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Leverage and Limits: What African Actors Make of the New Multipolarity

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Contents

Africa's International Relations in the Era of Multipolarity

In recent years, the international relations of African countries have been increasingly analysed through the lens of multipolarity and the growing economic, political and strategic competition between external powers. This debate started to gain prominence around 2018–19, when *The Economist* identified a "new scramble for Africa".[1] It has since intensified in the context of the COVID-19 pandemic. Russia's full-scale invasion of Ukraine finally exposed the sharp divides as Russia, on one side, and Ukraine and its Western partners, on the other, sought to mobilise African governments in pursuit of international support for their respective positions within the UN.

The world's political superpower – the US – has been in a process of relative disengagement from Africa for more than a decade now.[2] By contrast, China, India, Turkey and, to a lesser extent, Brazil and Middle Eastern countries such as the United Arab Emirates, Saudi Arabia and Qatar have expanded their presence on the continent in the areas of trade, investment, diplomatic support and security engagement. At the same time, Russia, a major player during the Cold War, has renewed its engagement, although, arguably, its activities remain more limited both in scope and in scale. The increasing presence in Africa of the BRICS – South Africa became a member in 2010, while Egypt and Ethiopia followed in 2024 – is another manifestation of today's shifting power relations and multipolarity. Similarly, the recent entry of the African Union (AU) into the G20 underscores the external recognition of Africa's importance. Moreover, it demonstrates the continent's growing ambition to shape international politics and defend its interests vis-à-vis the rest of the world.

Geopolitical Competition: A Dominant Discourse Between External Actors

External actors are themselves increasingly framing their engagement in Africa as part of the broader geopolitical competition. This is particularly evident in the case of Western countries. Ever since the first Trump administration (2017–21), the official discourse in the US has focused on China's allegedly malign role in Africa, reflecting concerns that growing Chinese influence will come at the expense of that of the US. Within the EU, competition with other powers has similarly shaped both the discourse and policymaking: once described as a "partner and competitor", China is now seen as a "systemic rival".[3] Furthermore, since the invasion of Ukraine in 2022, Russia's inroads into Africa – previously a subject of minor interest – have raised alarm bells in European capitals. For its part, the German government under Chancellor Merz has vouched to "counter Russian and Chinese influence".[4]

[1] "The New Scramble for Africa", *The Economist*, March 7, 2019.
[2] Judd Devermont, "On the Oval Office", Substack Newsletter, *Post Strategy*, May 15, 2025.
[3] European Commission and HR/VP, "Joint Communication to the European Parliament, the European Council and the Council. EU-China – A Strategic Outlook", March 12, 2019.
[4] *Verantwortung für Deutschland. Koalitionsvertrag zwischen CDU, CSU und SPD* (Berlin, 2025), 128.

While the Chinese government has generally avoided speaking of geopolitical rivalry, its actions suggest a deliberate effort to position itself as a major partner relative to other actors. At the September 2024 Forum on China–Africa Cooperation (FOCAC), for example, President Xi Jinping emphasised that the Chinese approach of modernisation without liberalism carries important lessons that could prove more useful for African partners than the experiences of other foreign actors. There is also evidence to suggest that the involvement of India, Japan and South Korea in Africa is influenced and framed, in part, with an eye to offsetting China's engagement.[5] Elsewhere, Turkish and Russian officials have sought to give their countries a competitive edge and distinguish themselves from European actors by emphasising their lack of a colonial past in Africa. Competition has also played out in multilateral arenas such as the UN.

Analyses of Africa's international relations in the new era of multipolarity often focus on the objectives, interests and strategies of outside powers, paying only limited attention to the tactical or strategic behaviour of African actors. Yet, there is great diversity among African and external actors in terms of political, economic and societal interests. Also, both the implications of multipolarity and the ways in which African actors actively use or respond to the opportunities and challenges can vary considerably across policy fields, sectors and thematic areas of engagement.

The current volume takes this diversity as its starting point, with the individual chapters looking at the various ways in which multipolarity manifests itself in Africa. It thereby offers a nuanced examination of how African actors navigate, respond to and shape the complex realities of 21st century multipolarity across different policy fields and thematic areas. Key questions addressed include: how does multipolarity affect specific policy fields and sectors? How does it reshape configurations of power, patterns of cooperation and competition in Africa? What do African actors make of the conditions of multipolarity in a given policy field or sector? For example, do they expand the policy space or do they create new constraints and challenges?

Multipolarity: Curse or Blessing?

It is widely assumed that the proliferation of external actors has led to a panoply of choice for the continent's governments. In other words, Africa is no longer bound by the limited set of options that was available to it under the Western-dominated, liberal world order. The wide variety of partners allows African actors to choose what they believe is in their best interest. As a result, the room for manoeuvre in the field of policymaking and international partnerships is increased and outcomes may improve.

This line of argument inevitably invokes greater African agency, that is, the freedom and capacity of states and collective groupings, such as the AU and the Regional Economic Communities, to define and pursue their interests within a changing global environment in a far more assertive manner than was the case until now.[6] When foreign powers are engaged in strategic competition with one another, the bargaining power of African actors further increases. Such dynamics were evident during the Cold War, when some African regimes skilfully exploited rivalries between the great powers to ensure their own political

[5] Gerda Asmus et al., "Is India the New China? Rivalries in Development Finance", *Megatrends Spotlight* 20, January 9, 2023.
[6] Fonteh Akum and Denis M. Tull, *Strategic Competition and Cooperation in Africa*, Megatrends Policy Brief 13 (Megatrends Afrika, February 2023), 7.

survival. Today, the renewed strategic competition between external powers points to a similar dynamic.

However, amid the growing political polarisation, African governments and societies could be at risk of being forced to "take sides". Indeed, this is already evident both from the pressure to support the European stance on Russia's invasion of Ukraine and from European and Russian engagement in the Sahel. Thus, multipolarity can also diminish bargaining power as siding with one actor implies reduced access to resources from and investments by other actors.

The individual chapters in this volume analyse these dynamics across a range of issue areas, policy fields and regional perspectives. The main thrust is that the implications and dynamics of multipolarity vary greatly from field to field and sector to sector. In short, they are much more nuanced than the general political discourse on "geopolitical rivalry" suggests. Moreover, the contributions show that African actors actively leverage the opportunities that arise through the growing interest of various external actors. At the same time, dwindling willingness among those actors to find cooperative solutions has a considerable bearing on the search for ways to promote sustainable economic and societal development across the continent over the long term.

Findings from the Chapters: Facets of Multipolarity

A common thread running through all the chapters in this volume is that in Africa, multipolarity is not simply a tale of the decline of the West and the rise of competitors like China, Russia, the UAE and Turkey. Rather, there is a complex reconfiguration of power relations under way in which African governments, institutions and societies have their say in negotiating the terms of engagement with the rest of the world, despite the undeniable persistence of asymmetries in terms of material power.

However, this basic fact is not always acknowledged, as Lisa Tschörner and Denis Tull demonstrate in their chapter on the narrative of a vacuum in the Sahel. Widespread in European and US policy circles and media reports, the narrative suggests that the Western withdrawal is creating a void that competitors are rushing to fill; thus, it focuses squarely on what foreign actors are doing in the Sahel and relegates Sahelian actors to mere figures on a chessboard, demonstrating the pervasiveness of outdated tropes. The authors' critique establishes one of the central themes of the volume: the necessity of taking African agency seriously. Rather than a vacuum being created or external impositions being accepted, they argue, partnerships are being reconfigured in the Sahel in a way that reflects the strategic choices of local actors operating in specific domestic political contexts, even if local decision-making is taking place amid internal political crises and pervasive uncertainty.

The Sahel is hardly an exception to what is a broader trend, namely, the transformation of security partnerships under the conditions of multipolarity. Wolfram Lacher, Ann-Marie Verhoeven and Julia Fath document the fundamental change in foreign intervention patterns since the mid-2010s. Those patterns are characterised by a decrease in the number of Western and multilateral peacekeeping operations and an increase in the number of interventions by non-Western powers, which has created "a continent-wide market for foreign security assistance", allowing regimes to shop for external support without being constrained by traditional relationships. As the authors explain, some African actors use multi-alignment strategies to ensure their own interests are met. This complex interplay suggests that external support can, in fact, make conflicts harder to resolve. While partner-

ships may provide lifelines for ailing regimes – and sometimes insurgent groups – there is little evidence to date that they make war-torn African countries more peaceful.

Unlike external interventions in conflict dynamics, the engagement of external actors in promoting democracy across Africa is perceived positively on the whole, as shown in the chapter by Christine Hackenesch and colleagues. Indeed, survey data from seven African countries indicate that African citizens welcome the involvement of external actors in the promotion of democracy in Africa and view both the EU and China as helping to raise the level of democracy on the continent. It appears that global discourse about systemic rivalry has found little resonance with African societies – at least for the time being. Moreover, African citizens do not seem to view China as contributing towards autocratization, nor do they appear to contest the EU's engagement on democracy, contrary to the Sahel, where the EU and its member states currently struggle a hostile discourse.

As regards foreign trade and market access, the picture is more ambivalent. Rolf J. Langhammer discusses how US unilateralism under Trump ("reciprocal tariffs"), the looming end of the African Growth and Opportunity Act (AGOA) and the cuts in development aid all pose risks. While this reduces African exporters' room for manoeuvre, it also illustrates how external rivalry creates both opportunities and constraints: the US may tighten access, but the EU can respond with reforms that expand Africa's market access and resilience. Langhammer's analysis thus underscores a central theme of this volume: multipolarity does not automatically translate into greater African agency; rather, agency must be actively defended and renegotiated in the face of shifting external pressures and the competing agendas of global players.

The growing number of opportunities, albeit not without constraints, is reflected in the idea of a "market of partnerships" in the chapter by Karoline Eickhoff, Linda Maokomatanda and Rainer Thiele. Their analysis of China's continued dominance in the African infrastructure sector demonstrates that despite European initiatives like the Global Gateway (established largely as a counteroffer to compete with China), Beijing remains the undisputed heavyweight in the field. And, as the authors go on to show, this is explained not by geopolitics but by the choices of decision-makers (in this case, those in East Africa) who value Chinese cooperation for its "speed, scale and discretion". These are all factors that local elites hope will yield short-term economic and political gains for both themselves and their local constituencies.

Choice amid competition is also one of the main findings of Phemelo Tamasiga and Emmanuel Matambo's examination of Africa's critical minerals sector, which has gained immense importance in the context of the global energy transition. The authors contend that the race for critical minerals has increased the room for manoeuvre of African governments, as evidenced by the export bans imposed on unprocessed minerals and the state-led reviews of existing mining contracts in many countries. In this instance, international competition has offered African countries the opportunity to move beyond raw-material export dependency towards local added value. But at the same time, the bargaining power of governments can vary.

A similar picture emerges from the chapter by Benedikt Erforth and Hangwei Li on digital policies in Africa. In the digital realm, national governments have a wide choice of competing offers from China, the US, the EU and India, enabling them to expand their options and assert their interests. Again, the "market of partnerships" idea suggests that the choices made are premised neither on politics nor on exclusivity. Similar to other fields, "multi-alignment" seems to be a privileged approach, although it may result in what others call "diversified dependency" or policy incoherence.

Another major theme of this chapter is that while strategic international competition may enhance African opportunities, more often than not African actors see no reason to play a part in this competition. Hence the relevance of the market metaphor. That the prism of geostrategic competition is embraced by foreign competitors but not necessarily by African actors is also clearly demonstrated in Biruk Terrefe's ethnographic account of Addis Ababa's urban development, which is an illuminating counterpoint to geopolitical analyses that focus on competition and fragmentation. By examining infrastructure developments in the capital of Ethiopia, he shows from the bottom up how multipolarity does not manifest itself as polarisation among competing blocs. Rather, the city is a site where "new forms of hybridisation and a blending of global actors, their ideologies and practices" are manifest – an outcome that results from a local development-oriented pragmatism that goes beyond geostrategic dividing lines.

Conclusion and Implications

In Africa, multipolarity is neither a straightforward opportunity nor a uniform constraint, as the individual chapters in this volume show. Across a range of areas that includes security, infrastructure, critical minerals, digital governance, urban development, public opinion and trade, a highly differentiated picture is emerging. African actors are not passive receptacles for the strategies and agendas of external actors but active players who exploit competition to advance their own goals.

At the same time, multipolarity generates new risks. Great power rivalries can close options to the same extent that it can open them. Strategic competition often narrows the room for cooperative problem solving, while unilateralism, sanctions and conditional alliances can create volatility, to which African governments and societies must constantly adapt. Thus, agency expands and contracts depending on how external rivalries align with domestic political and economic priorities – and, at times, the external constraints can change abruptly.

Three overarching lessons can be drawn from this. First, analyses of Africa's international relations must avoid framing the continent merely as an arena of competition. Multipolarity is shaped as much from within as from without, and African capacities are central to how multipolarity manifests itself across the continent. Second, the external partners that remain most relevant could be those that are able to respond flexibly to African priorities, thereby helping African countries carry out their agendas and at the same time focusing on long-term rather than short-term geopolitical positioning. And third, such an approach is required because many African actors – governments and non-state actors alike – see little necessity to participate in conflicts and competition waged by others.

Multipolarity will remain a defining feature of Africa's international relations. Whether it becomes a source of agency depends less on the strategies of competing powers than on what African actors make of it.

No Void in the Sahel: Why the "Vacuum Narrative" is Misleading

Lisa Tschörner and Denis M. Tull

The substantial military, diplomatic and economic reduction of Western engagement from the central Sahel region (Burkina Faso, Mali and Niger) since 2023 has led a flurry of observers to warn of an emerging vacuum that competing external powers are rushing to fill. Presented as a matter of fact, these allegations have led to policy prescriptions urging Western actors to reengage with states in the Sahel region. We argue that this "vacuum narrative" is tantalisingly simple and leads to misleading conclusions. It misreads current dynamics as conjunctural and misconstrues probabilities of containment and alignment under multipolar conditions. Most importantly, it writes Sahelian actors out of the picture insofar as it tends to consider them as pawns on a chessboard of great power politics, with little agency of their own. The narrative is ill-equipped to lay the groundwork for effective European reengagement with the Sahel. A strategic and long-term European approach will need to re-centre the analysis on actors and dynamics in the Sahel itself instead of focusing primarily on those of real or alleged competitors.

The Vacuum Narrative: What is at Stake?

The "vacuum narrative" has become omnipresent within Western policy circles and media outlets analysing recent political developments in the Sahel, in particular in the wake of the series of military coups there (2020 to 2023).[1] At its core, the narrative suggests that a sharp downgrading or wholesale withdrawal of Europe provides competitors with the space to extend their influence in the region.[2] It reflects a view of the world in which strategic competition plays out as a zero-sum game.

The narrative is primarily informed by worries over Russia's rapid inroads in the Sahel since late 2021, with Mali being the major case in point.[3] To some observers, Russia is a beneficiary of the souring relations between the Sahel and Europe. To others, it is even the driving force behind the disruption, having pushed Sahelian juntas to divorce from Europe.

These concerns are not far-fetched. There is ample evidence of Russian misinformation and disinformation campaigns that target European states and interests in the region. More importantly, Russian activities in the Sahel, intentionally or not, are exacerbating instability and insecurity in the region. These dynamics are increasingly affecting neighbouring West African states, with potential negative repercussions for Europe. Some even assume that

[1] See, for example: Sylvie Kauffmann, "Russia is Filling the Vacuum Left by the West in the Sahel", *Financial Times*, April 12, 2025; The Editorial Board, "America's Anti-Terror Exit From Niger", *The Wall Street Journal*, August 10, 2024; Kate Barlett, "Sahel Vacuum Provides Opportunities for China, Analysts Say", *VOA News*, January 13, 2025.
[2] For an overview of recent non-Western engagement see: Nina Wilén, *Stepping up Engagement in the Sahel: Russia, China, Turkey and the Gulf States* (Egmont Policy Brief 375, Brussels, 2025).
[3] The first contingent of Wagner combatants arrived in Mali in December 2021, swelling intermittently to 2,000. In June 2025, Wagner operations were taken over by the Afrika Corps, an organisation controlled by Russia's Ministry of Defence. In parallel to Wagner, official military cooperation between Russia and Mali has also been augmented since 2021.

Moscow may seek to destabilize Europe by intentionally increasing migration flows from the Sahel into Europe.[4]

To an extent, the "vacuum narrative" reflects also a long-term concern of European policymakers over its allegedly declining international standing in terms of soft power, trade, investment, diplomacy and security cooperation. While the African continent is quickly growing out of the postcolonial relationship, accelerated by transformative mega-trends (urbanisation, demographics and digitalisation) and by an increasingly multipolar world, Europe is struggling to adapt to the changing context. In this sense, the "vacuum narrative" is popular because it finds straightforward explanations for Europe's possibly diminishing influence in the actions of others, namely strategic competitors. Thus, this narrative also sidesteps difficult questions about Europe's own responsibilities and mistakes, past and present, while suggesting a rationale for a reinvigorated foreign policy towards the African continent.

