



AFRICAN STRATEGIES

European and global
approaches towards
sub-Saharan Africa

By
Giovanni Faleg and Carlo Palleschi



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75015 Paris

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The authors

Giovanni Faleg is a Senior Analyst at the EUISS responsible for analysis and research on sub-Saharan Africa. He holds a PhD in European Studies from the London School of Economics and Political Science (2014).

Carlo Palleschi is a trainee at the EUISS, working on sub-Saharan Africa. He holds a Master's degree in Economics from La Sapienza University in Rome (2018).

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The EUISS Chaillot Paper series

The *Chaillot Paper* series, launched in 1991, takes its name from the Chaillot hill in the Trocadéro area of Paris, where the Institute's first premises were located in the building occupied by the Western European Union (WEU). The hill is particularly known for the Palais de Chaillot which was the site of the signing of the UN Universal Declaration of Human Rights in 1948, and housed NATO's provisional headquarters from 1952 until 1959.

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EXECUTIVE SUMMARY

The partnership between Europe and Africa has reached a critical juncture in 2020. The EU is working on a new strategic approach towards the continent. Negotiations for a new partnership between the EU and the African, Caribbean and Pacific (ACP) countries, to replace the Cotonou Agreement, are ongoing. The sixth Summit of European Union and African Union Heads of States and Governments will take place in October this year, defining the strategic priorities and providing overarching political guidance for future relations between the two continents in a multipolar world.

This *Chaillot Paper* analyses the evolution of EU member states' strategies towards sub-Saharan Africa, as well as those of global actors, addressing two basic questions: what are the points of convergence and divergence in EU member states' strategies, and can a coherent, joint EU strategy emerge as a result, being more than the sum of its parts? What are the possible faultlines of strategic competition between the EU and the global players engaged in the 'new scramble for Africa'?

The volume shows that there is broad consensus between the EU and its member states on how to manage their relations with sub-Saharan Africa. There are six main common denominators: (i) fostering inclusive economic growth; (ii) achieving peace and security; (iii) a narrative based on governance, rule of law, and the protection of human rights; (iv) commitment to a rules-based, multilateral order; (v) sustainability; (vi) connectivity and digitalisation.

The publication also shows that there is significant variation in global powers' strategies towards sub-Saharan Africa, and only limited synergies with European strategies. In the following areas, Europe is likely to face adverse competition:

- > **Battle of strategic narratives.** In a multipolar world, we can expect sub-Saharan Africa, but also North Africa, to become the frontlines of this conflict. Here, attempts to discredit the EU and fuel anti-Western rhetoric will intensify and assume a variety of forms, in an effort to make geopolitical gains or widen the gap between Europe and Africa.
- > **Transition processes.** The EU's foreign policy based on the promotion of democracy, rule of law, fair and transparent elections, and peaceful transitions will be increasingly confronted with other actors who, depending on their interests, may support authoritarian leaders, fraudulent elections, violent state repression, as well as turn a blind eye to political violence and human rights violations.
- > **Militarisation in the Horn of Africa.** The region has experienced a steady build-up of foreign military forces on land, at sea and in the air since the early 2000s. While there has been little direct hostility between the different foreign military forces, a heavy international security presence in the region heightens the risks of incidents and proxy confrontation.
- > **Geopolitics of the Indian Ocean.** New alliances and dynamics are forming here. India and Japan have enhanced strategic dialogue in order to balance China's rise in the area. Russia and Saudi Arabia have also stepped up their presence in the region. Looking ahead, the geopolitical relevance of coastal states and islands in the Indian Ocean is set to increase, given their strategic location near transit routes.
- > **Infrastructure development.** Sub-Saharan Africa's gap in physical and digital infrastructure is huge. With the implementation of the African Continental Free Trade Area

(AfCFTA), the urgent need to invest in infrastructure development on the continent is even more compelling. Global power competition for infrastructure financing and development is only set to grow.

There are nonetheless entry points for international cooperation, in particular:

- > **India's and Japan's** commitment to fostering strategic convergence in the Pacific and Indian Ocean, and by extension in Asia and Africa, is in line with the EU's priority of bolstering connectivity. There is room for cooperation to ensure maritime security, boost trade and economic growth, advance a rules-based international order, and counter narratives that are opposed to or at odds with shared values.
- > Cooperation between **Europe, China and African countries** on joint infrastructure projects could strengthen the African entrepreneurial environment, foster confidence in EU companies and mitigate some negative effects of China's Belt and Road strategy.

