive politics—points at something undeniable. A contest in which 64 districts offer a single legal candidate, in which the party that dominated the country for three decades has been outlawed rather than defeated, and in which no vote at all will be held across an entire region housing 6% of the population, is not a contest in the sense that word is supposed to carry. I will argue below that the deepest cause of this is not Abiy’s appetite but the constitution’s design. But the symptom is real, and a defence of the national interest that pretended otherwise would forfeit the credibility on which its own argument depends.

What was a forecast when these words were drafted is now a matter of record. On polling day, 1 June 2026, the National Electoral Board reported that 143 polling stations failed to open at all on security grounds, and that voting begun in the morning was suspended during the day across parts of Oromia and Amhara—Kersa, Kutaber, Bilonopa, Mekdela and other localities—with the Board unable even to obtain returns from constituencies in Benishangul-Gumuz and the south-west owing to telecommunications blackouts [15]. This sat atop an exclusion already baked in before a single ballot: the whole of Tigray and eight constituencies of Amhara held no federal vote, so that of 547 parliamentary seats only 501 were genuinely contested, and a federal-police risk assessment had flagged roughly a quarter of Amhara’s polling stations as high-risk “red” zones unfit for voting [17, 15]. The largest Oromo opposition parties—the Oromo Liberation Front and the Oromo Federalist Congress—had withdrawn from fielding candidates altogether, citing repression, with the consequence that the ruling party stood unopposed for a large share of seats; ten opposition parties had jointly called the exercise “a calendar without democracy” [16]. The point that matters for my argument is that the indictment is not a foreign one. It is pressed most damningly from *within* the Oromo political house that Abiy’s critics accuse him of favouring—Oromo opposition voices have been among the bluntest in naming the vote a hollow rite—which is the surest sign that “the contest is uncompetitive” is not an external slur but an internal verdict. None of this I dispute. A contest conducted under a partial blackout, with the main regional oppositions absent and whole regions dark, is not a free election in the sense the word is meant to carry, and to pretend otherwise would be to forfeit the credibility this article depends upon. My quarrel, again, is not with the fact but with where the fact is laid: at the door of a man, when it belongs to the architecture—as the next sections show.

What I concede to *The Economist*, without reservation

The manufacturing contraction, the anaemic FDI, the rising poverty share, the fuel-import vulnerability, the collapse in regional transfers, the over-representation of one community at the apex of the security and municipal apparatus, and the hollowing-out of electoral competition are real, documented, and serious. Each of them is a debit against one or more of the four singular interests—most gravely against *unity* and against *broad-based development anchored in democracy*. Any honest defence of the national position must carry these debits on its own books, not the opposition’s.

5 *The Economist's* “Imperial Vision”: Where the Frame Fails

Having conceded the debits, I now part company with the magazine—not on its facts, but on the frame it builds from them. The phrase “imperial vision” is not a neutral description; it is a thesis, and the thesis is wrong in three specific and consequential ways.

5.1 The category error: defensive sovereignty is not imperial expansion

The gravest error is the one embedded in the title. To describe Ethiopia’s pursuit of sovereign access to the sea as “imperial”—and, in the companion feature, to relay without much distance the Eritrean fear that the “ultimate goal is to revive the old Ethiopian Empire . . . by annexing their country”—is to collapse two categorically different things into one. There is a profound difference between a *defensive* interest in not having one’s entire external commerce and strategic depth held at the discretion of a single neighbour, and an *expansionist* interest in subjugating that neighbour. The first is the ordinary condition of every serious landlocked state in history; the second is conquest. The case I have made at length, and will not rehearse here [6, 7, 8, 9, 10], rests on Article 51 of the United Nations Charter: the inherent right of self-defence is *inherent*—antecedent to, and not derived from, the goodwill of neighbours or the licence of great powers. A nation of 130 million people whose sole maritime access can be closed by one neighbour’s decision does not have a commercial inconvenience; it has a permanent gun held to the head of its defence posture. To name the removal of that gun “imperial” is to define sovereignty itself as aggression whenever it is asserted by the larger party. By that logic every landlocked state’s interest in the sea is imperial, which empties the word of meaning.

It is worth stating the position without the diplomatic softening that has produced nothing in three decades, because the soft version is also the version most easily mistaken for the imperial one. Ethiopia holds the right to regain sovereign access to the Red Sea, and she will not ask any power’s blessing to exercise a right that is hers—whether by legal and negotiated means or, in the last resort and in self-defence of that right, by other means. The preferred and overwhelmingly primary instrument is peaceful: bilateral negotiation with Eritrea for a leased or sovereign strip of coastline of meaningful scale—concretely, the 180-to-200-kilometre stretch from the Doumeira Mountains on the Djibouti–Eritrea border southward to Beilul, linking the coast to the Danakil hinterland, that I have specified elsewhere [6, 7, 8, 9]—together with interim port-access agreements with Djibouti and Somaliland and a multilateral Horn maritime architecture anchored in the African Union. The legal case for peaceful recovery is strong, the regional economic incentives are mutual, and a negotiated settlement would serve Ethiopian interests better than any other outcome; peaceful recovery is therefore not merely the morally preferable course but the strategically superior one, and it should be pursued with the full weight of Ethiopian diplomacy.

But peaceful *priority* is not peaceful *exclusivity*, and the distinction is the precise hinge on which the charge of “imperial” turns or falls. Ethiopia’s maritime geography was not surrendered by any legitimate act of the Ethiopian people; it was removed at Eritrean independence, more than three decades ago—through a process in which Ethiopian citizens had no vote. The doctrine of *uti possidetis*, which freezes colonial boundaries at independence, was never designed to extinguish the rights of a state stripped of its coast decades *after* independence by an engineered political process, and the international community’s long silence on that structural injustice is not its legitimation. A state with the sovereign right to recover what was taken from it retains, as every state in the system would in its position, the right to defend that interest by whatever means its survival ultimately requires. To say so is not to threaten conquest; it is to refuse the pretence that the cost of foreclosing every reasonable peaceful arrangement is zero. And here is the point the “imperial” frame cannot absorb: a reserved right of last resort, exercised *in defence of an existing right against the closure of one’s only outlet*, is the opposite of an expansionist programme to *acquire* a neighbour’s territory. The first is self-defence, which Article 51 holds to be inherent. The second is conquest. The removal of the gun at Ethiopia’s head—by negotiation first, and by the means

a sovereign state reserves only if negotiation is refused to the point of strangulation—is not imperialism but its categorical opposite. Properly understood, then, “peaceful priority is not peaceful exclusivity” is a realist principle and not a war footing: it asserts that Ethiopia prefers negotiated and mutually beneficial settlements, while refusing the assumption that its permanent strategic exclusion from the sea must remain forever beyond historical reconsideration. Whether the international system chooses to accept that reasoning is a separate matter; but as a proposition of classical statecraft—a large and rising power declining to treat its own diminishment as final—it is neither irrational nor in any way historically unusual.