Flawed Assumptions

Nonetheless, the "vacuum narrative" offers a flawed reading of current internationalised political dynamics in the Sahel. First, the engagement of non-Western states in the region overall is not a reaction to the recent Western withdrawal.[5] On the contrary, the contours of an emerging multipolarity have been evident in the region for a decade, if not longer. The extraordinary, heavy European stabilisation interventions since 2012 may have obscured this broader trend. Most non-Western states have incrementally and steadily increased their footprint in the region, despite and in parallel to the presence of the West.[6] Some, like China and Turkey, have established wide-ranging, strategic and long-term forms of engagement.[7] Although more restricted in its approach, Russia has become an important diplomatic and security partner to the juntas in the Sahel. Still, it bears emphasis that the nature and extent of its cooperation differ significantly across the region. To date, Mali remains the outlier with an outsized kinetic military approach and a substantial troop presence.[8] The drivers of non-Western engagement are not uniform. While Russia seeks to counter Western influence in West Africa, others (i.e. China and Turkey) have a broader footprint that is on par with their international ambitions.

Second, the tendency of the "vacuum narrative" to portray a tidal wave of growing influence of competitors overlooks the fact that non-Western actors also face considerable risks in the Sahel, similar to Europeans. The region's pervasive insecurity and instability render any opportunistic engagement difficult. Kidnappings by non-state armed actors have increasingly targeted non-Western foreigners (e.g. Chinese, Indian, Russian and Moroccan), while Russian-led military operatives are suffering considerable losses against insurgent groups in Mali. Moreover, messy local politics and the juntas' populist political

[4] Philippe Bernard, "By Sponsoring Coups in the Sahel, Russia has Acquired a New Hold on Europe: Emigration", *Le Monde*, March 28, 2024; See also: Nette Nöstlinger, "We Must Work with Libyans to Stop Putin Weaponizing Migrants, Top EU Official Says", *Politico*, July 22, 2025.
[5] Jevans Nyabiage, "How China is Filling Void Left by France, US with Stronger Military Ties in Africa's Sahel", *South China Morning Post*, February 25, 2025.
[6] Lina Benabdallah and Daniel Large, *China's Development-Security in Practice: The Case of Mali,* Working Paper 40 (China-Africa-Research Initiative, 2020).
[7] On Turkey, see: Federico Donelli and Brendon J. Cannon, "Beyond National Boundaries: Unpacking Türkiye's Role in the Sahel and Beyond Through Geopolitical Imagination", *Geopolitics* (2025): 1–25.
[8] Global Initiative Against Transnational Organized Crime, *After the Fall: Russian Influence on Africa's Illicit Economies Post-Wagner* (Geneva, 2025).

decision-making create considerable uncertainty and unpredictability for all outside powers.

Multipolarity and Domestic Political Struggles

The biggest flaw of the "vacuum narrative" is that it tends to write Sahelian actors out of the picture.[9] Squarely focusing on Europe's strategic competition with non-Western rivals reduces the governments and populations of the Sahel to mere objects of the whims and designs of international actors. However, their agency in shaping foreign relations matters. African elites strategically engage with the international system to enhance their domestic power and resources, rather than passively accepting external influences. Historically, they have long been accustomed to use asymmetrical international relations for their own political benefit.[10] A cursory glance at the past decade demonstrates that government elites, militaries and insurgents in the Sahel have significant capacity to defend their own interests and, if need be, to frustrate the objectives of outside actors, Western and non-Western players alike. For example, to presume, as some do, that Sahelian juntas are Russian puppets, hardly does justice to local agency in reality.

Instead of creating a vacuum that non-Western powers are exploiting, military coups in the Sahel have accelerated a reconfiguration of partnerships. Multipolarity and enhanced international competition have offered military regimes in the Sahel more room to manoeuvre. Yet, the way they engage with multipolarity is determined by distinct domestic conditions and interests. Finding the right balance between foreign policy goals and domestic power politics is not a foregone conclusion for the military juntas.[11] In the context of the central Sahel, fragile elite pacts and permanent crisis management impose constraints on attempts to strategically exploit multipolarity in a straightforward fashion. Power and authority of current rulers is precarious. They face significant challenges in terms of maintaining internal cohesion among coup plotters, ensuring that the interests of powerful military organisations (e.g. special forces, praetorian guards and gendarmerie) are taken into consideration, while also mobilizing the support of armed militias, political entrepreneurs and civil society groups, to avoid the emergence of competing centres of power that could threaten regime stability.[12] This is especially the case when foreign policy choices have an impact on national security arrangements, creating possibilities for contestation and competition. As frictions over the choice and nature of partnerships persist, any commitment comes with the risk of antagonizing political allies that jockey for power and influence in the context of unstable alliances. For instance, while there may be supply-side explanations for Russia's uneven footprint in the Sahel (i.e. Moscow's limited capacities), demand-side explanations, such as diverging views inside ruling military government coalitions, appear to matter just as much. In other words, the nature and extent of partnerships is not only determined by outside actors and their offers, but also by the intricacies, possibilities and constraints of local politics.

[9] Akum and Tull, *Strategic Competition and Cooperation in Africa*.
[10] Jean-François Bayart, "Africa in the World: A History of Extraversion", *African Affairs* 99, no. 395 (2000): 217–67.
[11] Wolfram Lacher, *Chad Navigates Multipolar Disorder. The Perils of Playing Geopolitics for Regime Survival*, Megatrends Policy Brief 19 (Megatrends Afrika, 2023).
[12] On civil society, see: Lena Gutheil and Lisa Tschörner, *Working with Civil Society in Authoritarian Contexts? The Case of Niger*, Megatrends Policy Brief 28 (Megatrends Afrika, October 2024).

Implications for Germany and Europe

Scrutinizing the strategies and actions of competitors is a necessary task for any government. However, Western advocates of the "vacuum narrative" tend to misread how multipolarity plays out in post-coup Sahel, ignoring what Sahelian actors make of it.

Wanting to re-engage in the region with the purpose to outcompete non-Western rivals is a risky move informed by short-term thinking. Hoping to elicit cooperation from fragile local regimes – whose best bet for political survival is to attract foreign support and benefit from increased international competition – Europeans run the danger of miscalculations and adverse unintended consequences. The more Europeans make strategic competition and containment the centre piece of their Sahel narrative, the more they expose themselves to being instrumentalized by local actors. The overriding European concern with international competitors also sends the wrong message to sovereignty-minded African interlocutors, namely that their perceptions and political visions are not taken seriously in European capitals. This is hardly a propitious base to re-establish credible partnerships with the states of the Sahel.

There are many sound reasons why Europe should stay engaged in the Sahel despite – not because of – rivals and competitors. Europe has strategic interests in the region, ranging from development objectives to political and security concerns. The political landscape in the Sahel, like the rest of Africa, will remain crowded by a myriad local and international actors. Europe's influence will necessarily remain limited. But if decision-makers act strategically based on an informed reading of the political context, they can have an impact on the region's political trajectory and contribute to its longer-term stability. Taking the interests and perspectives of Sahelian actors into account is a prerequisite, although it does not mean to appropriate them. For better or worse, this includes not only current rulers and actors in the security sector at large, but also politically relevant actors across society, including religious leaders that are indispensable to establish durable national political settlements.

Re-shifting the focus on domestic actors is not a means to downplay concerns about the influence of authoritarian regimes such as Russia. Yet, their role should not be inflated.[13] Russia's strongest selling point, namely security and military cooperation, is currently facing a stern test in Mali that may ultimately do considerable damage to its credibility in the region.

At present, European policymakers are pondering how to engage with the Sahel. We have argued that the "vacuum narrative", albeit pervasive, does not provide a compelling foundation for a rational and effective approach. Instead, policymakers in Europe should take a step back and determine why they want to re-engage the Sahel. A clear-headed understanding of interests and objectives is a prerequisite to design policies able to underpin new or reinvigorated cooperation with the region.

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[13] Will Brown, *The Sweating Bear: Why Russia's Influence in Africa is under Threat* (European Council on Foreign Relations, October 9, 2024).

The Changing Face of Foreign Intervention in African Conflicts

*Julia Fath, Wolfram Lacher and Ann-Marie Verhoeven**

The past decade has witnessed a fundamental change in how foreign powers engage with conflicts on the African continent. Since the end of the Cold War, foreign intervention in African conflicts had generally taken the form of multilateral peacekeeping forces, French and United States (US) counterterrorism operations, as well as European capacity building of African armies. The advent of multipolarity has manifested itself in a rapid decline of all three of these types of interventions and, since around 2015, in the growing role of non-Western powers, most notably the United Arab Emirates (UAE), Russia and Turkey.
This article first presents a visualization of these changing patterns of foreign intervention in major African intrastate conflicts since 2011.[1] It then argues that the retreat of Western powers and multilateral peace operations as well as the concomitant rise of interventions by non-Western powers have contributed to growing levels of violence on the continent. The availability of alternative security partners has also created more favourable conditions for military coups. In two cases, these new patterns have led to proxy wars between foreign powers – a phenomenon not seen in Africa since the end of the Cold War. Most evidence to date suggests that the newly intervening powers have had as little success as Western states in helping their African allies stabilize their hold on power against insurgencies.

Changing Patterns of Foreign Intervention

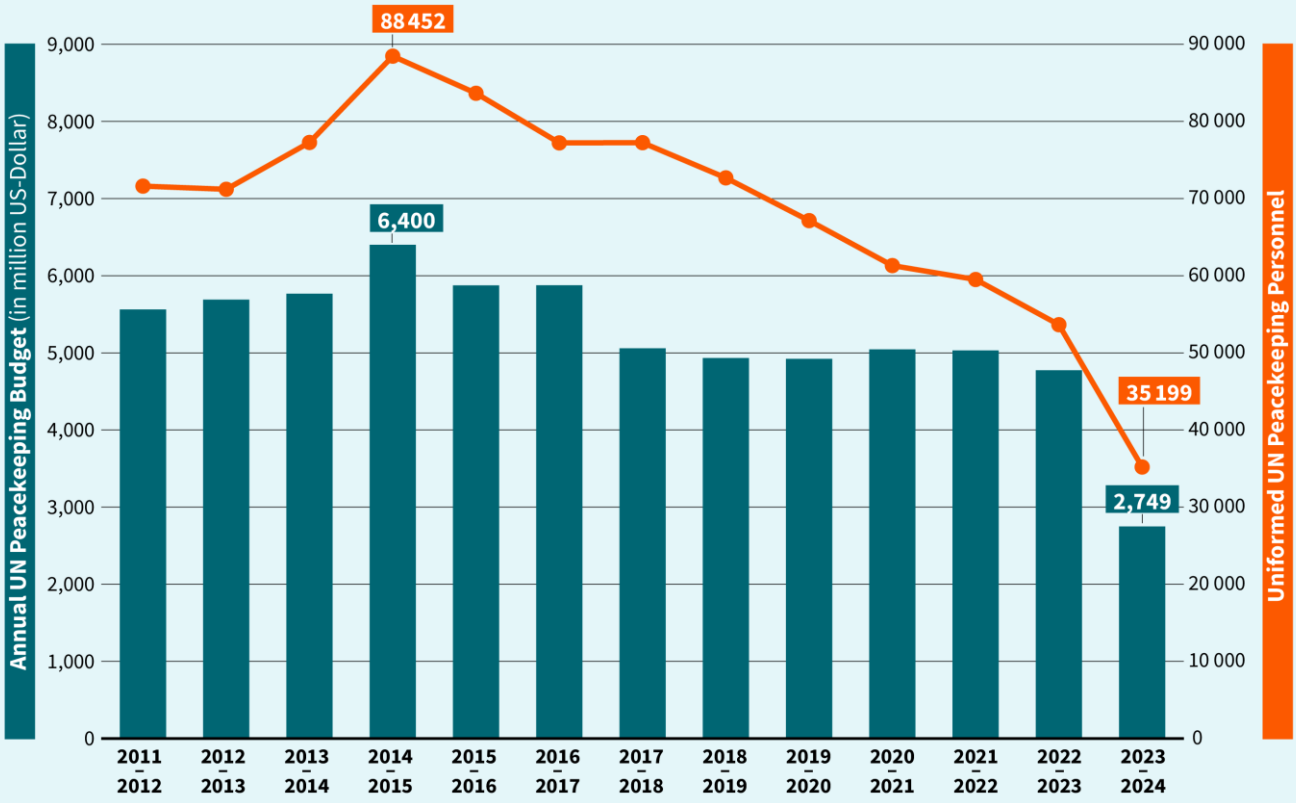
Prior to the mid-2010s, patterns of foreign engagement in African conflicts were largely consistent across the continent. Such engagement included several standard components in varying constellations. First, multilateral peace operations were deployed to back up peace agreements. Second, since the early 2000s, the US and then France cooperated with a number of African governments to fight jihadist groups in several subregions. Third, states

* The authors would like to acknowledge the tremendous effort made by Andrea Sperk, Mark Schrolle, Yussuf El-Banna, and Ida Büsch in supporting the research. Further we would like to express our gratitude to Daniel Kettner, Arthur Buliz and Christoph Baron for their continued support, and to Niko Wilkesmann for designing the visuals.
[1] The cases selected include all African intrastate conflicts from 2011 to 2024 in which the number of fatalities, as recorded by Uppsala Conflict Data Program (UCDP), crossed the threshold of 1,000 in at least one year within this time period, thereby meeting the definition of war according to the UCDP. The data presented in this analysis are the UCDP high estimates. As obtaining exact data on conflict-related events can be extremely difficult, the numbers of battle-related deaths should be interpreted as baseline figures. The Central African Republic was included because UCDP fatalities figures for 2013 (high estimate 488) significantly underestimate documented conflict-related deaths. Around 1,000 people were killed in the capital Bangui on December 5–6th, 2013 alone, in addition to numerous other events during that year in which dozens to hundreds of people were killed.
See: The Office of the High Commissioner for Human Rights, *Report of the Mapping Project documenting serious violations of international human rights law and international humanitarian law committed within the territory of the Central African Republic between January 2003 and December 2015* (May 2017); United Nations Security Council, *Report of the Secretary-General on the situation in the Central African Republic* (December 2013), S/2013/787, https://docs.un.org/en/S/2013/787; Peter Bouckaert, "'They Came To Kill' Escalating Atrocities in the Central African Republic", Human Rights Watch, December 18, 2013.
For the UCDP data, see Shawn Davies, Therése Pettersson, Margareta Sollenberg and Magnus Öberg, "Organized Violence 1989–2024, and the Challenges of Identifying Civilian Victims", *Journal of Peace Research* 62, no. 4 (2025).

that hosted peacekeeping missions and/or counterterrorism operations also became recipients of EU capacity-building efforts. By the early 2010s, this triad of foreign intervention reflected a shift from state-building efforts towards stabilization and the delegation to African militaries – including in the domain of peace operations and stabilization missions, which were increasingly conducted under the aegis of the African Union, sub-regional organisations or by ad-hoc coalitions such as the G5 Sahel states, while being funded through the United Nations (UN) system or by Western states.[2]

By the mid-2010s, widespread disillusion about the limited success of Western and multilateral interventionism set in – both in Western policy circles and among African governments and the public. The budgets and headcount of UN peacekeeping operations in Africa peaked in 2014–15 and have since consistently declined (see Infographic 1).

UN Peacekeeping in Africa: Budget and Personnel, 2011–2024



Note: Personnel are counted as military observers, staff officers, troops, and police. Civilians and UN volunteers are excluded.

Sources: Benjamin Petrini and Erica Pepe, 'Peacekeeping in Africa: From UN to Regional Peace Support Operations', IISS, March 2024. https://www.iiss.org/online-analysis/online-analysis/2024/03/peacekeeping-in-africa-from-un-to-regional-peace-support-operations/, United Nations, General Assembly Reports A/66/592, A/67/599, UN Press Releases GA/11110, GA/AB/4020, GA/11256, Department of Public Information DPI/2579/Rev.1, DPI/1634/Rev.140, and Department of General Communications DGC/1634/Rev.274 and DGC/1634/Rev. 286.