- > Room for cooperation between the **EU and the UK** remains substantial despite Brexit, as is the alignment in terms of values, narratives and strategic objectives. If not complicated by the intricacies of negotiations, the continuation of a close relationship between the two sides of the Channel can be expected.

A final question addressed in this *Chaillot Paper* is whether the Covid-19 pandemic can change strategic postures in Europe, and those of other global actors. Overall, sub-Saharan Africa will remain an area where the EU has significant security and economic stakes. The partnership between the two continental blocs is unlikely to be affected. Global powers are also likely to maintain their presence in the African continent. The EU can turn the Covid-19 challenge into an opportunity to boost the development of a new concept of European power in line with African needs and strategic orientations for the next decade, reinforcing its advantage *vis-à-vis* other global actors, minimising the fragmentation of EU member states' approaches and building 'cooperative regional orders', which can not only bring Africa and Europe closer together, but also mitigate power competition.

INTRODUCTION

In December 2019, Ursula von der Leyen made her first visit outside the EU, as President of the European Commission, to Ethiopia.¹ The visit was a political statement, to send a clear signal of the importance of Europe–Africa relations for the new Commission. Two months after her visit, European Council President Charles Michel also travelled to Addis Ababa, to attend the annual African Union (AU) Summit on 9 February 2020, and taking this opportunity to highlight that a fresh start in the partnership between Europe and Africa would be a priority of his mandate.² Less than three weeks later, the EU High Representative for Foreign Affairs and Security Policy/Vice-President of the European Commission, Josep Borrell Fontelles, also went on his first official mission to Africa, travelling to Sudan and Ethiopia and attending the tenth AU–EU Commission–to–Commission meeting that took place in Addis Ababa on 27 February.³

Considering that the three top EU leaders took office only on 1 December 2019, the fact that each and all of them travelled to Addis Ababa – where the AU is based – in the first three months of their mandate could not be a clearer sign of the strategic importance of Africa for the EU’s foreign policy. To compare with their predecessors, the first foreign trip of President Jean-Claude Juncker was to Ukraine in March

2015, while High Representative Federica Mogherini’s first sub-Saharan Africa trip took place in Niger ‘only’ in November the same year. Clearly, the partnership between Europe and Africa has reached a critical juncture in 2020. The EU is working on a new strategic approach towards Africa, on the basis of the joint communication ‘Towards a comprehensive strategy with Africa’ released by the European Commission and the High Representative on 9 March 2020.⁴ This year is also marked by the negotiation of a new partnership between the EU and the African, Caribbean and Pacific (ACP) countries, to replace the Cotonou Agreement.⁵ 2020 is finally the year of the sixth Summit of AU and EU Heads of States and Governments, commonly referred to as the AU–EU Summit, which is expected to define the strategic priorities and provide political guidance for the future Africa–EU partnership.⁶

Most importantly, at the dawn of the 2020s, Africa seems to be embarking on a decade of transformations, triggered by twenty years of sustained economic growth outperforming that of other continents, progress in regional integration underpinned by the creation of the African Continental Free Trade Area (AfCFTA), widespread diffusion of technological innovation accompanying the Fourth Industrial Revolution, and amid new hopes of democratic transitions

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- 1 European Commission, “President von der Leyen in Addis Ababa for her first trip as President outside the EU”, December 6, 2019, https://ec.europa.eu/luxembourg/news/president-von-der-leyen-addis-ababa-her-first-trip-president-outside-eu_fr
 - 2 European Council, “Speech by President Charles Michel at the official dinner of the African Union Summit in Addis Ababa”, February 9, 2020, <https://www.consilium.europa.eu/en/press/press-releases/2020/02/09/speech-by-president-charles-michel-at-the-official-dinner-of-the-african-union-summit-in-addis-ababa/>
 - 3 European External Action Service, “High Representative/Vice-President Josep Borrell visits Ethiopia and Sudan as first visit to Africa”, February 9, 2020, https://eeas.europa.eu/headquarters/headquarters-homepage/75162/high-representativevice-president-josep-borrell-visits-ethiopia-and-sudan-first-visit-africa_en.
 - 4 European Commission and High Representative of the Union for Foreign Affairs and Security Policy, Joint Communication to the European Parliament and the Council: “Towards a Comprehensive Strategy with Africa”, *JOIN(2020) 4*, March 9, 2020, https://ec.europa.eu/international-partnerships/system/files/communication-eu-africa-strategy-join-2020-4-final_en.pdf.
 - 5 The Cotonou Agreement, adopted in 2000, was initially set to expire in February 2020. Negotiators from the EU and the African, Caribbean and Pacific (ACP) countries agreed on February 17 to extend until December 2020, due to a lack of progress in the negotiations.
 - 6 The sixth AU–EU Summit is expected to be hosted by the EU in October 2020.