The instrument deployed elsewhere in the genre, though not by *The Economist* in so many words—the Al Jazeera columnist Tafi Mhaka makes it explicitly, and the Tribune’s own critics relay it [3]—is the analogy to Vladimir Putin, the name now reached for whenever a non-Western state asserts a territorial interest. The analogy deserves its strongest form, not its laziest, because in its strongest form it is *not* the claim that Putin expands while Ethiopia defends—Putin does not describe himself as an aggressor either. It is the claim that both make the same move: that a moment of imperial dissolution produced a border settlement now alleged to be unjust, and that the aggrieved successor is entitled to reopen it. Putin’s whole liturgy is that the Soviet collapse was a catastrophe engineered to Russia’s disadvantage, that the republican borders were Leninist accidents, that Russian populations were stranded by a settlement the West exploited and a weakened Russia was made to accept. Stated that way—a dissolution-era injustice awaiting correction—the structure sits uncomfortably close to the Ethiopian grievance over 1991–93, and “we defend, he expands” does not by itself separate them. The separation is real, but it lies deeper, on three axes the frame never reaches.

First, the object of the claim. Putin’s object is a nation—its subjugation, and at the limit the denial that it is a nation at all: his case rests on the proposition that Ukrainians are Russians misled and that Ukraine is an artificial state with no rightful separate existence. The Ethiopian object is a *window*: a bounded maritime outlet, the Doumeira–Beilul strip named above, an access right and not the abolition of a neighbour. Ethiopia does not deny that Eritrea is a nation—this series has said the opposite, repeatedly and without qualification, that the Eritrean future is for Eritreans to construct [10]. A claim to a coast is not a claim to a country, and a programme that begins by affirming the other’s nationhood is the categorical opposite of one that begins by denying it.

Second, the content of the alleged injustice. Grant that both invoke a wrong done at the moment of dissolution; ask then what each calls the wrong. Putin’s grievance is that the collapse let subject peoples *go free*—that the empire lost its dominion over nations that wished to leave it; his injustice is decolonisation, and his remedy is its reversal. Ethiopia’s grievance is that *it was dispossessed*—rendered the most populous landlocked nation on earth, its entire external commerce and strategic depth placed at one neighbour’s discretion, by a settlement in which its own people never voted. One party mourns a power it lost *over others* and means to take it back; the other mourns an outlet it lost *of its own* and means to recover it without revoking anyone’s freedom. These are not two instances of one grievance; they are opposite species—the lament of a gaoler and the lament of the dispossessed.

Third, the means—and here the rebuttal must be honest rather than triumphant. Putin’s correction *is* conquest: annexation by armed force, against the expressed will of the population, in open repudiation of borders Russia itself signed at Belavezha and guaranteed at Budapest. The Ethiopian claim is advanced—and can preserve the distinction *only so long as* it is advanced—as a claim: negotiation, lease, mutual port access, a multilateral Horn architecture, with force reserved no more widely than Article 51 reserves it for every state. The line between a legitimate claim and a Putinist one is therefore not secured by the justice of the grievance, which both sides assert, but by the lawfulness of the means, which only one side has so far kept. Ethiopia’s grievance, however well-founded, would not license Putin’s method; were Ethiopia to march on Assab to seize it, the analogy would at that moment acquire the purchase it now lacks. To say so is not to weaken the claim but to locate its legitimacy where it actually rests. And

it is consistent with the government's own word: addressing parliament in March 2025 and again that October, Abiy ruled out *seeking* war with Eritrea over the sea and called for peaceful resolution through dialogue and the requested mediation of the United States, the African Union and the European Union [12]—the posture of peaceful priority, not the renunciation of an inherent right. Having read a leader forswear the very war of conquest the frame imputes to him, one may doubt his sincerity; one may not continue to call that imputed conquest his *vision* without confronting the disavowal.

One corollary follows for the Ethiopian advocate, and it cuts against a tempting register. The closer the case is pressed in the language of *conspiracy*—that the West *engineered* the loss of the coast because it resented a Marxist Addis—the more it converges on the very Putin liturgy it should be refusing, for the conspiratorial dissolution-narrative is his native idiom. The stronger and more separating ground is the structural and procedural one: that a faction reached its settlement with Asmara at the strategic expense of a nation that was never consulted, and that no faithful steward of a unitary Ethiopian interest would have conceded the entire coast as the price of a victory. The fault, on this telling, is less a foreign plot than a domestic dereliction—and a dereliction is corrected by sober claim, not avenged by conquest.

The historical record, which *The Economist* treats as a curiosity weaponised by Abiy and feared by Eritreans, in fact disciplines the claim rather than inflating it. Ethiopia reached the sea on its own authority under the Aksumite kingdom and again under the medieval polity of Amde Tsion, whose chronicle records an imperial reach to Massawa and Zeila; the imperial coastline of the late nineteenth century was not a fantasy but a fact of the map; and the relationship with Eritrea had, between the UN-deliberated federation of 1952 and the imperial abrogation of 1962, a contested but genuine constitutional basis. None of this licenses annexation, and I have argued repeatedly that the Eritrean political future is for Eritreans to determine under conditions they themselves construct [10]. What the record licenses is precisely that *claim to sovereign access*, bounded by the Doumeira–Beilul geography named above and pursued by peaceful and legal means, with voluntary union neither programmed nor foreclosed. A claim bounded by law and history is the opposite of an imperial appetite; it is the discipline that an imperial appetite lacks.

There is even, embedded in the geopolitics *The Economist* reads only as risk, a *partner-quality* argument that its frame cannot accommodate. On the merits of the West's own stated objective in the southern Red Sea—containing Houthi maritime aggression and denying hostile powers the African shoulder of the Bab-el-Mandeb strait—Ethiopia is structurally the superior partner to the small littoral states currently relied upon: its population, standing forces, industrial base, institutional continuity and strategic depth dwarf theirs by an order of magnitude, and a credible Ethiopian presence on the Doumeira–Beilul strip, directly opposite the Yemeni coast, would contain that aggression at a level the incumbent arrangements have not delivered in thirty years. That this argument is not currently heard in Western capitals is a fact about Egyptian diplomacy and Gulf alignment, not about its merits. A frame that can see only “imperial vision” where there is a defensible partner-quality case is a frame that has decided its conclusion in advance of its evidence.

5.2 The capstone error: judging the election while ignoring the building

The second error is more interesting, because it is the error of a genuinely liberal sensibility applied without its own historical self-knowledge. *The Economist* judges Abiy, finally, by the quality of the election: politics is “killed” because the contest is uncompetitive. But competitiveness is the *capstone* of a democratic edifice, not its foundation, and *The Economist*—of all publications, heir to the Whig tradition it helped articulate—knows this better than anyone. Niall Ferguson's account of why British America converged with the modern world while Iberian America did not turns on exactly this point [18]: democracy was the capstone of an institutional building whose foundations—the rule of law, the security of the person and of property against arbitrary power, courts that constrain executives, statutes that bind ruler and ruled alike—were laid long before any franchise was extended. Confuse the capstone

for the building, Ferguson warns, and you build nothing: you hold elections in countries that are not yet republics.