Infographic 1: UN Peacekeeping in Africa: Budget and Personnel, 2011–2024

Around the same time, new external actors began intervening in conflicts on the continent. The UAE and Turkey began providing security assistance in 2010 and 2011, respectively, to different actors in Somalia. In 2014, the UAE conducted air strikes and provided arms in support of armed groups in Libya allied with Khalifa Haftar. In 2019, the Libyan civil war became fully internationalised: the UAE and Russian Wagner Group supported Haftar's Tripoli offensive, while Turkey backed the government in Tripoli. A year before, the Wagner Group had already begun providing assistance to the Bashir regime in Sudan and the

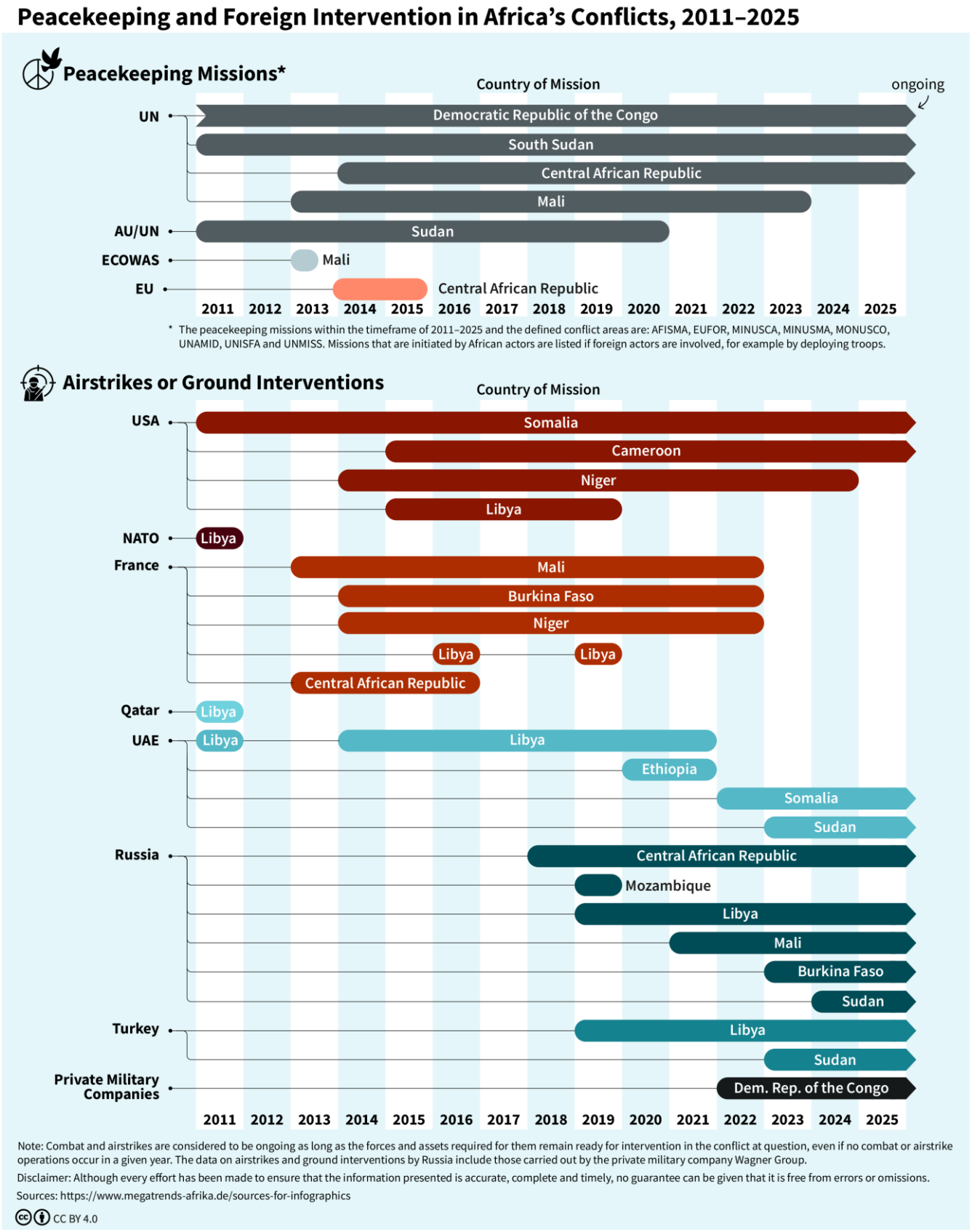
[2] Marie-Louise Clausen and Peter Albrecht, "Interventions since the Cold War: From Statebuilding to Stabilization", *International Affairs* 97, no. 4 (2021): 1203–20.

government of Faustin-Archange Touadéra in the Central African Republic (CAR).[3] Similar interventions have followed since. The UAE, Turkey and Iran have deployed drones in Ethiopia's Tigray war and on opposing sides in Sudan's civil war since 2023.[4] Russia – first through the Wagner Group, then through its army – has gone on to provide military assistance to both sides in Sudan's civil war and to the military junta in Mali, as well as to a lesser extent to those in Niger and Burkina Faso.[5]

The growing interventionism by these non-Western powers contributed substantially to the withdrawal of Western states and multilateral organisations from conflicts on the continent. In the Sahel states, Russian-backed military leaders compelled the departure of French and US forces, the UN Mission in Mali, as well as most European capacity-building missions.[6] In Libya and Sudan, neither Western states nor multilateral institutions could play any meaningful role in containing conflicts, owing to divisions in the UN Security Council – not least due to the Russian role in both conflicts – as well as Western powers' reluctance to exert pressure on their Emirati allies.[7] For the same reason, the newly intervening powers also routinely ignored UN arms embargoes.[8]

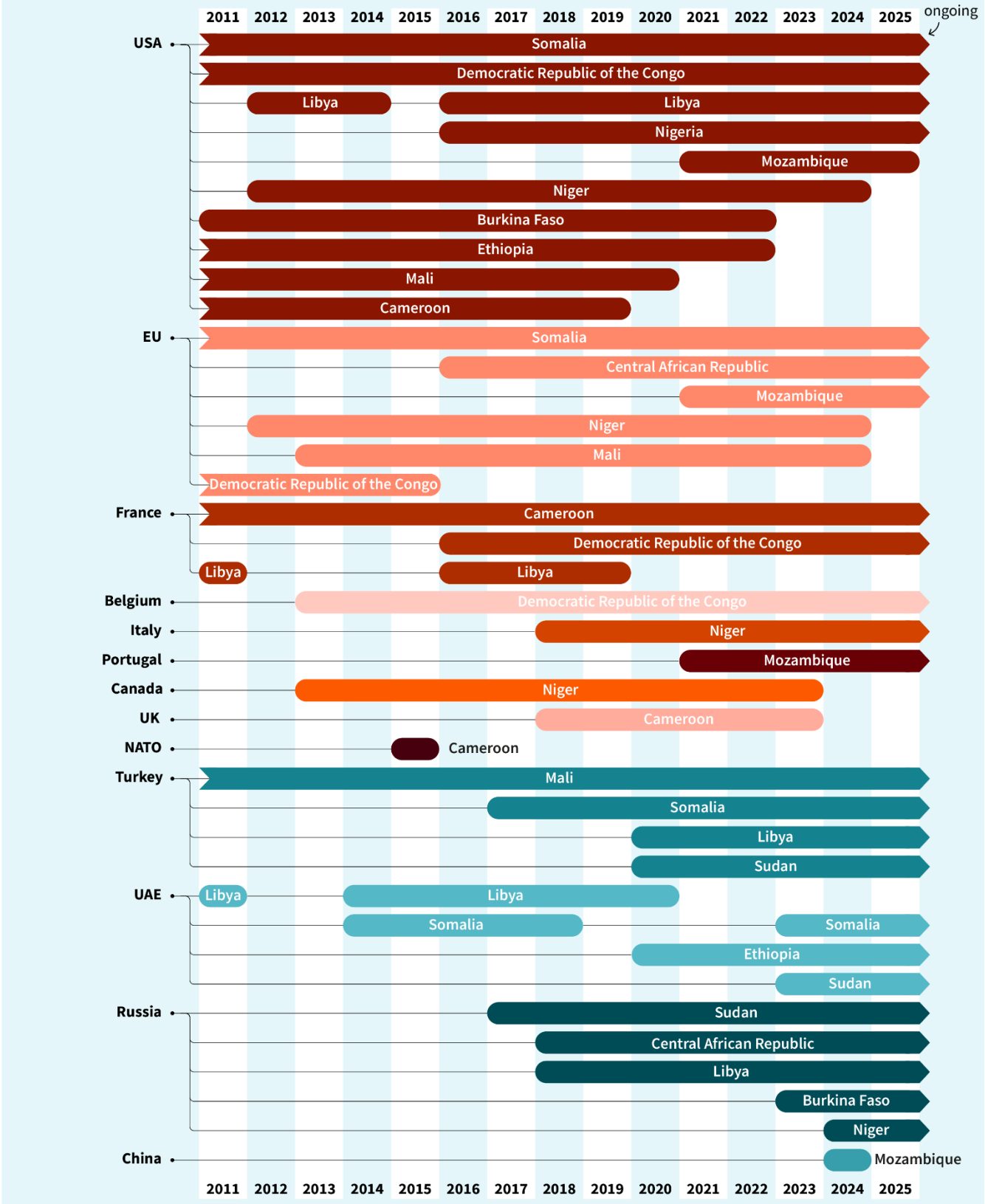
When combined, these patterns become visible in Infographic 2 as a gradual decrease in UN and UN-backed peacekeeping operations as well as combat missions and airstrikes by Western states, in combination with a proliferation since 2019 of combat missions and airstrikes by the UAE, Turkey and Russia.[9] Infographic 3 shows similar patterns regarding foreign support to African belligerents in the form of training or finance.

[3] Wolfram Lacher, *African Conflicts amid Multipolarity: Implications of a Changing Actor Landscape*, Megatrends Policy Brief 3 (Megatrends Afrika, 2022).
[4] Declan Walsh, "Foreign Drones Tip the Balance in Ethiopia's Civil War", *The New York Times*, December 20, 2021; Katharine Houreld and Hafiz Haroun, "Sudan's Civil War Fueled by Secret Arms Shipments from UAE and Iran", *The Washington Post*, October 15, 2024.
[5] Julia Stanyard, Thierry Vircoulon and Julian Rademeyer, *The Grey Zone. Russia's Military, Mercenary and Criminal Engagement in Africa*, Research Report (Global Initiative Against Transnational Organized Crime, February 2023); Julia Stanyard, *Mercenaries and Illicit Markets. Russia's Africa Corps and the Business of Conflict* (Global Initiative Against Transnational Organized Crime, February 2025).
[6] "France's Bitter Retreat from West Africa", *The Economist*, February 1, 2025; Ishaan Tharoor, "The U.S. is in Retreat in a Crucial Part of the World", *The Washington Post*, April 24, 2024.
[7] Denis M. Tull, *UN Peacekeeping in Africa: The End of a Cycle? – Between Changing Warfare, Impossible Mandates and Geopolitics*, Megatrends Working Paper 7 (Megatrends Afrika, 2023); Sara Hellmüller and Bilal Salaymeh, "Transactional Peacemaking: Warmakers as Peacemakers in the Political Marketplace of Peace Processes", *Contemporary Security Policy* 46, no. 2 (2025): 312–42.
[8] Declan Walsh, "In Libya, Toothless U.N. Embargo Lets Foreign States Meddle With Impunity", *The New York Times*, February 2, 2020; Declan Walsh and Christoph Koettl, "How a U.S. Ally Uses Aid as a Cover in War", *The New York Times*, September 21, 2024.
[9] Airstrikes have been attributed to a foreign state where sourcing suggests that this state has not only provided aircraft – whether combat drones or fighter jets – but also its operators. In cases in which there is no evidence for foreign operators or where sourcing suggests that local operators pilot foreign-supplied drones, the provision of aircraft has been categorized as arms deliveries. Combat missions carried out by foreign mercenaries are attributed to a foreign state in which there is substantial evidence that this state helped deploy mercenaries to an African conflict to support a local belligerent, such as in the case of Syrian fighters deployed by Turkey in Libya or Colombian mercenaries deployed by the UAE in Sudan. Where mercenaries have been hired by a local belligerent without foreign state support, this is categorized as activity by a private military company.



Infographic 2: Peacekeeping and Foreign Intervention in Africa's Conflicts, 2011–2025

Foreign Actors' Support to Parties in Africa's Conflicts, 2011–2025



Note: All of the visualized countries support governments or belligerents in African conflicts by carrying out one or more of the following actions: providing logistical, technical or reconnaissance support; offering military/security training, conducting military consultancy services; concluding an agreement on military cooperation or partnership; or providing military assistance/equipment.

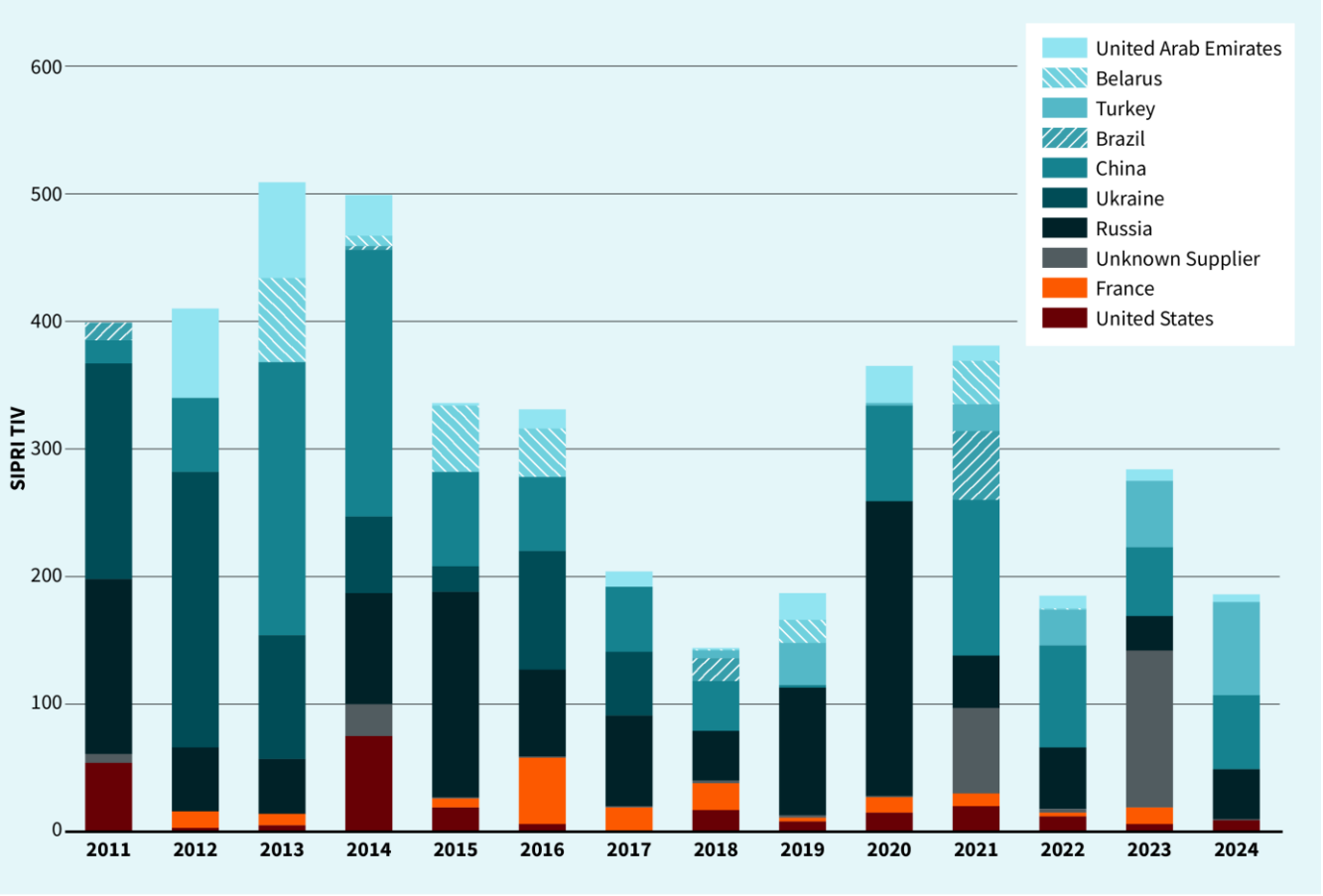
Disclaimer: Although every effort has been made to ensure that the information presented is accurate, complete and timely, no guarantee can be given that it is free from errors or omissions.

Sources: https://www.megatrends-afrika.de/sources-for-infographics

Infographic 3: Foreign Actors' Support to Parties in Africa's Conflicts, 2011–2025

Infographic 4 indicates that the Western withdrawal from African conflicts was also reflected by a decline in arms shipments. While the total volume of arms deliveries decreased over time, since 2019 no Western state has been among the three largest suppliers to the selected African conflicts. Instead, large quantities of arms have been delivered that cannot be directly attributed to any supplier. This data gap can most likely be attributed to the risk of reputational damage or the fact that arms deliveries violate UN arms embargoes and are therefore kept secret.