in several African countries. As a new narrative describing Africa as a 'land of opportunities' has emerged in the international community, the EU has not been the only actor to look at the continent through fresh lenses. A number of global powers have started to engage, or have intensified their engagement, with Africa, projecting economic or political influence and creating new patterns of multipolar competition, which some observers have described as a 'new scramble for Africa'.⁷ This is happening at a time when the economic and technological confrontation between the US and China is intensifying, and its effects are rippling through the globe.

With EU-Africa relations at a strategic juncture in 2020 and a transformative decade ahead, the stakes are high. Agency on both sides will make a difference in defining the new character of the partnership. African agency is changing as a result of the new multipolar influences, giving national leaders more room to pick and choose preferred partnerships and agreements to maximise benefits, which may affect the way Europe is perceived among a wider pool of interlocutors.

From the EU side, the strategic pivot to Africa is happening after a period of turbulence in inter-continental relations. In the Sahel, where fundamental European interests are at stake, lack of cohesion and convergence among EU member states have been detrimental to the objective of addressing spreading instability and insecurity. In the Horn of Africa, the attempt to forge a comprehensive EU approach has fallen short of competing national interests, worsening security conditions due to the proliferation of violent extremism, intra-state violence and illicit trafficking, and reduced influence of the EU in relative terms due to growing geopolitical

The EU's strategic pivot to Africa is happening after a period of turbulence in inter-continental relations.

competition, especially in the Red Sea. The gap between the EU and its member states when it comes to strategic interests and approaches towards Africa can result in the EU's strategic pivot being weakened, if it is less than the sum of its (national) parts.

Unforeseen events should be also factored in. While strategies look at influencing long-term outcomes, exogenous shocks can produce systemic changes in the short-term. The Covid-19 pandemic may therefore be another important game changer.

Despite emphasis placed by the new European Commission on re-energising the partnership, all these challenges stand in the way of EU strategic ambitions. Short of clarity around the implications of the Covid-19 pandemic – a phenomenon about which much is still unknown – this *Chaillot Paper* charts the way forward by focusing on the evolution of and interactions between EU member states' and global actors' strategies towards sub-Saharan Africa, which are known but under-researched.⁸ The choice not to focus on the whole continent – from Algiers to Cape Town – is justified by the fact that several actors still de-link North and sub-Saharan Africa in their doctrines. Furthermore, it is in the sub-continent that most variation in strategic orientations can be observed. By adopting this perspective, the report seeks to answer two basic research questions: what are the points of convergence and divergence in EU member states strategies towards sub-Saharan Africa, and can a coherent, joint EU strategy emerge as a result, being more (and not less) than the sum of its parts? What are the possible faultlines of strategic competition between the EU and other global players engaged in the new scramble for Africa?

⁷ "The new scramble for Africa", *The Economist*, March 7, 2019, <https://www.economist.com/leaders/2019/03/07/the-new-scramble-for-africa>.

⁸ A comparative analysis of African agency and strategies, while undoubtedly useful to get a full picture, would go far beyond the scope of this publication. Hence, the analytical choice of the authors has been to focus only on "external" (European and global) strategies towards sub-Saharan Africa.

The *Chaillot Paper* addresses these questions, in an attempt to provide useful guidance to experts, policy-planners and decision-makers. It is important to note that this analysis focuses on the strategic level of engagement, meaning what actors want in their relations with sub-Saharan Africa, and how they plan to achieve those objectives based on the strategic approaches they have produced, whether as stand-alone documents or as part of broader foreign policy doctrines. It does not, however, analyse in depth what actors do, which would pertain to the execution of their foreign or security policies.

The text is structured as follows. Part I is devoted to European strategies. It first analyses EU member states' strategic profiles (chapter 1), shifts in their priorities (chapter 2), and their influence in terms of soft and hard power

(chapter 3). It then looks at the strategic implications of Brexit for EU-Africa relations (chapter 4) and concludes by examining the prospects and challenges for the EU's joint approach (chapter 5). Part II focuses on the main global powers (chapters 6 to 9), describing their strategic orientations and flagship initiatives in sub-Saharan Africa, and how they relate to European engagements. Based on the findings, the conclusion identifies common denominators (areas where EU member states' strategies converge), faultlines (areas where EU member states' strategies diverge) and geopolitical hazards (areas where the EU will face strategic competition with other global players). It also discusses the implications of this study for international cooperation, in light of the possible impact of the Covid-19 pandemic on the new scramble for Africa, specifically for the EU's strategic pivot to the continent.