It is worth stating the direction of that argument as bluntly as the four interests require, because it is the precise inversion the *means* layer of the architecture insists upon, and the one both pieces resist. **It is development that builds democracy, not democracy that builds development.** The foundations Ferguson names—courts that bind the powerful, property secure against the arbitrary, a literate and propertied middle class with something to defend, an administration that can issue a permit and enforce a contract—are not produced by holding a ballot. They are produced by the slow accretion of broad-based economic development: the schooling, the urbanisation, the firms, the taxed-and-represented middle class that a growing economy throws up and that then *demand*s the judiciary, the rights, the equality and the equity which are the working parts of a republic. Democracy is the capstone those parts can finally bear; it is not the scaffolding by which they are raised. This is exactly the sequence the East-Asian cases record—Korea and Taiwan built the developmental state and its institutions first, under conditions no one would call liberal, and arrived at competitive democracy a generation later, as the capstone of a building already standing [20]. The phrase in the means layer—*broad-based economic development anchored in democracy*—is therefore not a pairing of equals but an ordering: development is the anchor that grows the institutions; democracy is what those institutions, once grown, are strong enough to sustain. The honest qualification is that the sequence is necessary but not automatic: development that is *not* broad-based—captured by a connected few, as in the rentier cases I examine in Section 10—grows no such middle class and yields no such democracy, which is precisely why the “broad-based” qualifier carries the whole weight and is not decoration. To demand of Ethiopia the competitive election (the capstone) before the broad-based development (the foundation) has been poured is to get the order of construction exactly backwards—and it is the error that thirty-five years of capstone-first prescription has already proven on the ground.

This is the inversion the Ethiopian conversation has needed for thirty-five years, and it is the one *The Economist* does not perform. To lament that the 2026 contest is uncompetitive, without asking whether the constitutional foundations on which a competitive *civic* contest could be held exist at all, is to demand the capstone of a building whose foundation has never been poured. The 1995 constitution, as I show in Section 8, vests sovereignty not in the individual citizen but in “Nations, Nationalities and Peoples,” and entrenches secession as a group right. In such an architecture an election is not a contest between citizens over policy; it is a census of ethnic blocs over entitlement. *The Economist* is right that the contest is hollow. It is wrong to lay the hollowness at Abiy’s door alone, as though a more virtuous executive operating within the same constitution would have produced a genuine multiparty civic democracy. He would not have. The constitution would have converted his virtue, as it converts every executive’s, into the patronage of a faction. *The Economist*’s frame cannot see this, because its frame is the man.

5.3 The sequencing error: the city before the factory

The third error is the most technical and the most quietly consequential. *The Economist* treats the corridor projects, the airport, the parks and cycle-lanes, the razing of the old centre for hotels and apartments, as the vanity of an imperial imagination—“a facelift,” grandiosity in concrete. Some of it is display, and I will say so plainly in Section 9. But the analytical premise that infrastructure is luxury consumption is false in the Ethiopian case, and it inverts the actual mechanism of development. Urban infrastructure is the *precondition* of private investment, not its competitor [22, 23]. No manufacturer establishes a plant where there is no reliable power, no logistics corridor, no administration capable of issuing a permit; the GERD-powered industrial parks are not separable from the urban investment *The Economist* derides as a facelift—they are the same strategy in two registers. The criticism that manufacturing should have come *before* the city gets the order of operations backwards. The disappointing FDI

figure that *The Economist* correctly reports is explained far more by the insecurity it also reports—large territories off-limits to investors—than by any failure of the urbanisation logic. The remedy for thin investment is not less city-building; it is the *unity* that makes the country investable, which returns us, again, to the foundations.

5.4 The biographical fallacy: a mother’s blessing is not a manifesto

The fourth error is the one the frame announces itself with, in its choice of opening evidence. The portrait is reported to begin where this genre almost always begins—with the story that Abiy’s mother told him, as a boy, that he would one day be a king. It is offered as a kind of overture: here, before the argument starts, is the imperial psychology in miniature, the childhood prophecy that explains the grown man. But a mother’s blessing is not a constitutional manifesto, and to read one as the other is not analysis; it is literary decoration wearing the costume of diagnosis. Mothers in Jimma and Gondar and Mekele and Dire Dawa speak greatness over their children every day, in exactly this idiom; it is how love talks in this culture. To convert that idiom into evidence of monarchical ambition is to mistake a genre of maternal hope for a statement of political intent—and it is, once again, the same error in a new dress: the man, not the architecture, is made the cause.

The same over-reading of intent recurs in the claim that Abiy means never to leave power. He may; words are not institutions, and I take no view here on what a second mandate will become. But the public record is more mixed than the suspicion allows—this is, after all, the same figure who in 2018 endorsed a two-term limit on the premiership and called the era of power-for-life a dead end—and an analysis that treats the darkest available reading of a man’s intentions as established fact has stopped describing the evidence and started selecting it. The point is not that the benign reading is correct. It is that the frame no longer permits the benign reading to be tested, because the frame has already concluded.

Nowhere is that prior conclusion clearer than in the treatment of the one development success hardest to wave away. *The Economist*, on the characterisations available to me, files the wheat self-sufficiency drive under illusion—a politically convenient number rather than a harvest. Here the double standard becomes visible: when an African state fails, the failure is taken as the deep truth of the place; when it succeeds, the success is presumed a mirage until proven otherwise. But the wheat story is not a government press release. The Food and Agriculture Organization awarded Abiy its Agricola Medal in January 2024, explicitly for the Wheat for Food Self-Sufficiency programme [13]; Ethiopia made its first wheat export shipments from 2023. The medal is not, on its own, dispositive—it drew sharp and fair criticism for having been struck while parts of the north were in the grip of food insecurity, and I would not rest a case on a ceremony in Rome. The harder facts beneath it are what matter: a programme that took the country from wheat importer to exporter inside five years is not nothing, whatever the contested headline tonnages. The honest position—which I set out in full on the credit side of the ledger in Section 9—is that the harvest is real and its headline scale needs independent verification. To leap past that to “mirage” is, precisely, a frame deciding its conclusion in advance of its evidence: the identical move I traced in the partner-quality case above, applied now to a medal struck in Rome.

5.5 The patronage misreading: pressure, not coddling

The last error reaches outward, to the West’s own role. The portrait implies that Abiy is in part the West’s creation—that Western “coddling” indulged his excesses and enabled his drift. The record does not support the picture of an indulged client. In its gravest hour, during the Tigray war, Washington did not embrace Addis Ababa: it removed Ethiopia from the AGOA trade preferences with effect from the start of 2022, citing gross human-rights violations in the northern conflict. That is not coddling; it is sanction. What has happened since is not indulgence either but recalibration on terms: in April 2026 the European

Union resumed budget support to Ethiopia—some 140 million euro—after a five-year suspension imposed over the same war, and it did so explicitly against reform milestones, as one tranche of a conditional, staged re-engagement [14]. Great powers engage Ethiopia not because they are sentimental but because its size, its demography and its position give geography a vote; and they have shown, by turns, that the engagement carries conditions and can be withdrawn. A frame that reads conditional, milestone-linked re-engagement as a blank cheque has confused realism with romance—and, more to my point, has once again located in Western affection for the man what is in fact a structural calculation about the place.

The shape of the failure. *The Economist's* facts are largely sound; its frame converts a *defensive sovereignty interest* into an *imperial ambition*, a *constitutional defect* into a *personal autocracy*, a *development sequence* into a *vanity*, a *mother's blessing* into a *manifesto*, and *conditional Western re-engagement* into *coddling*. Each conversion makes the man the cause of what is, in truth, a property of the architecture or a fact about the wider world. The cumulative effect is an analysis that is accurate in its debits and wrong in its verdict—and whose practical implication, were it acted upon by the diaspora lobbies and foreign chancelleries that read it, would be to weaken the very sovereignty whose defence is the first of the four interests.