Ten Major Global Arms Suppliers to Africa's Deadliest Conflicts, 2011–2024



The Top Three Arms Exporters to Africa's Deadliest Conflicts, 2011–2024

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Top 1	Ukraine		China		Russia	Ukraine	Russia				China		unknown	Turkey
Top 2	Russia	UAE	Ukraine	Russia	China	Russia	China		Turkey	China	unknown	Russia	China	
Top 3	USA	China	UAE	USA	Belarus	China	Ukraine	France	UAE		Brazil	Turkey	Russia	

Disclaimer: The trend-indicator value (TIV) measures the volume of international transfers of major conventional weapons using a common unit; the latter is based on the known unit production costs of weapons. For weapons without known costs, comparisons are made based on size and performance, electronics, (un-)loading arrangements, engine, armament and materials and production year. Used weapons are valued at 40 per cent of new, while refurbished or modified ones are valued at 66 per cent.

 Source: Stockholm International Peace Research Institute (SIPRI) Arms Transfer Database, https://doi.org/10.55163/SAFC124

Infographic 4: Ten Major Global Arms Suppliers to Africa's Deadliest Conflicts, 2011–2024

How African Military Actors Make Use of Multipolarity

The advent of a new set of foreign powers willing to supply arms and intervene to support their allies clearly altered the calculations of African governments, military officers and rebel leaders.

First, the availability of foreign support from the newly intervening powers has doubtlessly contributed to the eruption of major conflicts by leading belligerents to calculate that they could gain the upper hand. To resort to counterfactuals: during the 2000s, Libya's Khalifa Haftar, Ethiopia's Abiy Ahmed and Sudan's Mohamed Hamdan Dagalo would have had far greater difficulty in obtaining foreign backing for their war efforts, and pressure from Western states and UN sanctions would have weighed more heavily on their decision-making. The backing all three enjoyed from the UAE strengthened their position vis-à-vis their domestic political rivals. Emirati support therefore could only have encouraged them to go to war against Tripoli, Tigray and the Sudanese Armed Forces and to continue these wars even when a rapid military victory failed to materialize. Foreign support from these actors therefore has also made conflicts harder to resolve, as is most evident in the case of Sudan.

Second, for African governments facing rebel groups, Russian support in particular has opened up opportunities for more ruthless counterinsurgency. In CAR, Russian backing allowed Touadéra to confront rebel groups militarily rather than negotiate, while in Mali it enabled military leaders to dismiss the longstanding insistence on the Algiers Peace Agreement by Algeria and France and to wage war against northern Malian rebels. In both countries, the shift from Western support to Russian assistance also prompted a radicalisation of counterinsurgency warfare, with frequent reports of atrocities by the Malian and CAR armies or their Russian allies.[1] In both cases, governments apparently felt empowered to wage war without any regard for international humanitarian law since they no longer had to consider potential concerns of Western partners.

Third, receding Western influence and the availability of alternative security partners has improved the chances of success for prospective putschists. To be sure, Western states helped create favourable conditions for coups, including through their heavily security-focused approach to the crises in the Sahel states which helped empower the military. Moreover, the international norm ostracizing military coups had already come under increasing pressure before the advent of the newly intervening powers. Both Western governments and the African Union had already undermined their own commitment to that norm with their lenient reactions to the first of two successive military takeovers in Mali (August 2020) as well as those in Chad (April 2021) and Sudan (October 2021).[2]

Subsequently, however, a pattern emerged whereby African coup leaders reacted to Western condemnation of their takeovers by ejecting French and US forces while welcoming assistance from non-Western states.[3] To military officers in neighbouring countries, this signalled new opportunities to eschew Western pressure following a takeover. By the time of the coup d'état in Niger (July 2023), several Western governments displayed an increasing willingness to accept the fait accompli, provided they could

[1] John Lechner and Vianney Ingasso, "Wagner Woes and a Rebel Crackdown: A Briefing on the Central African Republic's Shifting Conflict", *The New Humanitarian*, September 7, 2023; Morgane Le Cam, "Au Mali, la Junte donne le Coup de Grâce à l'accord de Paix d'Alger", *Le Monde*, January 26, 2024; Human Rights Watch Mali, "L'armée et le Groupe Wagner Commettent des Atrocités Contre les Civils", *Human Rights Watch,* March 28, 2024; Human Rights Watch Mali, "L'armée et le Groupe Wagner ont Commis des Atrocités", *Human Rights Watch,* December 12, 2024.
[2] Alex Vines, "Understanding Africa's Coups", *Georgetown Journal of International Affairs*, April 13, 2024.
[3] See the contribution of Tull and Tschörner in this volume.

maintain their military presence in the country. For military officers considering taking over power in other states on the continent, the growing competition among foreign security partners is good news. Yet, this same competition also provides incumbent coup leaders and autocrats with greater choice when seeking foreign assistance in coup-proofing their regimes – as evidenced by their demand for close protection and other services from Russia's Africa Corps.[4]

Overall, emerging patterns of intervention increasingly resemble a continent-wide market for foreign security assistance. Regimes that are considered unpalatable by Western states now find ready partners in newly intervening powers. There are no longer clear geopolitical or ideological fault lines governing these relationships: by partnering with Russia, African leaders do not necessarily deter Western courtship, but may in fact spur offers for assistance by Western states anxious not to yield the floor to Russia. Libya's Haftar, who is in control of prime geopolitical real estate, best exemplifies this trend towards multi-alignment: He not only hosts a Russian military presence and cooperates closely with the UAE on support for Dagalo in Sudan, but also maintains military cooperation with Egypt, Turkey, Greece, Italy and the US, among others.[5]

Implications for Conflict Dynamics and Conflict Management

The arrival of new intervening powers in Africa, coming on the back of intensifying jihadist insurgencies and expanding US and French counterterrorism operations during the 2010s, has further increased the prevalence of internationalized civil wars on the continent.[6] The growing internationalization of civil wars has been a global trend that has been particularly pronounced across the Middle East and Africa since the early 2010s and has gone hand in hand with their increasing lethality.[7] This is borne out by the examples of Ethiopia and Sudan – two civil wars that have caused the greatest number of casualties and displaced persons in the 2020s. Internationalized civil wars also tend to last longer.[8] Multipolarity, in the form of a growing range of foreign interventions in African wars therefore manifests itself first and foremost in the growing scope and scale of violent conflict on the continent.

Multilateralism no longer offers actionable responses to these patterns of internationalized civil wars. Instead, foreign interveners themselves become key actors in the settlement of such conflicts.[9] This could take the form of military victories by one side, including following lengthy and vicious counterinsurgencies. Yet, to date there are no clear-cut cases of such victories. In fact, there are several cases in which such strategies have backfired –

[4] Julia Stanyard, *Mercenaries and Illicit Markets. Russia's Africa Corps and the Business of Conflict* (Global Initiative Against Transnational Organized Crime, February 2025).
[5] Ali Bin Musa, *Rivalry and Cooperation: Russia and Türkiye Navigate Libya's Geopolitical Labyrinth,* (Issue Brief, Middle East Council on Global Affairs, May 2025); Daniele Raineri, "I soldati libici di Haftar vengono addestrati nelle basi militari italiane", *Il Post*, July 24, 2025; Vasillis Nedos, "Deeper Engagement with Eastern Libya", *Kathimerini,* July 23, 2025; M. Amin, "UAE and Haftar Behind RSF Capture of Sudan's Triangle Border Region", *Middle East Eye*, August 12, 2025.
[6] Anna Marie Obermeier, *Conflict Trends in Africa, 1989–2022*, Conflict Trends 05/2023 (Oslo: Peace Research Institute, 2023).
[7] Siri Aas Rustad, *Conflict Trends: A Global Overview*, *1946–2023*, Prio Paper 2024.
[8] David E. Cunningham, "Blocking Resolution: How External States can Prolong Civil Wars", *Journal of Peace Research*, 47, no. 2 (2010); Sebastian von Einsiedel, *Civil War Trends and the Changing Nature of Armed Conflict,* Occasional Paper (United Nations University Centre for Policy Research, March 2017).
[9] Hellmüller and Salaymeh, "Transactional peacemaking: Warmakers as peacemakers in the political marketplace of peace processes".

including in Ethiopia, Mali and Burkina Faso.[10] Alternatively, foreign powers could choose to freeze a conflict – as Russia and Turkey have done in Libya – thereby rendering their African clients dependent on continued external support. Western governments seeking to support the settlement of African conflicts would also have to engage with intervening powers directly. To date, however, there are no signs that European states or the US are willing to exert meaningful pressure on actors such as the UAE for their role in African conflicts.

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Ann-Marie Verhoeven *is Research Assistant at Megatrends Afrika at the German Institute for International and Security Affairs (SWP).*

[10] Alex de Waal and Mulugeta Gebrehiwot Berhe, "Ethiopia Back on the Brink", *Foreign Affairs*, April 8, 2024; Nina Wilén, *Silence in the Sahel Does Not Equal Stability,* Policy Brief 374 (Egmont Institute, April 2025).

African Views on External Support for Democracy in Times of Multipolarity

Christine Hackenesch, Julia Leininger, Daniel Nowack and Armin von Schiller

Over the past few years, European political elites have increasingly viewed the EU's and China's engagement in Africa through the lens of a political rivalry between democracy and autocracy. As early as 2019, the European Commission described China as a strategic rival aiming to normalize its authoritarian model as an alternative to Western democracy.[1] This perception has only deepened in the wake of the COVID-19 pandemic and Russia's invasion of Ukraine, further reinforcing concerns among policymakers in Brussels and other European capitals. While Chinese leaders avoid publicly framing the relationship as a systemic rivalry, in practice they invest heavily in public diplomacy and international networks, at least partly in order to promote China's political model and modernization approach.[2] When it comes to democracy and political regimes more generally, multipolarity in Africa's external relations thus takes the form of systemic political rivalry, at least in the view of Western and Chinese policymakers.

While Western policymakers perceive external actors' engagement in Africa through the lens of political rivalry, it is important to find out whether African citizens welcome external actors engaging in political reforms in their country, and whether they view the EU's and China's engagement as being helpful for the level of democracy in their country, or not. Previous research suggests that African citizens perceive both the EU's and China's general engagement in a positive light, even though positive perceptions of both actors have slightly declined.[3] In Afrobarometer surveys conducted in 2014–2015, 65 per cent of respondents considered China's influence "somewhat positive" or "very positive"; by 2019–2021, this figure had fallen to about 60 per cent. Regarding the EU, approximately 44 per cent of respondents considered its cooperation "somewhat helpful" or "very helpful" in 2008, a figure that declined slightly to around 40 per cent in 2021.[4] However, beyond these perceptions of the EU's and China's general cooperation with African countries, we do not know if this also applies to their perceived influence on African political regimes (democracies/autocracies).

To address this question, we conducted representative telephone surveys in seven African countries between December 2023 and August 2024 with more than 1,200 interviews per country. We analysed public opinion in Ghana, Nigeria and Senegal in West Africa, Ethiopia, Kenya and Tanzania in East Africa, and Mozambique in Southern Africa. For all

[1] European Commission and HR/VP, *Joint Communication to the European Parliament, the European Council and the Council. EU-China – A Strategic Outlook*, March 12, 2019, JOIN (2019) 5 final.
[2] Seow Ting Lee, "Vaccine Diplomacy: Nation Branding and China's COVID-19 Soft Power Play", *Place Branding and Public Diplomacy* 19, no. 1 (2023), 64–78; Julia Bader and Christine Hackenesch, "The many faces of the Chinese Communist Party's outreach in Europe", *Asia Europe Journal* (2025 forthcoming).
[3] Thilo Bodenstein and Achim Kemmerling, "The European Union as a Collective Actor: Aid and Trade in African Public Opinion", *Development Policy Review* 35 (2017): 567–86; Marek Hanusch, "African Perspectives on China–Africa: Modelling Popular Perceptions and their Economic and Political Determinants", *Oxford Development Studies*, 40 no. 4 (2012): 492–516; Floor Keuleers, "Explaining External Perceptions: The EU and China in African Public Opinion", *Journal of Common Market Studies* 53 (2015): 803–21.
[4] Afrobarometer, Round 4 (2008/2009); Afrobarometer Round 6 (2014–2015), Afrobarometer, Round 8 (2019–2021), all accessed July 20, 2025.

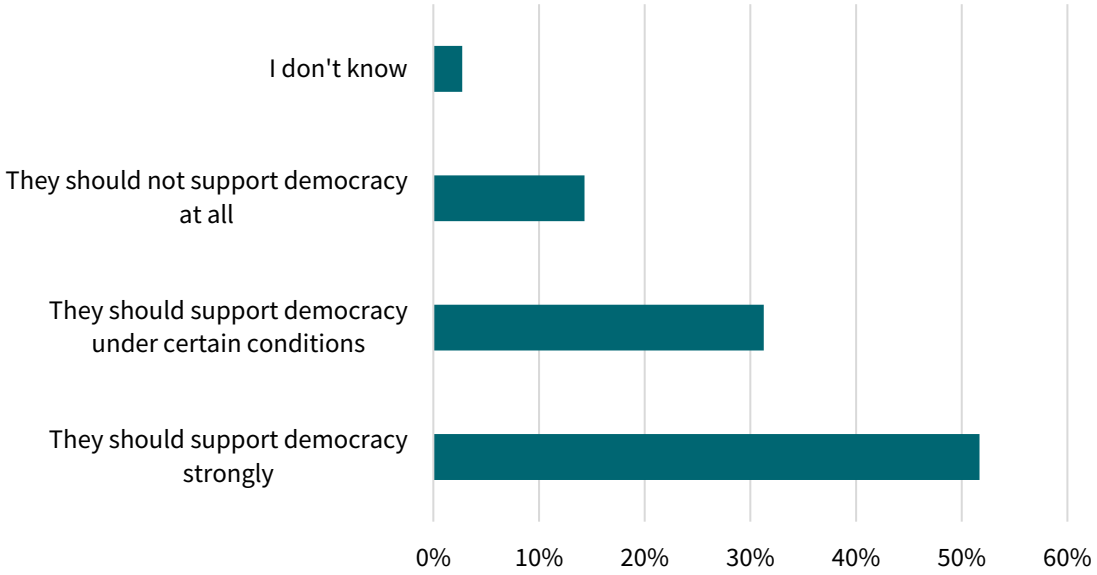
seven countries, the EU and China are major cooperation partners. At the same time, the seven countries differ with regard to various contextual factors that we anticipate to be potentially relevant in shaping African citizens' perceptions vis-à-vis the EU's or China's political influence, such as their regime type, socio-economic development and colonial past.

For this study, we analysed countries where the EU and China are both relevant partners and where the country contexts differ in terms of regime type and socio-economic performance. For feasibility reasons, we did not include countries where the EU's cooperation is highly opposed, such as in Niger, Mali or other countries in the Sahel. Once the political situation stabilizes in these countries and public opinion research becomes possible (again), it would be interesting to conduct similar analyses in one of those "extreme" cases, where one would expect public opinion towards the EU to be particularly negative. Moreover, our survey provides a snapshot of citizens' views at a specific point in time. In light of the rapidly changing global context, similar studies should be conducted in the future in order to observe longer-term trends in African citizens' attitudes.

Disconnect between Elite Discourse and African Citizens Views

To what extent do African citizens value the support for democracy provided by the EU and China in their respective countries? Our survey data is very clear on this question: African citizens' welcome external actors' engagement on democracy and think that cooperation with both the EU and China is very helpful for the level of democracy in their country. More than 50 per cent of respondents think that external actors should support democracy and another 30 per cent believe that they should engage on democracy under certain conditions (Figure 1).