An aerial photograph of a rural landscape in Sub-Saharan Africa, showing a grid of fields, a river, and a cluster of round huts. The image is monochromatic, with a blue tint. The text is overlaid on a white rectangular background in the center-left.

**EUROPEAN
STRATEGIES
TOWARDS
SUB-SAHARAN
AFRICA**

Many EU member states have paid renewed strategic attention towards the sub-continent since the late 2010s. In addition to those countries that traditionally prioritised sub-Saharan Africa in their strategic agendas, others have expanded or enhanced their strategic footprint. Africa has therefore gained centrality in national policy-planners' agendas, producing implications for EU strategy-making in terms of resetting common priorities. While the quantity and quality of strategic engagements with sub-Saharan Africa has grown, an important 'subtraction' should be also factored in: the United Kingdom's exit from the EU constitutes a major, standalone strategic shift, given the depth of relations between the UK and sub-Saharan Africa, affecting collective capacities, know-how and strategic thinking available at the EU level.

On that account, what has concretely changed in EU member states' strategies towards sub-Saharan Africa? What are their priorities, and where are they present or plan to expand their presence in the future? How do they project influence to advance strategic interests? Are the priorities set by the EU's common and comprehensive strategy (green transition, digital transformation, sustainable growth and jobs, peace and security governance, migration and mobility)¹ towards Africa in line with national strategies? Let us start answering these questions by providing a mapping of the African strategies developed by EU member states.

1 Op. Cit., "Towards a Comprehensive Strategy with Africa", p. 2.

CHAPTER 1

EU MEMBER STATES' PROFILES

The strategic profile of a member state derives from four qualitative indicators: (i) *interests*, indicating the extent to which sub-Saharan Africa contributes to the safeguard and promotion of a country's national interest; (ii) *priorities*, indicating whether sub-Saharan Africa is ranked as a top priority, compared to other areas, in the pursuit of a country's national interest; (iii) *engagement*, indicating the presence (or lack thereof) of high-visibility/high-impact foreign policy initiatives to support the pursuit of national interests in sub-Saharan Africa; (iv) a fourth element is the *institutionalisation of strategic objectives* into a fully-fledged doctrine or framework, whether this is part of a broader foreign policy strategy or is elaborated as a standalone 'Africa Strategy'.

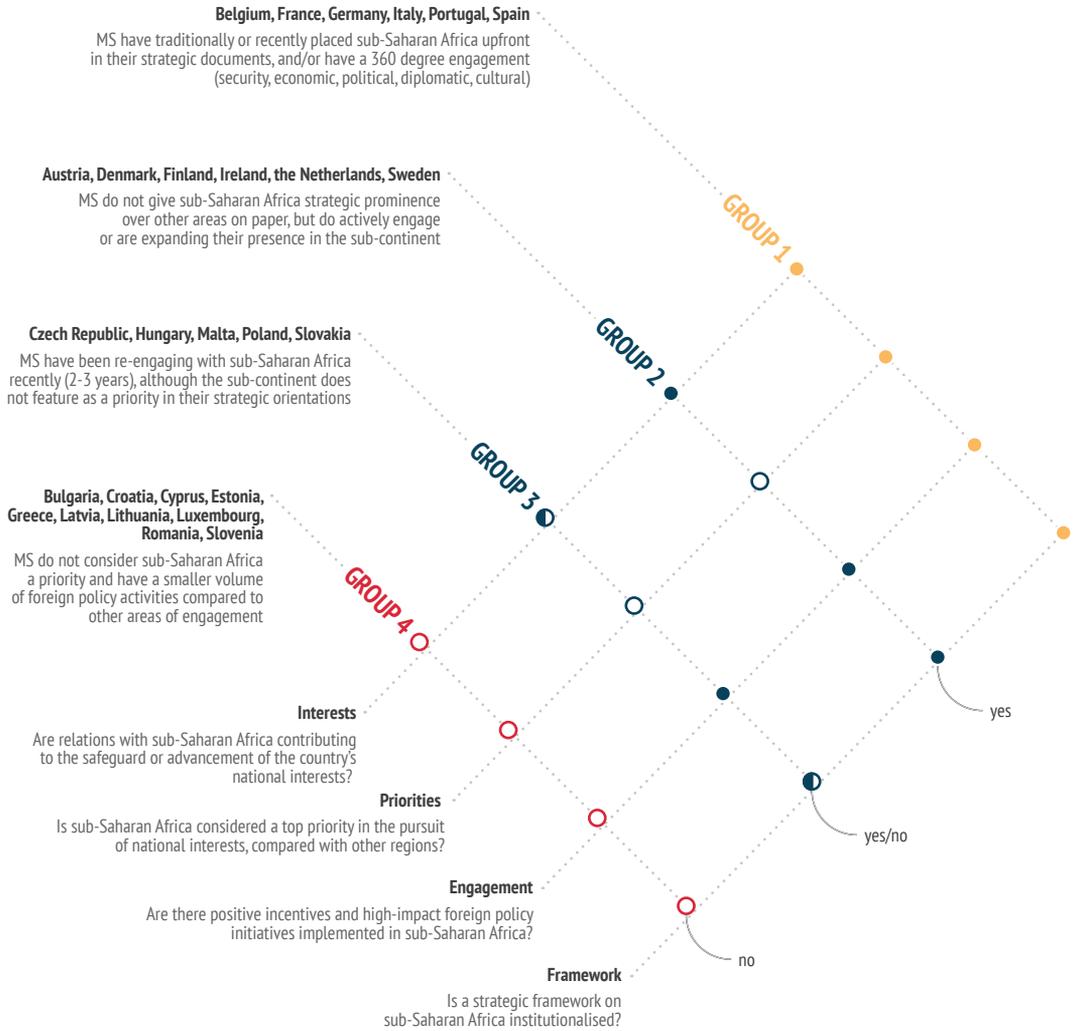
Based on these criteria, and on a set of quantitative data² gathered from member states, strategic profiles can be divided into four groups. The first group includes countries that consider sub-Saharan Africa as a top priority in the pursuit of their national interests. This is complemented by concrete engagements