6 *Horn Review's* “Managed Rupture”: What It Gets Right

If *The Economist* errs by making the man a villain, *Horn Review* errs by making him a founder; but before the second error can be examined, the genuine insight of the piece must be credited, because it is real and *The Economist* lacks it.

The insight is the inheritance. *Horn Review* is right, and unfashionably so in diaspora discourse, that the state Abiy received in 2018 was not a stable order he then destabilised but an order already “approaching the limits” of its post-1991 settlement. The fiscal strain, the chronic foreign-exchange shortage, the over-securitised model of governance, the concentration of coercive authority within one coalition component—these were not Abiy's creations; they were the conditions of his accession, and any honest accounting of the past eight years has to begin from them rather than from a fictional 2017 in which all was well. *The Economist's* throwaway line that “before Mr Abiy took power Ethiopia was an autocratic but largely stable country” is precisely the complacency *Horn Review* punctures: the stability was the managed stability of a single coalition's dominance, purchased by the suppression that the 2015–2018 protests in Oromia and Amhara were the sound of failing. To treat that suppression-stability as a baseline against which Abiy's turbulence is measured is to mistake the lid for the absence of the boil.

Horn Review is also right that the external shocks were severe and largely exogenous. A country that floats its currency into the headwinds of a pandemic, a European war that spiked fertiliser and wheat, a Middle-Eastern war, and the closure of a strait through which nearly all its fuel arrives, is a country whose macroeconomic managers deserve some part of the indulgence the piece extends. And the social investment it catalogues—school meals, free uniforms, a state-subsidised health-insurance push, the digital-identity rollout, the early-childhood and education programmes—is real, is broadly progressive in incidence, and is systematically under-reported by a foreign press whose Ethiopia file is, as *Horn Review* fairly complains, organised around conflict and famine. The four singular interests give this its due: to the extent that these programmes reach the rural and urban poor rather than the connected few, they are deposits against the *broad-based development* interest, and they belong on the credit side of the ledger *The Economist* keeps only in debits.

Finally, the diagnosis of foreign policy as “strategic hedging” is more accurate than the “imperial” frame it implicitly answers. A small-and-medium-power surrounded by Gulf rivalries, Nile-basin tensions and great-power competition that diversifies its relationships and refuses exclusive dependence is behaving rationally, not megalomaniacally. On this narrow point *Horn Review* reads the Horn more soberly than *The Economist* does.

7 *Horn Review*'s “Managed Rupture”: Four Evasions

The strength of *Horn Review*'s inheritance argument is also the cover for its weaknesses, because once the state is described as broken-on-receipt, almost any subsequent concentration of power can be re-described as repair. This is the characteristic move of an analysis written from within the governing project, and it produces four evasions that the four singular interests do not permit. The first three are sins of commission—euphemism, assertion, and silence; the fourth, examined last, is the alibi that makes the others respectable.

7.1 Euphemism in place of the professional-army question

The first evasion is linguistic, and it is the most revealing. *Horn Review* writes of the coercive apparatus in the language of systems theory—“vertically integrated but internally segmented structures,” “discontinuities in command cohesion,” “realignments within segments of the security apparatus as institutional loyalty was tested.” This is the prose of an institution that does not wish to name what it is describing. What it is describing is the reconstruction of the security forces around political loyalty, and the open question—raised across the entire political spectrum, not only by the opposition—is whether the army serves the constitution or the executive. I have argued that this is the single most important institutional question of the second mandate [10]: an armed force loyal to the person of the executive is, in every historical case, a sword the executive keeps at his own neck; loyalty without integrity eventually acquires the discretion to revoke itself. *Horn Review* cannot say this, because to say it would be to concede that the “reconstitution” it praises has, in the security domain, taken the dangerous rather than the professional path. So it euphemises. But a euphemism is not an analysis, and the *unity* foundation cannot be defended by a force whose conduct the federation's own citizens experience as factional.

7.2 Assertion in place of argument: the “irreversible trajectory”

The second evasion is the claim that the transformation is “foundational rather than a failed interlude” and has set the state on “a new, irreversible trajectory.” This is not analysis; it is prophecy, and prophecy is the characteristic genre of a think-tank speaking for a project rather than about it. Nothing in the political history of the Ethiopian state warrants the word “irreversible.” The imperial order was reversible and was reversed in 1974; the Derg's was reversible and was reversed in 1991; the EPRDF's ethnic-federal settlement was, on *Horn Review*'s own telling, reversible and is being reversed now. To assert irreversibility on behalf of the current settlement is to claim for it an exemption from the very mortality the piece has just documented in all its predecessors. The four singular interests expose the stakes of the bluff: a “trajectory” that rests on the concentration of authority in one office, defended by a force of contested professionalism, contested simultaneously by armed movements in Tigray, Amhara and parts of Oromia, is not irreversible—it is, on the available evidence, *precarious*, and calling it irreversible is a way of declining to do the work that would actually make it durable.

7.3 Silence in place of the constitutional question

The third evasion is the deepest, and it is the one that joins *Horn Review* to *The Economist* at the precise point where both fail. *Horn Review* writes, approvingly, of an effort to move “away from zero-sum ethno-nationalist framing toward a more centralized civic conception of statehood.” This is the right direction—it is, in substance, the direction I have argued for. But the piece never once names the obstacle: the 1995 constitution makes a civic conception of statehood *unconstitutional at its foundation*. You cannot move “toward a civic conception of statehood” by executive preference or Prosperity-Party messaging while Article 8 vests sovereignty in “Nations, Nationalities and Peoples” and Article 39 entrenches ethnic secession; the civic conception and the constitutional text are in direct contradiction, and the contradiction is resolved, every time, in favour of the text, because the text is the supreme law and

the messaging is not. *Horn Review* praises the destination while refusing to mention that the road there runs straight through constitutional reform—reform that the governing project has shown no appetite to undertake, because the same ethnic-federal architecture that frustrates a civic Ethiopia is also the architecture through which the governing coalition holds power. This is the silence of an interested party. It is precisely the silence that the four singular interests are designed to break.

7.4 The alibi of the exogenous shock

A fourth move sits beneath the other three and deserves separate notice, because it is the most seductive. *Horn Review* attributes the economy's pain very largely to forces outside the government's control—the pandemic, the European war, the Middle-Eastern war, the closure of Hormuz. The shocks were real, and I credited them in the previous section. But the alibi proves too much, because it does not distinguish between the pain a shock *imposes* and the pain a *domestic choice* distributes. The closure of Hormuz imposed the diesel queues; no one chose them. The *design* of the float, by contrast—its speed, its sequencing, the thinness of the cushioning extended to public-sector workers and the salaried middle as the birr lost some 170% of its value against the dollar over 20 months—was a domestic policy choice, made in Addis Ababa under an IMF programme, not a meteorological event. To fold the distributional brutality of the reform into the same category as the war that closed the strait is to launder a choice as a circumstance. The four singular interests do not allow it: the *broad-based* qualifier on the development interest is precisely a demand that the state own its distributional choices rather than attribute them to the weather. A government may plead the shock for what the shock did; it may not plead the shock for what it itself decided.