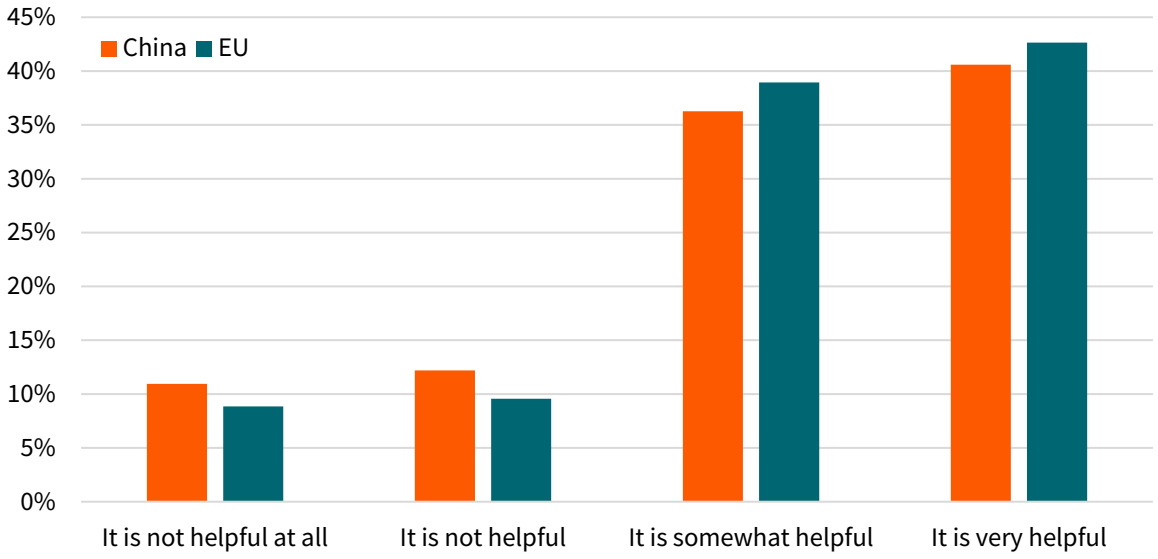
Figure 1: Legitimacy of external democracy support



Respondents were asked: "Do you think that foreign countries should support democracy in your country?"

In addition, perceptions of the EU's and China's influence on democracy are very positive. Close to 80 per cent of respondents perceive the EU's cooperation as being helpful for democracy and more than 70 per cent think the same about China (Figure 2). More than 70 per cent of respondents would welcome it if both actors were to engage much more on democracy. These general patterns do not differ much across the seven country cases. Only in Senegal is the level of support for the EU's influence on democracy slightly lower compared to that in the other countries. Interestingly, our results contrast with recent surveys of African *elite* perceptions. African elites, such as government officials, media representatives or civil society actors, apparently perceive the EU and China differently: about 85 per cent of African elites surveyed in a recent study perceive the EU as an important actor in supporting gender, about 60 per cent think the EU advocates for human rights. Only 40 per cent think gender is a relevant topic for China, and only 14 per cent think that human rights are relevant for China.[5]

Figure 2: The helpfulness of cooperation with the EU or China in supporting democracy



Respondents were asked: "Is cooperation with the European Union helpful for supporting democracy in your country?"; "Is cooperation with China helpful for supporting democracy in your country?"

These findings are very interesting, both for the EU and China. Apparently, African citizens very much welcome external actors' engagement, regardless of their respective regime types. With regard to China, our survey results suggest that African citizens do not worry too much about China being an autocratic state and it seems that they do not view China as directly or indirectly undermining democracy – on the contrary. Based on our data we cannot say why citizens believe that cooperation with China has a positive effect on democracy. One potential explanation could be that citizens subscribe to a simplified argument of modernization theory. Citizens might think that China's contribution to the economic development of their country through trade or infrastructure development will support democratization in the longer run. While we do not know why people assess China's influence on democracy positively, it is evident that citizens do not perceive China as promoting autocracy. Political debates in Europe where China is accused of actively undermining democracy by funding European universities and think tanks or through

[5] James Shikwati, Nashon Adero and Josephat Juma, *The Clash of Systems. African Perceptions of the European Union and China*, Freedom Policy Paper (Friedrich Naumann Foundation, 2022).

espionage and bribery of European parliamentarians are apparently not a concern for African citizens.

With regard to the EU, the surveys indicate that the EU's engagement on democracy is not contested among African citizens, despite the fact that African political elites often criticise the EU for advancing double standards or for imposing political conditionality against the will of African societies. Critical studies and debates on post/neo-colonialism question whether the EU should engage at all in democracy support. Among African citizens, however, the EU's engagement is apparently viewed positively and citizens would welcome stronger EU engagement.

African Perceptions of the EU's Motivations for Supporting Democracy

We also asked citizens what they think are the reasons why the EU seeks to support democracy in their country (Figure 3). As China does not have a dedicated democracy support strategy, we only asked this question for the EU. We gave respondents five potential response options from which they could select two answers. These response options can be grouped into two different motivational drivers: the fostering of norms and pure self-interest. The majority of citizens across the seven countries believe that the EU engages out of altruistic and normative considerations, although there is some variation between the countries. In Senegal, by far the majority of citizens believe that the EU engages in democracy support out of self-interest related to the desire to reduce migration from West Africa to Europe.

Figure 3: Perceived motives for the EU's democracy support

Respondents were asked: "Why do you think the European Union supports democracy in your country? I will read out five possibilities, what are the two most important reasons in your view?"

Implications for German and European Policy on Africa

For German and European policymakers, our survey results have at least three implications. First, they suggest that, despite the often-controversial debates between European and African policymakers, external support for democracy is not as contested among African citizens as one might assume. While African political elites frequently criticize the EU for perceived double standards and a post-colonial approach to "imposing" its values, our surveys across the seven countries indicate a different perspective among the general public. African citizens tend to view external actors' engagement as beneficial to the state of democracy in their countries – and many express a desire for even greater involvement. In terms of the EU's engagement, the survey results give reasons for the EU to do more to improve its democracy support rather than responding to African elite criticism by ceasing engagement.

Second, in an era in which foreign policy is increasingly played out on social media, and there is widespread dissemination of mis- and disinformation, our findings indicate that German and European efforts to strengthen strategic communication must include targeting their messages more precisely to take account of the opinion gap between African elites and the general population.

Third, our study adds nuance to the broader debate on the often-binary framing of the promotion of democracy versus autocracy. For many African citizens, the regime type of external partners appears to be of limited relevance. They value the EU's engagement as much as China's and do not perceive China as actively promoting autocracy. For German and EU policymakers, this suggests that the focus should be on the substance and effectiveness of their engagement, rather than on amplifying narratives of systemic rivalry between different political models.

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Africa's Economic Development Challenged by US-Driven Market Fragmentation, Policy Uncertainty, and Unilateralism

Rolf J. Langhammer

Never before in the recent history of growth projections had the International Monetary Fund (IMF) been forced to such a drastic downward revision of growth forecasts for the world economy, in general, and Africa, in particular, as within such a short period of time as in the first quarter of 2025.

While the IMF's January 2025 projection estimated sub-Saharan Africa's real gross domestic product (GDP) growth as 4.2 per cent, the April 2025 forecast revised the growth estimate down to 3.8 per cent. World growth was revised from 3.3 to 2.8 per cent, far below the 3.7 per cent average growth experienced over the 2000–2019 period.[1] Given such a sizeable slowdown of global demand, it does not come as a surprise that as a result, the World Trade Organization (WTO) forecasts African merchandise exports to grow by only 0.6 per cent in 2025 compared to 5.7 per cent and 1.3 per cent in 2023 and 2024, respectively.[2]

The slowdown of global demand due to the unprecedented business cycle downswing in major export markets of African products is one reason for the bleak outlook for African trade. The United States (US) tariff escalation against African suppliers imposed by the Trump administration constitutes a further impediment against exports. As a traditional supplier of raw materials, African countries usually face low or even zero most favoured nation (MFN) tariffs for these products in export markets. In addition, a number of sub-Saharan African low-income countries also benefit from unilateral tariff preferences for manufactured products granted by individual Organisation for Economic Co-operation and Development (OECD) countries (i.e., the European Union [EU] Generalized System of Preferences or the US African Growth and Opportunity Act [AGOA]). Since its inauguration in 2000, AGOA has made 32 African countries eligible for exporting duty-free to the US, while 17 countries were excluded from tariff preferences. The Trump administration now threatens to both step down from the recognition of MFN tariffs and cancel tariff preferences.

[1] International Monetary Fund, *World Economic Outlook. A Critical Juncture amid Policy Shifts* (Washington, D.C., April 2025), 12.
[2] World Trade Organization, *Global Trade Outlook and Statistics* (Geneva, April 2025), 6.

New US "Reciprocal" Tariffs on African Countries

First, the so-called "reciprocal" tariffs imposed by Donald Trump on April 2, 2025, erase the current MFN tariff structure. They charge partner countries with tariffs calculated by the size of the bilateral US trade deficit divided by the exports of the country to the US before giving them a rebate. In a case like Lesotho which exports to the US and imports nothing, the US administration calculated a tariff of 100 per cent halved to 50 per cent as a "generous" rebate. The country-specific tariff tableau presented by Donald Trump on April 2, 2025, showed tariffs for US imports from African countries ranging from 50 per cent against Lesotho to 11 per cent against Cameroon.[3] The median tariff for 21 African countries listed by Trump was 21 per cent.

Even though these tariffs were exempted for 90 days (until July 9, 2025) and despite North America (including Canada) accounting for only 6 per cent of African world exports in 2023, these tariffs already matter because a flat rate of a 15 per cent US tariff is expected to still be levied on US imports from all sources (including those from the majority of African countries) after August 7, 2025. Few countries (among them Libya, South Africa, Algeria and Tunisia) will face even higher tariffs, ranging from 25 per cent to 30 per cent. Compared to MFN tariffs on duty-free raw materials, this constitutes a sizable nominal increase in barriers imposed by US markets against the inflow of African goods.

Trump's tariff policy can also have more indirect, but equally severe consequences for African economies. Global demand for African products is not only determined by the price effect of the US tariff barriers against individual African countries, but also by the general effect of US tariffs on global demand for these products. For instance, in March 2025, the US introduced tariffs on imports of steel and aluminium to 25 per cent from all trading partners. These tariffs protect US producers against a decline of their capacities and thus add to the already existing glut of global supply. Prices are then expected to fall, with negative effects for African producers of ferrous and non-ferrous metals, such as South Africa, the Democratic Republic of Congo, Zambia, Angola and Nigeria. If excess supply were diverted to side markets, many of them also located in Africa, the new inflow of goods would exert competitive pressure on domestic African metal producers, which would eventually induce African countries' governments to likewise raise trade barriers. Africa would then become part of a domino effect of tariff escalation, which began with Trump's April 2, 2025, "tariff tantrum" against the world.

Regression in Trade Advantages from the African Growth and Opportunity Act Threatened to Expire

The second trade risk for many African countries arises from the uncertain future of AGOA. Irrespective of Trum's second term, it would have faced expiry in September 2025. Before Trump's election, it could be expected to be eventually reinstated after a review. However, it was reported that the "reciprocal" tariffs, despite being suspended for 90 days, were an announcement of the end of AGOA long before September 2025. In fact, the paradoxical "logic" of the tariffs consists in penalizing African countries with the highest tariffs (Lesotho,

[3] White House, "Fact Sheet: President Donald J. Trump Declares National Emergency to Increase our Competitive Edge, Protect our Sovereignty, and Strengthen our National and Economic Security" (The White House, April 2, 2025).

Madagascar, Mauritius and South Africa, all of them facing a "reciprocal" tariff exceeding 30 per cent) that – thanks to the AGOA preferences – were able to expand their exports to the US.[4]

Given that AGOA preferences are accessible only for processed goods like textiles and automotive parts rather than for raw materials representing the bulk of African exports, only one third of African exports to the US has benefitted from the preferences accounting for 0.5 per cent of regional GDP and for one per cent of the GDP of the two most important beneficiaries, namely Nigeria and South Africa.[5] For the US, trade under AGOA accounted for only 0.2 per cent of total US imports and it "cost" just about 2 per cent of its official aid to Africa in terms of tariff revenues foregone.[6]

To conclude on the second risk, namely should "reciprocal "tariffs be re-imposed after the end of the 90-day suspension, AGOA would have expired long before the official date of September 30, 2025. Yet, even without re-imposition, the 10 per cent flat rate tariff is a clear signal to African producers that the US is determined to divorce the marriage between aid and trade through non-reciprocal unilateral tariff preferences. The possibility of exceptions from tariff reimposition exists for critical minerals for which the US shows strong interest, especially when Chinese companies threaten to gain exclusive access to these resources. However, it seems that such exceptions are subject to ad-hoc bilateral "security for minerals" deals between a few African states hosting these resources and the US, but not for the continent as a whole as targeted by AGOA.[7]

A similar attack on the world trading system reported by media sources is the US government's decision to pause its payments to the WTO budget for 2024 and 2025 pending a review of contributions to international organisations.[8] Should these reports materialize, projects of special importance for African countries, such as training courses for African trade diplomats, or projects under the trade facilitation scheme, such as the improvement of customs clearance facilities in Africa, could be jeopardized.

Africa's opportunities to integrate into global supply chains are likely to also take a hit from the almost complete dismantling of the United States Agency for International Development (USAID). Should funds for the three priorities (humanitarian aid, health and economic development) cease to be replenished, this would have a strong negative effect on the competitiveness of both agriculture and manufacturing in which abundant low-skilled labour in good physical and mental condition constitutes an important prerequisite for sub-Saharan African producers to improve their trading capacity within supply chain networks.

Implications for EU Trade Policy

There are three implications for the EU and Germany from the strongly negative repercussions of US trade policy and aid commitments on Africa's economic prosperity.

First, the EU should end its long-standing mercantilist trade policy in which the country block urges African countries to offer semi-reciprocal counter concessions in exchange for

[4] Peter Fabricius, *Could Africa still be hard hit by Trump's tariff tantrum?* (Institute for Security Studies Today, April 11, 2025).
[5] Luke Kilian, "Will the African Growth and Opportunity Act survive under Trump?", *African Business*, February 21, 2025.
[6] Justin Sandefur and Arvind Subramanian, *Renewing AGOA 'As Is' Won't Do Much for Africa's Exports. Here's What Could* (Center for Global Development, April 2, 2024).
[7] Julian Pecquet, *US-Africa: Trump's minerals and energy plans, PEPFAR, AGOA on the agenda for Congress* (The Africa Report, March 24, 2025).
[8] James Bacchus, *Another Misguided US Attack on the World Trade Organization* (Cato Institute, March 28, 2025).

the alleviation of EU entry barriers. Instead, unilateral market opening on a MFN basis should concentrate on all products in which African suppliers are competitive. This would constitute an incentive to long-term investment and more resilience in supply chains with African participation. The application of the MFN principle in compliance with the WTO rules would make rules of origin (RoO) redundant. This is important as RoO are often protectionism in disguise or highly bureaucratic and thus cost intensive.

Second, the EU should submit its strict sustainability rules in all three Environmental, Social, and Governance dimensions to facilitate non-traditional African exports. This would include more generous financial support to meet technical standards designed to protect EU consumers. Relaxing the Corporate Sustainability Due Diligence Directive through the so-called Omnibus package points in the right direction. So does the announcement of the new German government to cancel one of the key elements the German due diligence legislation, namely the commitment for companies to report its compliance efforts.

Third, the EU operates a complex set of sub-regional and bilateral Economic Partnership Agreements (EPAs) in sub-Saharan Africa, embedded in the successor agreement of the Cotonou Partnership Agreement and the 2023 Samoa Agreement. Just as trade agreements with North African countries, EPAs suffer from the inefficiencies of overlapping membership and the so-called noodle bowl syndrome. While the long-term target of forming an African Continental Free Trade Area (AfCFTA) is still far from the implementation stage, the EU could contribute to the political momentum of the AfCFTA by closing the gap between the agreements with North African countries on the one hand and the EPAs on the other hand. Any consolidation and merger of EPAs would be instrumental in overcoming the splitting of the continent into obsolete post-colonial borders.

Even if the EU fully implements these suggestions, it will not be able to fully offset the negative implications of US trade policies on African prosperity under President Trump. However, through these changes, the EU can significantly contribute to making African countries more resilient against shocks, which are likely to emerge again and again during President Trump's second term.

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Railway Wars? China's Dominance in Infrastructure Development in Africa

Karoline Eickhoff, Linda Maokomatanda and Rainer Thiele

Historically, large-scale infrastructure projects such as roads and railway lines have been prime examples of Western influence in Africa. Beginning with colonialism in the 1880s, rivalling European countries brought nearly all of the African continent under their control in what has been called a "scramble for Africa". Western countries – mainly the former colonial powers and the United States (US) – remained the predominant external actors after African independence.

This changed in the early 2000s when Chinese direct investment attracted increasing attention. In particular, with the launch of the Belt and Road Initiative (BRI) in 2013, China has become by far the most important investor in African infrastructure. The sector has recently seen an increase in activity from other external actors as well. As with the increased interest in the continent's raw materials (see Chapter 6), geopolitical competition has intensified over connectivity projects. For example, the Lobito Corridor initiative – connecting the Democratic Republic of Congo, Zambia and Angola in Southern Africa – can be seen from a lens of geopolitical competition between the US together with the European Union (EU) on the one side and China on the other. In recent years, the United Arab Emirates in particular has made major funding commitments, most notably in ports and renewable energies. Overall, large infrastructure projects once again find themselves at the heart of the competition between external actors in Africa, with China remaining the dominant actor.