7.5 The mirror, completed

The four evasions are not random; they are the systematic distortions an analysis acquires when it is written *for* a project rather than *about* one, just as *The Economist's* three errors are the systematic distortions an analysis acquires when it is written *against* a man rather than about an architecture. Put the two together and the symmetry resolves into a single diagnosis.

Two frames, one blind spot

The Economist makes the man a villain and so cannot see that the hollow election is a property of the constitution, not of Abiy's appetite. *Horn Review* makes the man a founder and so cannot say that the "civic statehood" it praises is forbidden by the constitution it declines to mention. The two pieces fail at the same coordinate, from opposite directions. The villain-frame and the founder-frame are the two ways of *not discussing the architecture*—and the architecture is the only thing that determines what reforms any executive, Abiy or his successor, can actually introduce.

8 It Is the Constitution, Stupid

In 1992 James Carville pinned a phrase to the wall of a campaign office—*It's the economy, stupid*—and it worked because it inverted the conventional question. Instead of asking which candidate was more virtuous, more presidential, more like the country's image of itself, it asked which candidate's reading of the country's actual material condition was correct. The Ethiopian conversation needs the same inversion, with a different noun. For thirty-five years it has asked which leader is more committed to democracy, more reformist, more like the diaspora's image of a worthy executive—and it has produced thirty-five years of disappointment, because the leaders who answered that question well still found themselves governing a country whose constitution converts any reformist intention into the patronage of a faction. The structural question is the constitution. *Is it the constitution, stupid?*

The 1995 constitution organises the polity not around individuals bearing rights against the state but around ethno-linguistic "Nations, Nationalities and Peoples" bearing collective entitlements within it.

Article 8 vests sovereignty in those groups rather than in the people as individuals; Article 39 makes secession a constitutional right of ethnic groups. In this architecture the individual citizen is, at all times, a member of an ethnic group first and an Ethiopian only to the extent that her group's relations with other groups permit. Her rights—to property, to movement, to association, to political participation—are not held against the state by virtue of her personhood; they are conferred upon her by virtue of her group's standing in the federation. Christopher Clapham, whose scholarship on the Ethiopian state spans half a century, has observed that this design is *novel* in the comparative-federal record [19]: no successful federation has been built on the proposition that ethnicity is the foundational unit of political sovereignty, with entrenched secession for ethnic groups. The novelty is not innovation; it is an experiment whose terms are structurally suicidal, because the architecture rewards every ethnic political class for maximising its group's standing within the federation rather than for defending the federation against the next coalition's group claim.

This is the sense in which I have called the constitution “stupid”—not as an insult but as a diagnosis. A constitution is stupid in the precise, engineering sense when its incentive structure produces the opposite of what it was meant to secure. This one was meant to secure peace among diverse peoples; it has instead institutionalised a permanent, zero-sum competition among ethnic blocs for control of the apex of the state, in which whoever holds the apex governs as the patron of his community and whoever does not arms himself to contest it. The competition is not a malfunction of the design; it *is* the design. *The Economist's* hollow election and *Horn Review's* euphemised security apparatus are both outputs of this single input. So is the simultaneity of three insurgencies. So is the over-representation of one community at the apex that *The Economist* correctly notes—not because Abiy is uniquely ethnocentric but because the constitution makes the apex a communal prize and rewards whoever holds it for distributing accordingly.

The downstream symptoms are worth tracing concretely, because their common origin is so often missed. Consider that the federal state cannot hold elections in 5 disputed districts on the Tigray–Amhara boundary, or in an entire region housing 6% of the population, because the constitution assigned territory to ethnically defined units without a mechanism to adjudicate the inevitable boundary disputes other than the political weight of the contending blocs—so Welkait, Raya, the Metekel zone on which Africa's largest dam actually stands, and a dozen other contested territories become permanent flashpoints rather than administrable questions of law. Consider that the very act of counting the population—an ordinary administrative necessity in any state—becomes, under this constitution, an existential contest, because the census fixes the ethnic shares on which constitutional entitlement depends, so that every enumeration is fought as a zero-sum struggle and no recent count commands cross-bloc trust. Consider that the cities—Addis Ababa, Hawassa, Dire Dawa, mixed by their very nature—are forced into a constitutional architecture that treats mixedness as an anomaly, generating recurring conflict over which bloc “owns” the urban space. None of these is a failure of a particular minister. Each is the predictable output of a constitution that made the group, rather than the citizen, the unit of everything. A state cannot count its people, draw its boundaries, or govern its cities without re-fighting the ethnic question, because the ethnic question was written into the foundation. That is what “stupid” means, in the engineering sense: the structure cannot perform its ordinary functions without re-triggering the very conflict it was meant to contain.

The corrective is not the abolition of regional or cultural self-government, and it is essential to say so clearly, because the ethnic-entrepreneurs of every community will claim that constitutional reform is an attack on their people's identity. It is not. The rule-of-law principle is content, not container; it travels in widely different administrative architectures so long as the unit of sovereignty is the person rather than the group. The United Kingdom devolves substantial legislative power to Scotland, Wales and Northern Ireland and recognises their distinct linguistic and cultural traditions, yet a Scot in London remains a citizen whose rights derive from her personhood and the constitutional settlement that protects it, not from her nation's standing in the union. Switzerland organises 26 cantons of four languages and entrusts

them very wide autonomy, yet its constitution owes equality and non-discrimination to the *individual*, and no canton holds communal sovereignty over those who reside within it. In neither case does the group stand between the citizen and the constitution; in both, the constitution defends the citizen *also* against the group of which she is a member, and the group's cultural standing is preserved precisely *because* the citizens who compose it are protected as individuals first. Genuinely secured individual freedom is the guarantor of group interest, not its competitor.

This is why both *The Economist* and *Horn Review*, by keeping the argument on the man, end up *limiting* the reforms a leader could attempt. *The Economist's* frame implies that the remedy for Ethiopia's troubles is a better, less imperial leader operating within the present constitution—a remedy that cannot work, because the constitution would factionalise the better leader too. *Horn Review's* frame implies that the remedy is the continued “reconstitution” of the state under the present leadership—a remedy that stops exactly short of the constitutional reform without which “civic statehood” is a phrase, not a programme. Both frames license everything except the one reform that matters. The four singular interests insist on naming it: **until the unit of sovereignty in the supreme law is the person rather than the group, no executive of any disposition will be able to govern as a national executive rather than as the patron of a faction**—and the *unity* foundation, on which the Red Sea, the development and the dam all rest, will remain a wish rather than a settlement.

9 The Ledger, Honestly Kept: What Abiy Is Actually Doing

It is one thing to say that the architecture is the subject; it is another to pretend the architect does not matter. Within the constraints the constitution imposes, leaders still choose, and the choices Abiy has made are neither the unbroken ascent his think-tank describes nor the imperial descent the magazine implies. They are a ledger, with real entries on both sides, and the four singular interests are the accounting standard.

9.1 The credit side: the demonstration that transformation is possible

Begin with the entry his critics find hardest to value, because it does not appear on a balance sheet: Abiy has changed what Ethiopians believe is possible. The corridor projects, the Green Legacy plantings, the lakeside promenades, the rehabilitation of the capital's centre, the tourism cross-hair trained on a country that was a byword for famine—much of this is, yes, display. But display, in a country whose dominant political emotion for a generation has been a fatalistic expectation that nothing will ever change, is not nothing. Park Chung-hee told South Koreans they would become a wealthy industrial nation when per-capita income was below a hundred dollars [20]; Deng Xiaoping told the Chinese Communist Party it was glorious to get rich while the economy was still agrarian and the Cultural Revolution was raw memory [21]. Both were ridiculed by serious economists for decoupling ambition from structural reality. Both were selling the necessary precondition of the transformation itself: a national conviction that the existing order was not destiny. Abiy's “nothing can stop us” is easy to mock from a welfare-economics seminar; it is considerably harder to replace as an instrument for assembling a development coalition across forty communities with deep mutual grievances. The vision premium is real, and *The Economist*, which can only see the gap between the rhetoric and the household data, cannot price it.

The structural openings are real too, and they belong on the credit side. The float of the birr, brutal as its distribution has been, ended a foreign-exchange regime that had become a rationing system for the connected; the parallel-market premium has narrowed to within a few birr of the official rate, which is the signature of a unification that has largely worked. Banking and telecoms have been opened to foreign participation. Public–private partnership has moved from slogan to instrument—the geothermal frameworks, the energy-and-digitalisation programmes, the four-billion-dollar Dangote fertiliser plant that, if built, attacks the import dependence *Horn Review* and *The Economist* both lament. Forex

availability, from the trough of the pre-float rationing, has improved. None of this is the whole of development, and some of it may not survive contact with the next external shock. But each is a deposit against the *means* interest, and an honest ledger records deposits as well as withdrawals.

9.2 The debit side: the millionaires, the destitute, and the collapsing middle

Now the withdrawals, which the four singular interests force me to enter in full. Ethiopia is counting more multi-millionaires under this leadership than at any point in its history—and, at the same time, more destitute, and a middle class being crushed between an inflation that has eroded salaried incomes and a reform whose gains have accrued disproportionately to those positioned to capture them. This is the single most dangerous fact in the ledger, because the *broad-based* qualifier on the development interest is not decorative. Growth that mints an industrialist class while hollowing the salaried middle is not broad-based development; it is the rentier trajectory I have elsewhere called the Malaysian path, as opposed to the disciplined Korean one [10]. The diagnostic questions are concrete and unanswered: *are the poor being asked to subsidise an emerging industrialist class? Is state monopoly, defended as “entrepreneurial,” crowding out the private competition that alone makes growth durable?* A sovereign wealth fund chaired by the Prime Minister himself, without the constitutional separation of fiduciary from political authority that makes Singapore’s Temasek developmental rather than predatory, is an institution sitting on the wrong side of that question until proven otherwise. These are debits against the *means*, and they are large.

9.3 Between Oromummaa and the saviour: why both portraits are too small

His detractors paint him as an *Oromummaa* ethno-nationalist whose unity rhetoric is a disguise for his own ethnic stock’s ascendancy. His supporters—my own son among the more thoughtful of them—argue that in a country this divided, this poor, this unaccustomed to development, he is doing his level best to set an example, and that the example is working. The four singular interests let me say that both portraits are too small, and for the same reason. The detractors are describing a real phenomenon—the over-representation *The Economist* documents is not imaginary—but they misattribute its cause to the man’s ethnicity when its cause is the constitution that makes the apex a communal prize; were a leader of any other community to hold it, the same logic would distribute the same way, in that community’s favour. The supporters are describing a real achievement—the demonstration of possibility, the structural openings—but they overstate its durability when they imagine that vision and reform can substitute for the constitutional repair without which every gain remains hostage to the next factional rotation. Abiy is neither the ethnic predator of the first portrait nor the founder-saviour of the second. He is an unusually capable executive operating inside a constitution designed to defeat capable executives, who has used the room it leaves him partly for genuine reform and partly for the consolidation that the same constitution rewards. That is a harder thing to put on a placard, which is exactly why neither the diaspora’s placards nor the think-tank’s press releases will say it.

10 The Asian Mirror: Direction, Not Destiny

Both pieces invoke, implicitly, a comparison Ethiopia cannot avoid. *Horn Review* gestures at a developmental-state transformation; *The Economist* doubts it is real. The right way to adjudicate is to hold Ethiopia up to the mirror of the Asian economies whose trajectories Ethiopians invoke most often—and to be precise about what that mirror actually shows, because the lesson is not the one either piece draws.

The first thing the mirror shows is that the leaders who presided over the great East-Asian ascents were not the liberal-democratic reformers *The Economist* would recognise as worthy, nor the benevolent founders *Horn Review* would canonise. Park Chung-hee ruled Korea by coup and decree; Chiang Kai-shek’s Taiwan was a one-party martial-law state for four decades; Lee Kuan Yew’s Singapore was, and

in important respects remains, a managed democracy; Deng’s China was a Leninist party-state. The variable that produced their results was not the virtue of the ruler and not the competitiveness of the ballot. It was *disciplined developmental sequencing*: a state that subordinated short-term consumption to long-term capacity, that disciplined its own firms by exposing them to external performance tests, and that protected the fruits of growth from capture by the politically connected. This is precisely the standard against which Ethiopia’s second-mandate economy should be judged, and it is a standard neither piece applies, because it is external to the man.

The second thing the mirror shows is that the same instruments produce opposite outcomes depending on three governance variables, and the cleanest illustration is the contrast between Singapore’s Temasek and Malaysia’s Khazanah—two state-holding companies built on nominally the same model, with results an order of magnitude apart.

Governance variable	Temasek (Singapore)	Khazanah (Malaysia)
Constitutional protection of fund assets from executive draw-down	Yes — past reserves protected; draw-down requires the elected President’s assent	No — assets drawn upon to service political liabilities (e.g. 1MDB)
Board independence from the head of government	Yes — career professional leadership, no political proximity	No — chairmanship politically determined, moved between ministries
Subsidiary-level financial transparency	Yes — exceeds the Santiago Principles; Aaa/AAA rated	No — opaque consolidated reporting that obscured transactions
Outcome	Developmental: ~14% annualised return since 1974	Predatory failure mode: kleptocratic capture

Table 1: Two state-holding architectures, three variables, opposite results. The instrument is neutral; the governance determines whether it is developmental or predatory.

The relevance to Ethiopia is immediate and uncomfortable. Ethiopian Investment Holdings, the sovereign vehicle established in 2021—the same fund *The Economist* notes is “under his thumb”—is chaired by the Prime Minister himself; it has not yet published subsidiary-level statements on the Temasek standard; and its mandate is explicitly that of an “entrepreneurial state” pursuing development through state-owned enterprises rather than through their disciplining or divestment. On all three of the variables that separate Temasek from Khazanah, Ethiopia presently sits on the Malaysian side of the line. This is not yet destiny—it is direction, and direction is reversible by deliberate institutional choice—but it is the single most important economic fact the second mandate must confront, and it is a fact that *Horn Review*’s “reconstitution” frame is structurally unable to state and *The Economist*’s “imperial” frame mislabels as mere power-hoarding.