In this environment, the EU has singled out the BRI as a means by which China is seeking to expand its influence in Africa. The EU's Global Gateway Initiative launched in 2021 is widely seen as a strategic policy response to the BRI and China's dominance in the sector and as an alternative offer to African countries with a strong infrastructure focus. The investment initiative is designed to play an important role in achieving the EU's geopolitical ambitions: To give European actors a competitive edge in African infrastructure and to ultimately increase Europe's political and economic influence on the continent.[1]

However, while other sectors have experienced swift and profound changes in patterns of foreign intervention in recent years (see Chapter 2), China remains largely unrivalled in its ability to build and fund "hard" infrastructure, such as roads, railways, ports and special economic zones in Africa. Meanwhile, the EU continues to grapple with the implementation of its Global Gateway projects. We argue that this is only partly due to geo-economic and geopolitical forces. A key factor behind China's persistent dominance is local agency. This chapter develops upon this point by showing how China's offers continue to align more

[1] Several senior EU officials have made competitive statements regarding the Global Gateway Initiative and China. For example: Josep Borrell, "Global Gateway, EU's Proposal in the Global 'Battle of Offers'", *EU External Action*, October 27, 2023.

closely with the economic and political interests of local elites, who ultimately decide on infrastructure investment. We illustrate this in the context of Kenya.

Macro Perspective: Economic Benefits of Chinese Projects despite Local Political Capture

Among Western commentators, the dominating view is that China's infrastructure projects in Africa tend to favour corrupt and authoritarian regimes and advance the country's own interests rather than addressing the needs of host country populations.[2] However, according to recent empirical evidence, the motives behind China's development finance are not fundamentally different from that of major Western donors in the sense that the latter also pursue political and economic interests when giving aid, a prominent example being the United States' unwavering support for Egypt and Pakistan.[3] The only distinctive motive of Chinese development finance – besides withholding support in line with the One China policy from countries that diplomatically recognize Taiwan – is its adherence to the principle of non-interference in the internal affairs of recipient countries.[4] This implies, among other things, that China uses a demand-driven approach where local politicians and bureaucrats have strong discretion over the selection and geographic location of investment projects. Larger projects are also typically negotiated directly with political leaders from recipient countries.

Development finance from China is therefore more prone to political capture by local elites than Western aid. Specifically, it has been empirically shown that political leaders' birth regions received substantially larger financial flows from China during the years when they held power compared to what the same region received at other times.[5] There is also evidence that Chinese aid projects support local-level corruption in Africa.[6] This might be because following its policy of non-interference in the domestic affairs of recipient countries, China is unlikely to take an active role in fighting corruption. Instead, China is rather often accused of engaging in corrupt practices when implementing projects.

The vulnerability of Chinese development finance to local political capture has prompted speculation that it may be economically ineffective or even harmful given that studies undertaken for Western donors tend to show that aid allocated according to political criteria will be less effective at improving economic conditions than aid allocated according to need and efficiency considerations.[7]

Yet, while similar in its motives, Chinese development finance is different from Western aid in at least two dimensions other than its vulnerability to political capture. First, China has usually preferred to support a coordinated set of fairly large projects so as to develop clusters of interconnected firms which might crowd in additional investment and catalyse

[2] Arguably the most pronounced critique of China's engagement in Africa has come from the American political scientist Moises Naim, who coined the term "rogue aid" (Moises Naim, "Rogue Aid", *Foreign Policy*, October 19, 2009).
[3] Anke Hoeffler and Olivier Serck, "Is Chinese Aid Different?", *World Development* 156 (2022): 105908.
[4] Axel Dreher, Andreas Fuchs, Roland Hodler, Bradley Parks, Paul Raschky and Michael Tierney, "African Leaders and the Geography of China's Foreign Assistance", *Journal of Development Economics* 140 (2019): 44–71.
[5] Ibid.
[6] Ann-Sofie Isaksson and Andreas Kotsadam, "Chinese Aid and Local Corruption", *Journal of Public Economics* 159 (2018): 146–59.
[7] Axel Dreher, Andreas Fuchs, Roland Hodler, Bradley Parks, Paul Raschky and Michael Tierney, "Is Favoritism a Threat to Chinese Aid Effectiveness? A Subnational Analysis of Chinese Development Projects", *World Development* 139 (2021): 105291.

economic agglomeration.[8] China's approach is in line with research that shows that public investment often plays a catalytic role in crowding in private capital:[9] It first established a local presence through private companies which was then reinforced with large-scale public infrastructure investments financed through state banks and policy vehicles. This layered strategy ultimately created a platform where private and public Chinese capital could interact and reinforce one another under the BRI umbrella. Second, China has a reputation for implementing large-scale infrastructure projects more efficiently than Western donors. Most notably, there are clear indications that the Chinese are much faster than traditional donors at getting projects running (for an example, see Kenya's Standard Gauge Railway below).

Overall, at least in the short run which crucially matters for local elites, Chinese projects in Africa are often associated with economic gains. Despite political favouritism, existing evidence points to positive economic growth effects on average, with projects located in birth regions of political leaders being as effective as other comparable projects.[10] Another study shows that Chinese infrastructure lending to African countries has promoted participation in global value chains, most likely by reducing trade and transport costs.[11] Whether the short-run benefits, which to a large extent reflect the economic activity generated during the build-up of the infrastructure, translate into significant longer-term gains has yet to be established.

On the downside, there are indications that Chinese lending within the BRI has contributed to the debt distress currently characterizing several African countries, and that China's involvement has rendered debt restructuring more difficult.[12] In some instances, for example in Zambia where China accounts for a large share of foreign debt, this may have led local elites to become more cautious regarding the approval of new Chinese investments. Chinese investors have also frequently been accused of violating environmental standards and human rights, but mostly by civil society groups, arguably with little impact on the behaviour of local elites.[13]

Chinese-Funded Infrastructure Development in Kenya: Local Elites Have the Final Say

The importance of local agency for stable investment relations with China can also be illustrated for the specific case of Kenya. Reflecting wider trends on the continent, research into the political economy of infrastructure development in Kenya has revealed the close interactions between Chinese state and private sector interests and the political and eco-

[8] This feature may change if there is a move away from large projects announced in FOCAC 2024 (Hangwei Li and Christine Hackenesch, "FOCAC 2024: Moving Away from Large Infrastructure Deals towards Normative Power of China", *Megatrends Spotlight* 38, September 16, 2024).
[9] The seminal study is Paul Alan Aschauer, "Does Public Capital Crowd Out Private Capital?", *Journal of Monetary Economics* 24, no. 22 (1989): 171–88. For more recent evidence for developing countries, see John Francois Nana, Maty Konte and Franz U. Ruch, *"Crowding In" Effect of Public Investment on Private Investment Revisited* (Washington, D.C.: World Bank, August 2024) (accessed August 8, 2025).
[10] Dreher et al., "Is Favoritism a Threat to Chinese Aid Effectiveness?", 105291.
[11] Vito Amendolagine, Andrea Presbitero and Roberta Rabelotti, "Chinese Infrastructure Lending in Africa and participation in Global Value Chains", *Review of World Economics* 161 (2025): 7–48.
[12] Sebastian Horn, Bradley Parks, Carmen Reinhardt and Christoph Trebesch, "Debt Distress on China's Belt and Road", *American Economic Review Papers and Proceedings* 113 (2023): 131–34.
[13] See, for example, Carolos Oya and Florian Schaefer, "Do Chinese Firms in Africa Pay Lower Wages? A Comparative Analysis of Manufacturing and Construction Firms in Angola and Ethiopia", *World Development* 168 (2023): 106266.

nomic interests of local elites.[14] The country's Standard Gauge Railway (SGR) is both a cornerstone of the BRI in the region and a national flagship project of the country's development blueprint (Kenya Vision 2030). It is Kenya's most prominent example of a Chinese-funded and -implemented infrastructure project where the risks and opportunities have been subjected to much research and the crucial role of elites is well documented.[15]

The SGR was opened ahead of schedule in May 2017, connecting Nairobi with the port city of Mombasa. Politically, the railway benefitted then-President Uhuru Kenyatta as a "legacy project", helping him to secure his re-election. In economic terms, the project has created opportunities for rent-seeking by local and national elites in the form of kickbacks for officials, preferential treatment for firms with political connections and in the context of land compensation, to name a few.[16]

The picture is mixed when it comes to the project's wider development benefits. Given the SGR's symbolic status in Kenya-China relations, both governments maintain that the railway has been a profitable investment. Research has highlighted positive economic growth effects, including job creation, increased economic activity along the railway line, improved mobility and reduced transport costs. However, the project has also attracted criticism due to its high construction costs, lack of transparency regarding contract terms, and the resulting public debt.[17] Thus, the railway project illustrates several of the above-mentioned advantages and disadvantages of Chinese investment in the sector. Overall, no final judgement on the SGR's economic viability and development benefits has been reached thus far.

Nevertheless, the political appeal of implementing major infrastructure projects in partnership with China appears undiminished. The government under President William Ruto is engaged in negotiations with China over a planned extension of the SGR to the Ugandan border – an estimated 369 km project expected to cost around USD 4.5 billion. While the funding framework and cost-sharing model are still being developed (as of August 2025), recent government announcements indicate that Kenyan-Chinese cooperation in the infrastructure sector is being adapted to the shifting interests and constraints of both sides.

Western actors have made competing connectivity offers to Kenya. Some "Team Europe" projects have been launched in the transport sector, particularly along the Northern Corridor.[18] However, European actors have been overall quiet around the Global Gateway Initiative in Kenya. It seems that China remains the country's preferred partner in infrastructure development.

[14] Tim Zajontz, *The Political Economy of China' Infrastructure Development in Africa: Capital, State Agency, Debt* (Palgrave Macmillian, 2023); Giles Mohan and Ben Lambert, "Negotiating China: Reinserting African Agency into China-Africa Relations", *African Affairs* 112, no. 446 (2012): 92–110.

[15] For example: Zhengli Huang, Gediminas Lesutis, "Improvised Hybridity in the 'Fixing' of Chinese Infrastructure Capital: The Case of Kenya's Standard Gauge Railway", *Antipode*, February 15, 2023; Chris Alden and Oscar Otele, "Fitting China In: Local Elite Collusion and Contestation Along Kenya's Standard Gauge Railway", *African Affairs* 121, no. 484 (July 2022): 443–66.

[16] For more details, see: Tim Zajontz, "Locating Africa in the Second Cold War: The Geopolitical Economy of Kenyan Polyalignment", *Third World Quarterly*, Jun 18, 2025; Uwe Wissenbach and Yuan Wang, *Local Politics Meets Chinese Engineers: A Study of the Chinese-Built Standard Gauge Railway Project in Kenya* (China Africa Research Initiative, 2016); (accessed 3 June 2025).

[17] Karoline Eickhoff, *Chinese Megaprojects in Kenya*, Megatrends Policy Brief 4 (Megatrends Afrika, May 2022).

[18] "Kenya Upgrades East Africa's Busiest Trade and Transport Route from Kwa Jomvu to Mariakani under Global Gateway Initiative" (European Investment Bank, February 27, 2025); (accessed 27 June 2025).

Implications for the EU Global Gateway

The limited traction of the EU's Global Gateway initiative to date suggests a deeper mismatch. European investment is often slowed by complex due diligence procedures, legal constraints and bureaucratic fragmentation. While transparency and environmental safeguards are important, they also delay delivery and reduce the political visibility of European infrastructure offers. In contrast, China's approach often aligns more closely with the political priorities of African elites, namely, speed, scale and discretion. For African governments under pressure to show results, this makes the EU a less appealing partner, regardless of the quality or intent behind its projects. In this context, China's dominance reflects the political economy of decision-making within African states. From a competitive standpoint, it has proven challenging for European policymakers to turn the tide in the absence of a real strategic advantage.

However, we would argue that European actors could still take steps to better align their infrastructure offers with local demand, particularly with regard to mobilizing the private sector. Global Gateway aims to attract significant private sector investment by leveraging EU budget guarantees and offering risk-sharing instruments, amongst other things. However, this strategy has not yet produced significant results. We therefore suggest that European actors try to strengthen private sector involvement in line with evidence from other contexts in which efforts to crowd in private investment bore fruit. Rather than relying on private capital to shoulder the EU's geo-economic ambitions from the outset, the EU should seek to prime the investment environment for private sector follow up. While little is known about local impact at this early stage, infrastructure-related funding along the Lobito Corridor is reported to be attracting private investment, particularly in mining and rail operations.

Given the EU's comparatively limited resources, these public investments should target at a few strategically selected regions where political leaders and communities are open to European investment cooperation and where private sector interest is confirmed. If the Global Gateway can implement this approach to mobilizing the private sector effectively on a small scale, there might be potential for it to be rolled out more widely.

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Africa's Critical Minerals for the Energy Transition: Strategies of External Powers and African Agency

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The global rush for critical minerals has intensified amid a changing and complex world order. Multiple powers, including China and the United States, as well as the European Union (EU) and others, are vying for influence in Africa, which holds vast reserves of cobalt, lithium, rare earths, and other minerals essential for the clean energy transition.[19] Demand for these resources is surging; for example, global lithium demand is expected to increase tenfold by 2050, driving billions in new mining investments, with Africa likely to attract a substantial share.[20]

African countries collectively hold around 30 per cent of the world's known mineral reserves – including 70 per cent of global cobalt reserves, a metal crucial for batteries.[21] Historically, African economies were trapped in a "primary commodity" model, exporting raw materials under conditions shaped mainly by external powers, thereby limiting African agency and development.[22]

Today, the global race for critical minerals offers both opportunities and risks for the continent. On the one hand, the surge in demand for resources gives African countries renewed leverage to move beyond their historical role as mere exporters of raw materials.[23] Even in a period marked by weak multilateral cooperation, Africa's critical resources are so strategically important that major powers are compelled to engage, creating potential for African governments to negotiate more favourable, mutually beneficial, partnerships.[24] On the other hand, without a coordinated and proactive strategy at the AU level, African countries risk remaining at the bottom of the value chain, where value addition is minimal and external actors continue to dictate terms, reinforcing patterns of dependency and underdevelopment.[25] There is growing concern that the current scramble for Africa's "green" minerals could reproduce exploitative dynamics in which profits flow outward while African communities face environmental, social, and economic burdens.[26]

In an increasingly multipolar environment, this chapter examines how external actors' motives and strategies in Africa's critical minerals sector influence outcomes. The main

[19] Atlantic Council Africa Center, *The Strategies Driving the Players in Competition for Africa's Critical Minerals* (Atlantic Council Africa Center, 2023).
[20] Pia Beuter, Judy Hofmeyr, Lili Gabadadze, Rajneesh Bhuee, and Amandine Gnanguênon, *Mapping Africa's Green Mineral Partnerships* (Africa Policy Research Institute, 2025).
[21] Marit Kitaw, *Africa's Strategic Positioning in the Global Green Revolution and Critical Minerals Race* (Washington, D.C.: Brookings Institution, 19 March 2025).
[22] "Commodity Dependence Haunts Least Developed Countries" (United Nations Conference on Trade and Development [UNCTAD], February 2022).
[23] "The Role of Critical Minerals in Clean Energy Transitions" (International Energy Agency [IEA], 2021).
[24] "Critical Minerals: Africa Seeks Transformation from Raw Export of Critical Minerals to Battery Manufacturing" (African Development Bank [AfDB], December 5, 2024).
[25] Dani Rodrik, New Technologies, *Global Value Chains, and Developing Economies,* NBER Working Paper no. 25164 (National Bureau of Economic Research [NBER], October 2018).
[26] Lee Wengraf, Janet Bujra, Chanda Mfula, Elisa Greco and Ray Bush, "The Climate Emergency in Africa", *Review of African Political Economy* 50, no. 177–8 (October 2023): 295–301.

external players are China, the United States (US), and the European Union. Despite having significant internal capacity constraints and external pressures, African governments, this chapter argues, should adopt proactive strategies to maximize benefits from multipolar competition. As a key player, Germany should pursue a fair and strategic partnership approach in Africa's minerals sector. This means aligning its goal of ensuring a secure supply of critical minerals with Africa's development plans – supporting local value addition, infrastructure, and good governance, and avoiding extractive models. Under the EU's 2023 Critical Raw Materials Act (CRMA), importers must conduct OECD-aligned due diligence and publish annual reports on the origin and social-environmental risks of critical minerals supply chains. Germany can extend this requirement to bilateral offtake agreements that bind producers and buyers to predetermined commodity prices. It could also ensure that German firms transfer best-practice risk-management tools, such as chain-of-custody tracking and public-disclosure templates, to African regulators and stakeholders. Simultaneously, through the EU–Africa Minerals Initiative and the Global Gateway framework, German development agencies (e.g. The Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) and KfW) should link concessional financing and technical assistance to specific local-value-addition milestones and good governance. Embedding CRMA reporting duties, due diligence standards, and co-funded infrastructure and capacity-building projects within an equitable EU–Africa minerals partnership enables Germany to secure critical mineral supplies for its energy transition. At the same time, this approach creates opportunities for African industrial growth and advancement.

Engagement and Strategies of External Powers

Multiple powers compete for Africa's critical minerals, often pursuing unilateral advantages rather than cooperation. China has invested massively in African mines and processing facilities (e.g. a major resources-for-infrastructure deal in the Democratic Republic of Congo), gaining dominant control of many supply chains. Numbers show a starker picture: of the USD 21.7 billion that represents China's total engagement with Africa under the Belt and Road Initiative, USD 8 to 10 billion was in the critical mineral sector. In contrast, of the USD 7.4 billion that the US invested in Africa in the same year, only USD 300 million (about 4 per cent) was invested in critical minerals.[27] China's investment secures Beijing's mineral needs but often sidelines local value addition, as China imports semi-processed ores from Africa for its refineries[28] and for the export of finished products to other markets.

The US interest and motive in Africa's critical minerals sector is framed mainly by geo-political rivalry with China and a desire to diversify supply. Washington views its heavy reliance on Chinese-refined minerals as a strategic vulnerability and has sought to reduce dependence on China. The US has focused on Africa's mineral-rich regions to secure alternative sources. One important initiative is the Lobito Corridor project – a US- and EU-backed railway and corridor development to connect cobalt and copper mines in the DRC and Zambia to the Atlantic port of Lobito in Angola. The project aims to facilitate exports of critical minerals westward and offer an alternative to China-centric routes. The US has also explored "minerals-for-security" arrangements. For example, a proposed deal with the DRC would exchange access to critical mineral resources for US security assistance and

[27] Sydney Tucker, "Competing for Africa's Resources: How the US and China Invest in Critical Minerals" (Washington, D.C.: Stimson Center, 28 February 2025).
[28] Lina Benabdallah, *China's Engagement in the critical minerals landscape in Africa Potentials and challenges of tapping into the Global Energy Transition* (Africa Policy Research Institute, 2024).

counterinsurgency support. Additionally, the US has spearheaded the Minerals Security Partnership (MSP) alongside the EU, the UK, and Japan to coordinate investments in a diverse, sustainable critical mineral supply.

The EU and its member states are committed to securing the critical minerals necessary for the clean energy transition. Through the Global Gateway, the EU commits itself "to supporting responsible mining practices and ensuring secure access to critical raw materials (CRMs) for both Europe and Africa" and to supporting the requisite infrastructure, technologies and innovation that are needed to meet the expected rise in demands for CRMs.[29] The EU strategy is grounded in sustainability, diversification, and partnership, an approach that has created grounds for collaboration with the African Mining Indaba, a 30-year-old initiative through which Africa provides a forum for mining stakeholders and commits them to sustainable investment in African mining. A central pillar of this strategy is the "Critical Raw Materials Act" (2024).[30] The Act aims to reduce the EU's dependency on single-source supply chains – particularly those dominated by China – while aligning mineral sourcing with environmental, social, and governance (ESG) principles. The EU has initiated a series of bilateral partnerships with African countries to operationalize these objectives. For instance, the EU signed a strategic alliance with Namibia in late 2022 to secure sustainable access to critical raw materials.[31] Similar dialogues are underway with the DRC, Zambia, and Morocco.[32] In parallel, the EU actively engages in multilateral platforms such as the Minerals Security Partnership, reinforcing its commitment to "diversified and responsible" sourcing. However, the EU's risk-averse and process-heavy approach may slow the pace of investment. Complex regulatory requirements and stringent ESG compliance mechanisms – while important for ensuring sustainability – can delay project implementation timelines. This contrasts with the more streamlined model adopted by China, which has fewer conditions. Nonetheless, the EU views African nations as strategic partners. While the EU's model holds strong potential to support sustainable development, its ultimate effectiveness will hinge on whether it can balance procedural caution with the pressing investment demands of its African partners. The same could be said about the US strategy, for example its car battery value-chain agreement with the DRC and Zambia, which combines hard infrastructure needed by the two African countries and their ambition to benefit from growing demand, with sustainability.[33]

In conclusion, both the EU and US seek secure critical mineral access, promote sustainability, and support African industrial growth. The EU emphasizes regulation, ESG standards, and long-term partnerships through measures like the Critical Raw Materials Act and Global Gateway. The US takes a more transactional, infrastructure-driven approach, illustrated by the DRC–Zambia battery value-chain agreement, which prioritizes visible projects closely tied to industrial policy objectives.

[29] "European Union Committed to Sustainable Mining Partnerships at Mining Indaba Conference" (European Commission, Global Gateway, 2025).
[30] "Regulation (EU) 2024/1252 of the European Parliament and of the Council of 11 April 2024 establishing a framework for ensuring a secure and sustainable supply of critical raw materials and amending Regulations (EU) No. 168/2013, (EU) 2018/858, (EU) 2018/1724 and (EU) 2019/1020", EUR-Lex.
[31] "Partnership on Sustainable Raw Materials Value Chains and Renewable Hydrogen between EU and Namibia", (Brussels: European Commission, 8 November 2022).
[32] Meike Schulze, *Security of Supply in Times of Geo-economic Fragmentation: Enhancing the External Dimension of the EU's Raw Materials Policy,* SWP Comment 15/2024 (Berlin: Stiftung Wissenschaft und Politik, April 2024).
[33] "The United States Releases Signed Memorandum of Understanding with the Democratic Republic of Congo and Zambia to Strengthen Electric Vehicle Battery Value Chain" (Washington, D.C.: United States Department of State, 2023).

African Agency and Positioning Amid Competition

African governments are actively reshaping their approach to critical mineral development to avoid repeating the historic raw material export dependency pattern. Due to limited local processing, weak linkages, and infrastructure and governance constraints, African countries collectively capture only about 40 per cent of the revenue they could obtain from their mineral resources.[34] Driven by a clear objective to move up the value chain, many countries are implementing policies that promote local processing and resource-based industrialization. Export bans on unprocessed ores are a key tool in this strategy. Tanzania banned unrefined gold exports in 2017, Zimbabwe halted raw lithium exports in 2022, and Namibia followed in 2023 with a ban on unprocessed lithium and other critical minerals. Zambia and the DRC "have signed a partnership agreement to produce nickel, manganese and cobalt battery precursors".[35] These examples demonstrate Africa's intent to assert its agency, mainly by pursuing value addition. Alongside export restrictions, governments are mandating local content requirements and requiring joint ventures to ensure that foreign investments generate local employment and build technical expertise. In the DRC, authorities review existing mining contracts, including major Chinese agreements, amid concerns over unmet infrastructure commitments.[36] This shift signals a broader effort to renegotiate Africa's role in global supply chains.

At the continental level, the African Union (AU) adopted an African Green Minerals Strategy (AGMS) in 2025 – a blueprint for harnessing critical minerals to drive sustainable development.[37] The AGMS advocates for regional mineral processing and battery production hubs, like copper and cobalt refining in the Zambia–DRC Copperbelt. It also calls for investing in infrastructure and workforce skills. The strategy further emphasizes forming partnerships that include technology transfer to Africa. If African states coordinate their policies and avoid undercutting each other, they can leverage significantly more in dealings with China, the US, the EU, and other powers. In essence, African agency is being promoted by deliberate policy choices and diplomacy at national and pan-African levels. This was evident when African ministers jointly underscored the value-addition agenda at the 2025 OECD High-Level Dialogue on Africa's Critical Minerals – reaffirming that Africa intends to shape the terms of engagement, not just accept them.

Despite significant momentum toward local value addition in Africa's critical minerals sector, several structural and institutional constraints limit the continent's capacity to leverage its resource endowments fully. African countries face power shortages that disrupt industrial activity and deter private investment. Moreover, the absence of a high-skilled technical workforce and limited access to advanced refining technologies further hinder downstream development. Ambitions for local beneficiation must be aligned with industrial policies that address energy access, workforce development, and technology transfer.[38] Limited regulatory capacity and weak enforcement mechanisms generate uncertainty, reducing long-term investment attractiveness in domestic value addition. Hitherto, asymmetric negotiating power between African governments and multinational corporations often leads to suboptimal contract terms. With increasing global demand for critical

[34] "How Africa Can Harness Critical Mineral Wealth to Revamp Economies" (United Nations Conference on Trade and Development [UNCTAD], 3 June 2024.
[35] Jordan McLean and Adrian Joseph, *The Geopolitics of Energy Minerals: How Africa Can Lead the Green Energy Transition* (South African Institute of International Affairs, 2024).
[36] "DRC: Government Reviews $6 Billion 'Infrastructure-for-Minerals' Deal with Chinese Investors" (Business & Human Rights Resource Centre, 7 September 2021).
[37] *Africa's Green Minerals Strategy (AGMS)* (African Union, 2023).
[38] Charles Vandome, *How Can African States Benefit from the EU Critical Raw Material Act and the UK Critical Minerals Strategy?* (Africa Policy Research Institute, 11 September 2024).

minerals concentrated in Africa, there is potential for mineral-rich African countries to augment their bargaining power and agency, options that have historically been limited due to constraints listed above. Furthermore, pervasive corruption and lack of transparency diminish developmental outcomes. For example, in cobalt-rich regions of the DRC, unregulated artisanal mining has proliferated, raising serious concerns around human rights and environmental governance.

Conclusion and Policy Recommendations

African countries stand at the centre of a global scramble for critical minerals and must assert their agency in shaping outcomes. There is a genuine risk of being caught in a great-power tug-of-war. Thus, African leaders should seek partnerships with all major players while avoiding entanglement in their geopolitical agendas. They can leverage emerging players so that no single power dominates their resources. This diversification empowers African governments to negotiate more favourable terms, ranging from infrastructure investments to technology transfers. Crucially, African nations should insist on local value addition and beneficiation – processing raw minerals domestically to spur local industries and create jobs. African states can protect communities and ecosystems by enforcing robust environmental, social, and governance standards while appealing to responsible investors. All these efforts should align with African-led strategies and visions, ensuring that external deals complement national and regional development plans. In doing so, African states strengthen their bargaining power, secure greater long-term benefits, and drive home-grown industrialization.

Germany and the EU, seeking reliable access to green transition minerals amid geopolitical competition, should adopt a partnership approach that extends beyond mere extraction. Rather than treating Africa solely as a source of raw materials, European policy-makers should support African industrial ambitions through concrete actions. This means investing in infrastructure and capacity for refining and manufacturing in Africa, not just importing ores. To build trust, the EU and its member states should align their initiatives with the African Union's strategies and ensure that African voices shape joint projects. For example, external players could also embark on a bold commitment to relocate parts of the critical minerals value chain to Africa. Germany and the EU can secure critical minerals through equitable, long-term alliances that promote local value addition and uphold strict sustainability, while simultaneously advancing African development. Such a collaborative strategy – supporting Africa's industrialization while also supporting the security of Europe's supply – will yield mutually beneficial outcomes for both sides rather than a zero-sum scramble.[39]

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[39] Thomas Acheampong, *From Mines to Markets: How Africa and Europe Can Become Green Industry Partners of Choice* (European Council on Foreign Relations, April 24, 2024).

The Sweet Temptation of Multiple Offers: Africa's Digital Policy in a Changing Global Order

Benedikt Erforth and Hangwei Li

Africa's digital transformation is deeply intertwined with questions of power, strategic influence, and an evolving world order.[1] As multipolarity reshapes international relations, the continent has become a focal point in the intensifying competition among major global powers for digital supremacy. Key actors that embrace techno-optimistic narratives and stand ready to partner with the region include the European Union (EU) and its member states, the United States (US), China, and India, among others.

Competing External Offers

Africa's digital connectivity has improved significantly but still lags behind all other regions.[2] In 2024, only 38 per cent of Africans used the internet – well below the world average of 68 per cent.[3] To close the digital divide, substantial investments in infrastructure, including last mile connectivity, subsea cables, mobile broadband, and data centres are required. The digital sector can be conceptualized as a "stack" comprising multiple layers – from infrastructure and service provision to the consumer-facing applications. Across this entire digital stack, external actors exert significant influence, particularly in the infrastructure layer, where China (e.g. through Huawei and ZTE) dominates alongside notable roles played by the US (e.g. through Cisco) and Europe (e.g. through Orange and Nokia).

Chinese firms are said to have contributed as much as three-quarters of the 3G, 4G, and 5G infrastructure across the continent.[4] The launch of the Digital Silk Road (DSR) – a component of the Belt and Road Initiative (BRI), has further boosted Chinese investment, including by digital start-ups, in African markets. A central financial tool is the "EPC + F" model, under which Chinese companies manage the "engineering, procurement, and construction" of projects, while Chinese policy banks provide financing.[5]

The way China regulates its digital sector at home shapes the exports of norms abroad. Domestically, China seeks to advance social and political stability through a digital framework that emphasizes centralized state control over the digital space, including disseminating propaganda and disinformation on digital platforms.[6] Externally, with the

[1] Tevin Tafese, *Advancing EU–Africa Digital Partnerships amid Growing Geopolitical Competition,* GIGA Policy Study no. 4 (Hamburg: German Institute for Global and Area Studies [GIGA], 2025).
[2] Ibid., 9.
[3] International Telecommunications Union (ITU), *State of Digital Development and Trends in the Africa Region: Challenges and Opportunities* (April 2025).
[4] Allen Nate, "Demystifying External Actor Influence in Africa's Technology Sector" (Africa Center for Strategic Studies, November 12, 2024).
[5] Muyang Chen, "Infrastructure Finance, Late Development, and China's Reshaping of International Credit Governance", *European Journal of International Relations* 27, no. 3 (2021): 18.
[6] Kumar Suneel, "China's Digital Expansionism in Africa and the US Counter-Strategies", *Insight on Africa* 16, no. 2 (2024): 146–65.

support of state-backed financial institutions, Chinese companies, while primarily driven by economic interests, have exported digital tools with advanced surveillance capabilities to at least 13 African countries.[7]

In response, the EU and the US have launched initiatives aimed at offering African governments alternative solutions. Under President Biden, technology became a key foreign policy agenda, during which his administration proposed the Digital Transformation with Africa (DTA) initiative, committing "more than USD 900 million in financial resources to support Africa's digital economy and infrastructure, human capital development, and digital enabling".[8] While most major infrastructure projects by US tech firms – such as Google's Equiano and Meta's 2Africa cables – were developed independently of the DTA initiative, DTA nonetheless gave renewed impetus to US engagement in the region's digital development.[9]

Although the EU lags behind China and the US in digital infrastructure investments, it is known for promoting its norms and regulations externally. The 2016 General Data Protection Regulation has spurred interest across Africa in the regulation and governance of personal data. By externalizing its own standards, the EU aims to shape global discourses on technology and facilitate trade and data exchange through alignment and common standards. Hence, the approach reflects both an economic and a political rationale. The recent push in African data protection legislation, with 37 African countries having enacted data protection legislation, is in many instances inspired by or related to regulatory developments in the EU. The EU's Global Gateway initiative aims to mobilize up to EUR 150 billion in investments across Africa, with digital transition listed as a priority area. European operators remain among the top five telecom providers on the continent. While the South African company MTN holds the leading position, UK-based Vodacom and France's Orange follow closely, with approximately 200 million (16 per cent market share) and 150 million subscribers (12 per cent market share), respectively.[10]

In contrast to the EU's values-based approach, the US digital strategies, driven by the private sector, tend to resist stringent regulations that might constrain its technology giants (e.g. Google, Amazon, and Meta). This more business-centric, laissez-faire approach has supporters across the continent, particularly among digital entrepreneurs who view the EU's norm externalization as a constraint on local innovation. While sound regulatory frameworks are essential for promoting growth and safeguarding individual rights, they are a necessary yet not sufficient factor. Their effectiveness depends on alignment with legal practices and on-the-ground realities.