The third thing the mirror shows is the danger of the rentier path that an undisciplined state-holding architecture produces. When state-owned firms are assessed by political rather than commercial metrics, when their losses are absorbed by the budget, when their executives are appointed by patronage, and when their private competitors are denied the foreign exchange and credit the state firms enjoy, the result is not the Korean export discipline but its inverse: a small connected class enriched at public expense while the broad base of the economy is starved of the inputs it needs to grow. Ethiopia’s own debt-sustainability analysis has already flagged a domestic state-enterprise debt that is highly concentrated, publicly guaranteed, and not regularly serviced—the precise failure mode the Korean discipline was designed to prevent. The emergence of a multi-millionaire class beside a collapsing middle class, which I entered as the gravest debit in the ledger above, is the visible surface of exactly this submerged architecture. The mirror’s verdict is therefore neither *The Economist*’s (a vain autocrat) nor *Horn Review*’s (an irreversible founder). It is a third thing: a country at a fork, with the instruments of a developmental state in its hands and the governance of a rentier one, whose direction the second mandate will either correct or entrench. The four singular interests demand the correction, because broad-based

development *anchored in democracy* is the means layer of the architecture, and a rentier state cannot supply it.

11 The Ethiopian Illness, and the Discipline of Nations

There is a national habit that no constitution can repair and that every honest Ethiopian should be willing to name in the first person, because I include myself in it. We demand perfection from our leaders and from one another while exempting ourselves from the ordinary disciplines that built every nation we envy. We expect a government to deliver, in eight years, a transformation that took Korea, Taiwan, Japan and China two generations of grinding, often brutal, frequently unglamorous work—and we expect it while declining, collectively, to do the boring things on which such transformations actually rest: to obey the law when no one is watching, to pay tax, to keep a contract, to show up, to build a thing and maintain it, to subordinate the gratifications of grievance to the slow accumulation of competence. The nations whose trajectories we admire did not ascend on the wings of a perfect leader. They ascended because, at some point, enough of their people decided to become law-abiding, hard-working citizens of a project larger than their faction, and to keep deciding it through decades in which the leadership was frequently authoritarian, frequently corrupt, and always imperfect. Park's Korea was a dictatorship. Meiji Japan was an oligarchy. Deng's China was, and is, a one-party state. The variable that distinguished them was not the virtue of the ruler; it was the discipline of the ruled.

It is worth dwelling on how much pain those trajectories actually contained, because Ethiopians invoke them as success stories while forgetting the decades of hardship through which the success was bought. Korea in 1960 was poorer than Ethiopia is today—a war-ruined, aid-dependent country whose people endured years of austerity, suppressed consumption and political repression while the state forced savings into heavy industry; the prosperity arrived a generation later, to citizens who had spent that generation working rather than waiting. Meiji Japan industrialised on the backs of a peasantry taxed to the edge of subsistence to finance the railways and factories their grandchildren would inherit. Taiwan's farmers and workers lived under martial law for thirty-eight years while the export economy was built. China's reform generation absorbed dislocation, inequality and insecurity on a scale that would have broken a less patient society, and did so for decades before the gains became broad. The uncomfortable truth the mirror returns is that no nation has industrialised painlessly, none has done it in eight years, and none has done it while its people demanded perfection from their government and exempted themselves from the work. Ethiopians who point to Seoul's skyline as proof of what is possible are right that it is possible; they are wrong to imagine it came without the decades of disciplined, unglamorous, frequently bitter effort that they themselves have so far been unwilling to contemplate. The lesson is not that Ethiopia needs a better leader. It is that Ethiopia needs a more patient and more disciplined people—and that this, not the identity of the Prime Minister, is the true variable on which the four singular interests turn.

This is the context in which I want to address the diaspora's role, and I want to do it carefully, because the careless version of this point is both unkind and analytically lazy. The careful version is this: distance changes incentives. A citizen inside the country bears the consequences of the politics she practises—the road that does or does not get built, the peace that does or does not hold, the price of teff next month. A participant at three thousand miles bears almost none of them, and the political economy of that distance is corrosive in a specific, structural way. It rewards the production of *affect* over the production of *outcomes*: the post that enrages, the rumour that spreads, the clip that confirms what its audience already believes. It selects, on every side of the political divide, for the entrepreneurs of grievance over the builders of institutions, because grievance travels on social media and institution-building does not. The result is a diaspora information ecosystem that can manufacture disinformation at industrial scale while contributing almost nothing to the patient, local, unglamorous work that the four singular interests actually require. This is not a claim about any individual's worth, and it is emphatically not a claim

about any category of person. It is a claim about what distance does to incentives, and it applies with equal force to the diaspora that lobbies for sanctions against Ethiopia in the name of accountability and to the diaspora that drowns every legitimate criticism in the noise of #NoMore. Both are practising the politics of affect from a position that bears none of its costs, and both, in doing so, weaken the country they claim to love.

The discipline I am asking for is therefore symmetrical and mundane. It is the refusal to amplify rumour; the refusal to attribute motive on the basis of ethnicity; the willingness to hold our own intellectual heroes to the standards we apply to those we oppose; the willingness, above all, to abandon what I have called the monkey-habit of ethnic politics—the reflex of asking, of every event, not “is this good for Ethiopia?” but “is this good for my group’s standing in the federation?” That reflex is the constitution’s, internalised. The young generation, who did not author the grievances that organise their elders’ loyalties, are the only constituency large enough and unencumbered enough to break it. Whether they do is the most important open question in the country, more important than the election, more important than the man.

12 What a Young Nation Needs Its Leader to Focus On

Nearly two-thirds (about 67%) of Ethiopians—on the order of 86 million people—are under thirty. This is the single fact that should organise every other. A median age of around 19 is, depending entirely on what is done with it, either the greatest developmental asset on the continent or the largest reservoir of combustible grievance in the Horn. The difference between those two futures is not made by rhetoric; it is made by a small number of concrete choices, and they are the choices on which I would ask the second mandate to concentrate. If Abiy is, as I believe, the figure currently most able to carry the architecture through, it is on these that his claim to that role will be tested.

- 1. Begin the constitutional repair, as a generation-long project.** Not a coup against the constitution, not its overnight abolition, but the patient reordering of its foundation so that the individual citizen becomes the unit of sovereignty, with rights antecedent to and protected against any group claim, while regional and cultural self-government is preserved on the UK or Swiss model. This is the work of a decade, not an electoral cycle, and the second mandate’s claim to historical seriousness rests on whether it begins the work or defers it again.
- 2. Reconstruct the army on professional rather than political foundations.** Depoliticise senior promotions; rotate regional commands on a published schedule; build a defence staff college that teaches the civil–military doctrine of accountable professional forces; subject senior appointments to parliamentary scrutiny. An army loyal to the constitution is a shield; an army loyal to the person is a sword the executive keeps at his own neck. The *unity* foundation cannot be secured by any other instrument.
- 3. Ring-fence GERD’s electrification as a strategic, not a discretionary, expenditure.** The engine powers the means only if its current reaches the industrial parks and the population. To stabilise the macroeconomy while failing to extend the dam’s power to the people would be to buy financial credibility at the price of the social contract that makes the dam politically invulnerable.
- 4. Make development broad-based, or admit it is not development.** Institutionalise the entrepreneurial-state doctrine on Temasek discipline—constitutional protection of fund assets from executive draw-down, an independent board chair with the Prime Minister stepping back, subsidiary-level transparency, published performance benchmarks—so that state capitalism is developmental rather than predatory. And answer, with data, whether the poor are subsidising the industrialist class. A collapsing middle class is a leading indicator of a rentier trajectory; it must be treated as an alarm, not an inconvenience.

- 5. Pursue the Red Sea by assertion and law—and, above all, by indispensability.** The right is inherent and not subject to foreign veto; the preferred method is negotiated access, continental coalition-building, and the patient construction of legal and commercial mechanisms—and the explicit foreclosure of the oldest temptation in regional statecraft, the conversion of an internal weakness into a foreign quarrel. But the deepest instrument is neither rhetoric nor force: it is regional gravity. In the history of statecraft, durable strategic outcomes are secured less often by the first resort to arms than by the slow accumulation of economic weight that makes a large state indispensable to its neighbours—through electricity exports, rail and logistics corridors, an industrial market the region cannot do without, food systems, and shared security. An Ethiopia that has become the indispensable node of a Horn development architecture will find that maritime arrangements evolve not as isolated territorial disputes but as components of a wider equilibrium it largely shapes. Maritime restoration, pursued in this sequence, becomes the logical outcome of a transformed balance of power rather than a revolutionary disruption of it—which is also why a war for the sea launched from a fractured domestic base would be lost twice, while patience built on internal strength may secure what impatience never could.
- 6. Empower the young as architects, not ornaments.** Gender parity in the cabinet was achieved in 2018 and rightly praised; age parity was never attempted. A country governed almost entirely by those over 45, whose median citizen is 19, is living in structural denial of its own demography. Train and deploy the young generation to drive every one of the items above, or watch them become the economic and security liability that an untrained, unheard youth bulge has been in every country that wasted it.

None of these requires a perfect leader. All of them require a leader who governs as a national executive rather than as a factional patron—which, as the whole of this article has argued, is something the constitution presently makes very hard and which is therefore, in the end, a matter of deliberate choice against the grain of the architecture. That is precisely why national support matters in the specific sense I mean it: not the support that re-elects, which is in any case assured, but the support that makes the harder choice survivable. A leader attempting constitutional repair, army reform and broad-based discipline against the resistance of every faction that profits from the status quo can only do so if a critical mass of citizens has decided to back the project of the nation over the project of the group. That backing is not delivered at a ballot box. It is delivered in a million daily acts of lawful, hard-working, non-tribal citizenship. It is the one thing no government can supply and no foreign analyst can measure, and it is the thing on which everything else depends.

13 Conclusion

The Economist is a serious magazine and *Horn Review* is a serious platform, and I have tried to give both their due. Each has hold of a real part of the truth. *The Economist* is right about the debits—the manufacturing contraction, the thin investment, the rising poverty, the centralisation, the over-representation, the hollow contest—and right that a government which cannot credibly claim to represent all its citizens has a strategic vulnerability and not merely a moral one. *Horn Review* is right about the inheritance, right that the shocks were severe and largely exogenous, right that the social investment is real and under-reported, and right that “strategic hedging” reads the Horn more soberly than “imperial ambition” does. But each, by making the man the subject, ends in a verdict the facts do not support. *The Economist*’s “imperial vision” converts a defensive sovereignty interest into an expansionist one, a constitutional defect into a personal autocracy, and a development sequence into a vanity. *Horn Review*’s “managed rupture” converts centralisation into reconstitution, precariousness into irreversibility, and the unmentioned obstacle of the constitution into a destination reachable by good intentions. They are the same evasion from opposite ends: the two available ways of not discussing the architecture.

The architecture is the whole of the matter. Measured against the four singular interests—Unity and Red Sea Sovereignty as the constitutive foundations, broad-based development anchored in democracy as the sustaining means, GERD as the engine, in the single unbroken direction Foundations → Means → Engine—the binding constraint on Ethiopia’s future is not the ambition of its Prime Minister and not the imperfection of its reforms. It is a constitution that vests sovereignty in groups rather than in persons, rewards every faction for capturing the apex rather than defending the federation, and converts the virtue of any executive into the patronage of a faction. That is the building. The election is the capstone. And it is the constitution, stupid.

What, then, of Abiy? I have been at pains not to write either a brief for the prosecution or a brief for the defence, because the four singular interests permit neither. He is imperfect, as Churchill and Roosevelt and Park and Deng and every consequential leader has been imperfect; the debits in his ledger are real and some of them are grave. But in the public eye, at this moment, there is no figure more plausibly able to carry the architecture through than the one who has already demonstrated to a fatalistic nation that transformation is possible, opened its economy, and—whatever the mixture of conviction and calculation behind it—placed the language of sovereignty, the dam, and the sea at the centre of the national conversation. That demonstration is necessary but not sufficient. It becomes sufficient only if he is willing to spend the political capital of a second mandate on the reforms that run against the grain of the constitution that elevated him: the repair of the foundation, the professionalisation of the army, the broadening of the development, the disciplined and lawful pursuit of the sea, the empowerment of the young.

And the stakes of that choice are, for him, total. History is not gentle with leaders who command the stage at the decisive hour and spend it on consolidation rather than construction. The four singular interests are, in the end, a programme to be *legislated and implemented*—written into a repaired constitution and built into institutions that outlast their author—not a mood to be sustained by speeches. A leader who had the standing to begin that work and chose instead to manage the architecture for the advantage of a faction does not enter the national memory as a founder; he enters it, if at all, as one more of the gifted men who promised a great deal, were elevated by the hopes of millions, and are remembered—when they are remembered—for the distance between what they could have built and what they left. That is the judgement Abiy now writes for himself. It is the most consequential thing the second mandate will decide, and no one else can decide it for him.

And it becomes possible only if Ethiopians give him the one form of support that no election provides: the collective consensus of a law-abiding, hard-working citizenry that has decided, at last, to be a nation of builders rather than a nation of lamenters; to abandon the monkey-habit of ethnic politics; to demand accountability *and* defend sovereignty, because these are not in conflict; and to do the slow, unglamorous, local work through which every nation we envy actually rose. That is not an imperial vision. It is the opposite of one. It is the modest, difficult, entirely achievable vision of a sovereign and united Ethiopia—owed not to the grandeur of a leader but to the discipline of a people, and held, as the Adwa generation understood, not because it was given but because it was earned.

Stand with Ethiopia

Stand with Ethiopia on unity, because without it there is no sovereignty. Stand with Ethiopia on the Red Sea Sovereignty, because it is the recovery of a right, not the seizure of a country—pursued in peaceful priority, but not peaceful exclusivity — never surrendered for want of another’s blessing. Stand with Ethiopia to build broad-based prosperity through democracy, not through the capture of the apex by one faction. Stand with Ethiopia on GERD to make the engine of urbanisation and industrialisation and reach the people, not only the parks. Finally, Stand with Ethiopia on repairing the constitution, patiently and generationally, so that the citizen—not the group—is the unit of the nation. Do these, and the question of whether the leader’s vision was “imperial” will answer itself: it was never imperial. It was sovereign, and it was united, and it belonged to the young.

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