While the EU remains the most influential external actor in regulatory norm-setting, India has also emerged as a key player in shaping Africa's digital governance through its Digital Public Infrastructure initiative, especially through the development of digital identity (Aadhaar), digital payments (e.g. Unified Payments Interface), e-commerce (e.g. Open Network for Digital Commerce), and healthcare solutions. In contrast to China's highly centralized and state-controlled model, India's digital framework is more citizen-centric, focusing on open-sources platforms and financial inclusion. Its DPI tools started to shape regulatory thinking in areas such as payments interoperability and financial inclusion, often through partnerships with African governments and central banks. However, despite its democratic

[7] Ibid.
[8] Jane Munga, *Resetting US Africa Foreign Policy in Trump 2.0: Technology as a Driver*, Megatrends Policy Brief 34 (Megatrends Afrika, March 2025), 5.
[9] Tafese, *Advancing EU–Africa Digital Partnerships amid Growing Geopolitical Competition*, 11.
[10] Nate, "Demystifying External Actor Influence in Africa's Technology Sector".

aspirations, India also holds the record for the most frequent internet shutdowns of any country, raising questions about its commitment to digital freedom.[11]
In a multipolar, digital world, international actors are competing across the African continent for market and normative influence. Even India and the EU, who are not typically seen as direct competitors in the same way as US and China, are nonetheless competing to some extent in Africa's digital space as both promote distinct models of digital governance and infrastructure, which may create interoperability gaps and regulatory fragmentation.

African Strategies in a Multipolar World

Multipolarity creates both opportunities and challenges for African agency. On the one hand, it enhances Africa's ability to choose among alternatives, which can strengthen leverage and agency. As multiple actors propose competing technical standards and regulatory frameworks, African countries can shape common, interoperable frameworks that reflect their interests rather than simply importing external models. Even amid the intensifying techno-geopolitical competition, African governments and companies can expand their options and assert interests independently. In Kenya, for instance, Safaricom employs a multi-vendor strategy to collaborate with providers from different countries in various aspects of their business (e.g., technology solutions, financial services, and digital marketplaces).[12]

On the other hand, multipolarity can lead to diversified dependency. Reliance on a range of external actors – whether foreign governments, companies or technologies, can still undermine and challenge African countries' digital sovereignty, and even threaten national and regional security. In Mauritius, for instance, the government has relied on foreign companies for surveillance technology, including providers from India, China, and Israel.[13] Critics argue that the mass surveillance not only threatens the country's democratic fabric but also, through the purchase of foreign technology, creates additional dependence on external actors.[14]

Moreover, the competition between varied technological systems can result in incoherent policies, inconsistent or conflicting regulatory alignment, and fractured implementation. The promise of strategic autonomy might be constrained by weak state capacity, restricted technical know-how, coordination challenges, and diverging interests among governments, business, and citizens. Thus, while multipolarity offers more choices, it does not guarantee that these choices will prioritize Africa's long-term interests, especially when it comes to digital and tech sovereignty.

To foster a more resilient and inclusive digital future, African governments need a clear vision for the digital development of their countries, in addition to having a sophisticated grasp of each external offer, including both related opportunities and possible risks. The multiplicity of external actors allows African governments to negotiate partnerships that align with national interests.

Collaboration at the continental level will also be key. While the African Union (AU) has a vision of building a secured digital single market by 2030, fragmented interests among its member states and inconsistent implementation hinder progress toward this goal. Experts

[11] Astha Rajvanshi, "How Internet Shutdowns Wreak Havoc in India", *Time*, August 15, 2023.
[12] Andrew Wooden, "Nokia and Safaricom Deploy FWA 5G Slicing Trial in Africa", *Telecoms*, August 22, 2022.
[13] "In the Shadow of Mass Surveillance", *Mauritius Times*, February 7, 2025.
[14] Ibid.

suggest that achieving this vision requires increased public and private investment in digital infrastructure, along with comprehensive policy and regulatory reforms.[15]

Implications for the EU and Germany

In an increasingly competitive and multipolar digital landscape, the EU and Germany must articulate a clear and coherent proposition for their digital engagement in Africa. Beyond emphasizing norms-based approaches, they should demonstrate tangible benefits in terms of long-term sustainability, interoperability, and trust.

Leveraging the EU's strength in regulatory governance, Germany and the EU should deepen strategic ties with the AU and regional economic communities to support regulatory harmonization and digital sovereignty. Joint efforts toward building a secure and interoperable Digital Single Market for Africa – aligned, where appropriate, with European standards – can support both African agency and EU–Africa economic integration.

To increase credibility and impact, the EU and Germany should prioritize a few high-quality, high-visibility flagship projects, co-developed with African partners, tailored to local needs, and designed for scalability and inclusivity. Efforts should also be made to expand digital public infrastructure, support African tech entrepreneurship ecosystems (e.g. through partnerships with innovation hubs like iHub in Kenya or Co-Creation Hub in Nigeria), and foster digital skills development. European financial instruments – such as Global Gateway and NDICI should be deployed strategically to attract private investment.

Lastly, Germany can play a key role in shaping a more coordinated European approach. The Federal Ministry for Economic Cooperation and Development (BMZ), through its close ties with the Smart Africa Alliance, is well-positioned to facilitate dialogue and joint initiatives that align African and European digital priorities.

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[15] Baidy Sy, "Building a Connected Africa: The Path to a Single Digital Market and a Prosperous Future" (World Economic Forum, 23 March 2023).

Beyond Polarization: Rethinking "Multipolarity" in Ethiopia's Urban Space

Biruk Terrefe

Passengers transiting through Addis Ababa's Bole International Airport over the past two years may have noticed a striking juxtaposition: digital billboards broadcasting news from Russia Today alongside televisions airing CNN and BBC. British, Russian, and American broadcasters are presented side-by-side in one of Africa's busiest airport terminals. This anecdote is symbolic of a larger point. Attention to infrastructure and urban space across Africa challenges our dominant narratives of multipolarity, which are often associated with fragmentation and polarization.[1] Instead, these spaces offer insights into a blending of actors, into a hybridization of ideologies, and into entanglements of global actors curated in this case by the Ethiopian government to serve its pragmatic interests.

The post-World War II international order, long dominated by Europe and the United States (US), is being dismantled in real time. Today's multipolarity, while not unprecedented, has become more pronounced and assumes forms distinct from earlier eras. It is unfolding across two interconnected arenas. First, the global economy, marked by the relative retreat of industrial Europe and the US, anchored by China as its central node, and shaped by the growing weight of Brazil and India. And second, the global security architecture, currently characterized by Russia's continued criminal onslaught against Ukraine, and Israel's genocide in Gaza,[2] which has put a final nail into the coffin of international law, making the West's double standards explicit.[3] Countries such as Turkey, Saudi Arabia, and the UAE are cultivating their own spheres of influence, while wars in the Horn of Africa are treated as mere footnotes and are synonymous with a humanitarian system that has all but collapsed.

In the following, I want to situate my analysis of these shifts within infrastructural and urban spaces. At these sites, "multipolarity" is not characterized by the increased polarization around multiple nodes, but as new forms of hybridization and a blending of global actors, their ideologies, and practices. Three particular points are important to consider.

Global Models, Converging Actors and Local Hybridization

First, urban spaces have always been sites where diverse models, ideas, and technologies converge and are reassembled in ways that transcend geopolitical polarization. Addis

[1] Tobias Bunde and Sophie Eisentraut. "Introduction: Multipolarization", in *Munich Security Report 2025: Multipolarization*, ed. Tobias Bunde, Sophie Eisentraut, and Leonard Schütte, 13–31 (Munich Security Conference, February 2025).
[2] United Nations General Assembly (UNGA), *Special Committee to Investigate Israeli Practices. A/79/363: Report of the Special Committee to Investigate Israeli Practices Affecting the Human Rights of the Palestinian People and Other Arabs of the Occupied Territories* (UNGA, Seventy-ninth Session, 20 September 2024).
[3] Jens Thurau, "Merz invites Netanyahu to Germany despite ICC arrest warrant", *Deutsche Welle*, March 3, 2025.

Ababa's current redevelopment and aggressive sanitization offers a useful canvas to examine this. Since coming to power in 2018, Prime Minister Abiy Ahmed and the ruling Prosperity Party have focused on the beautification of the country's urban centres.[4] Displacing thousands from the city centre, the administration has allotted large plots of land to international developers and real estate companies. The government has widened walkways, built bike lanes, a riverside promenade and redeveloped public spaces, including museums and parks. The municipal and federal government have megaproject offices through which they coordinate and curate engagements with international consultants, construction companies, designers, and investors. These officials and offices are intermediaries translating domestic political goals into a patchwork of global inputs. Chinese construction companies, Turkish contractors, Emirati financiers, and Western urban design consultants have all played a role in reshaping Addis Ababa's landscape.

In 2018, Prime Minister Abiy Ahmed announced the 'La Gare' project, a 36-hectare redevelopment led by Abu Dhabi-based real estate company Eagle Hills. The plan included luxury residential apartments, multiple 5-star hotels, shopping centres, office spaces and recreational areas.[5] Although privately financed, the project was facilitated by the UAE government, which has been Abiy Ahmed's primary backer.[6] Eagle Hills outsourced some of the design work for the masterplan to Atlanta-based Smallwood Inc,[7] while the construction was awarded to China Communication Construction Company Limited (CCCC). This convergence is not incidental and exemplifies the complex entanglements that define contemporary urban development in Africa, where Gulf capital, American design, and Chinese construction intersect. Rather than reinforcing narratives of fragmentation and competition, such constellations exemplify pragmatism and hybridization in cosmopolitan urban spaces. Multipolarity, as an analytical framework, tends to treat countries as monoliths by cataloguing heterogenous actors within the national containers. This case reminds us that private actors do not always dance to the tune of their governments.

A similar dynamic unfolds in large-scale infrastructure programmes. While China's Belt and Road Initiative and the G7's Partnership for Global Infrastructure and Investment (PGII), which includes the European Union's Global Gateway programme, are often portrayed as mutually exclusive arenas of geopolitical competition,[8] many significant projects occur entirely outside these headline-grabbing frameworks. Recipient governments frequently blend funding and expertise from a range of sources, creating entangled constellations that defy the neat categories of these official programmes. One recent example is the Awash-Weldiya-Shire Railway in Ethiopia.[9] The project involved financing from the Turkish Exim Bank and Credit Suisse (backed by Swedish, Danish and Swiss export credit agencies), as well as contractors such as Turkey's Yapi Merkezi, France's Systra, Swedish Swiss ABB and China's CCCC. By curating such a diverse group of actors, the Ethiopian government demonstrated that global infrastructure initiatives are often less about zero-sum rivalry than about pragmatic, multi-actor partnerships.

[4] Biruk Terrefe, "Urban Layers of Political Rupture: The 'New' Politics of Addis Ababa's Megaprojects", *Journal of Eastern African Studies* 14, no. 3 (2020): 375–95.
[5] "LaGare – Ethiopia".
[6] Melaku K Gebru, *The United Arab Emirates Engagement in Ethiopia: Implications for the Horn of Africa's Geopolitical and Security Landscapes*, Megatrends Policy Brief 35 (Megatrends Afrika, March 2025).
[7] "La Gare Mixed Use Masterplan" (Smallwood Inc.).
[8] Jessica DiCarlo and Seth Schindler, "Introduction: Geopolitics, Infrastructure, and the Emergent Geographies of US–China Competition", in *The Rise of the Infrastructure State* (Bristol University Press, 2022), 1–10.
[9] Yunnan Chen, *Laying the Tracks: The Political Economy of Railway Development in Ethiopia's Railway Sector and Implications for Technology Transfer*, Working Paper no. 2021/43 (Washington, D.C.: China Africa Research Initiative [CARI], School of Advanced International Studies (SAIS), Johns Hopkins University, 2021).

Curating Partnerships and the Politics of Hedging

Second, the Ethiopian government has been particularly effective at curating multiple international partnerships simultaneously across different sectors to serve domestic goals rather than aligning with a single "pole". In February 2025, the face of UK Deputy Prime Minister Angela Rayner appeared on billboards across Addis Ababa, welcoming her on an official state visit that included an appointment at the newly inaugurated Ethiopian Securities Exchange, established as part of a series of IMF-backed economic reforms in which the UK played a key role.[10] The next day, the same billboards welcomed Valentina Matviyenko, the Chairperson of the Federation Council and the third-highest-ranking official in the Russian government. Her visit included the opening of a Sputnik Media office in Addis Ababa and a tour of the newly renovated National Museum, which had actually been financed by the French.[11] In 2024, the Confucius Institute at Addis Ababa University launched a Mandarin language training programme for Ethiopian police officers, intended to "enhance cultural exchanges and collaborate on security matters".[12] And in November 2024, Addis Ababa signed a power purchase agreement with UAE-based Phoenix group to support its bitcoin mining operations, in order to attract foreign currency by selling "stranded" energy to bitcoin mining companies, generating up to USD 1 billion.[13] Phoenix Group is backed by Abu Dhabi's International Holding Company,[14] run by Tahnoun bin Zayed Al Nahyan, a member of the Emirati royal family and the national security advisor of the UAE.[15]

In short, Addis Ababa exemplifies how IMF- and World Bank-backed economic reforms, Emirati state-capitalism, Chinese surveillance technology and Russian media strategies coalesce in a single urban space. The Ethiopian government, in this instance, manages its partnerships according to its interests, despite significant structural asymmetries and dependencies. Whether this results in long-term political and economic autonomy remains questionable, but increased geopolitical competition has given policymakers in the majority world some leverage. This has been visible, for example, in the growing "financial statecraft of borrowers" that are now able to negotiate with multiple lenders to secure more favourable terms.[16]

Everyday Geopolitics on the Streets of Addis

Finally, urban spaces reveal the everyday realities of geopolitical entanglements that complicate dominant narratives of polarization. Ethiopia's bold national e-mobility strategy, which includes a ban on new petrol and diesel vehicle imports since 2024, targets up to 500,000 e-vehicles by 2030. While some EU countries are involved with technical assistance

[10] "UK Deputy Prime Minister Says Ethiopia's Economic Transformation Remarkable" (Fana Media Corporation).
[11] "Sputnik Officially Opens Africa Media Hub in Addis Ababa" (Fana Media Corporation); The French Agence Française du Développement (AFD) financed the restoration of the National Palace into a public museum and park with a grant of EUR 25 million.
[12] "Chinese Language Training Launched to Enhance Police Capacity in Ethiopia", *XinhuaNet*, February 23, 2024.
[13] Fred Harter, "Ethiopian Turns to Bitcoin Miners to Power Growth and Green Energy", *The Africa Report*, November 4, 2024.
[14] Sharma Alkesh, "Abu Dhabi-listed Phoenix Group Enters Africa with Ethiopian Bitcoin Mining Deal", *The National,* January 23, 2025.
[15] In anticipation of Trump's decision to expand the US's strategic bitcoin reserve, the Ethiopian government is positioning itself as "crypto-currency" friendly country, directly contradicting the IMF's advice to recipients of credit facilities. "Government Fine-tunes its Bitcoin Strategy with an Eye on Trump's Announcements", *Africa Intelligence*, May 29, 2025.
[16] Alexandra Zeitz, *The Financial Statecraft of Borrowers: African Governments and External Finance* (Cambridge University Press, 2024).

and regulatory support, helping to shape standards for charging infrastructure and grid integration, Chinese brands such as BYD, Chery, and the Guangzhou Automobile Group, as well as Chinese-manufactured Volkswagen vehicles, dominate Addis Ababa's streets. France's TotalEnergies has constructed charging infrastructure, while Japanese company Musashi has been involved in the introduction of e-motorbikes. In 2023, the German embassy lobbied for the import ban of the Chinese-manufactured Volkswagen electric vehicles to Ethiopia, citing that these cars had not be legally authorized by the company.[17] This ban was lifted in early 2024. This exemplifies the complex and deeply interconnected nature of the global economy: Volkswagen was one of China's earliest major international automotive partners. And yet, faced with declining sales in China, Chinese manufactures began selling Volkswagen cars in a third country, sparking a diplomatic dispute between Germany and China, mediated, in this case, through Ethiopian authorities and customers.

This underscores the layered and negotiated nature of Ethiopia's mobility transition, where state policies, multinational corporations, and local bureaucracies continuously interact and contest policies. Far from being a simple multipolar rivalry, Ethiopia's e-mobility strategy is co-constructed by a number of global actors, highlighting the everyday geopolitics of urban infrastructure and mobility.

Conclusion

Ultimately, urban spaces and infrastructure corridors are not fractured zones of global competition but concentrated sites of multilayered entanglement. They are sites where global rivals and their infrastructures co-exist, interweave, and negotiate space and attention. Whether we are talking about Russian media buildings, Emirati bitcoin companies, Chinese-manufactured German cars, or British economists advising on the liberalization of the Ethiopian economy, urban spaces are melting pots of divergent ideologies, policies, and actors.

These spaces offer a unique lens on geopolitical dynamics, which are often obscured by headline-grabbing narratives of total rivalry. In reality, hybridity and entanglement are the norm. Rather than prioritizing policies of disengagement and isolation vis-à-vis geopolitical rivals, principles of pragmatism and complementarity might yield more productive partnerships, even in times of growing geopolitical tension and competition.

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[17] "Ethiopia Suspends Chinese Assembled Volkswagen EVs at Firm's Request", *The Reporter*, June 15, 2023.

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