as well as by an institutionalised strategic approach. The second group includes countries that have stakes in sub-Saharan Africa, although the sub-continent cannot be considered as a top strategic priority compared to other regions. Countries in this group project influence through hard and soft power means. The third group is very similar to the second one, with the only difference that the relevance of sub-Saharan Africa for the country's national interest is less evident, even though there have been concrete examples of engagement or re-engagement in the past number of years. Typically, this group includes countries that have recently expanded their strategic footprint in sub-Saharan Africa, and some of these countries could soon upgrade to the second group if re-engagement becomes systematic. Finally, countries in the fourth group do not prioritise sub-Saharan Africa in their strategies, have no or limited interests at stake in the continent, and consequently no formal doctrine or substantial engagement compared to other regions.

² The data has been gathered and analysed by the authors and represented in visual form later in the chapter. Because not all 27 EU member states provided input, a quantitative benchmarking of countries' strategic profiles could not be developed. However, data received was used to complement or corroborate the qualitative indicators.

Strategic profiles

Categories of EU member states' engagement in sub-Saharan Africa



Member states belonging to the first group, due to several factors such as their history or geographical position, have longstanding relations with sub-Saharan Africa, and a clear understanding of their national interests in the sub-continent, combined with a clear prioritisation in the foreign policy agenda. Their engagement is established, and spans across

multiple sectors. Some of them have a specific focus on one or more sub-regions, such as Belgium in the Great Lakes and Portugal in Southern Africa. Others, like Italy and Spain, have only in recent years reasserted the centrality of sub-Saharan Africa in their foreign policies, after a period of political disengagement.³ Germany and France are by far the two biggest EU

³ This does not mean that those countries have been absent from sub-Saharan Africa. The Italian private sector, for instance, has been significantly engaged even when Italy's foreign policy focused on other regions, such as the Middle East and North Africa.

players in the sub-continent, with the latter outweighing any other member state with regard to hard power and military deployments.

The second and third group are the ones that are most interesting from an analytical point of view, because of the evolution of member states' interests and priorities. The second group includes the main donors, which have been systematically engaged in sub-Saharan Africa as part of their contribution to international development (such as Denmark, Sweden and Finland), and trade (the Netherlands). This group also includes Austria and Ireland, two countries that upgraded their engagement in the last few years, by issuing new national strategic frameworks (both in 2019), or opening new embassies throughout the African sub-continent, and scaling up their activities. The third group includes countries that traditionally did not have a strong strategic focus on sub-Saharan Africa, but revamped their strategies in the past 2-3 years, as a result of greater national interest in the area. This category is composed by the Visegrad Group (Poland, Czech Republic, Slovakia, Hungary) and Malta, which just released this year an ambitious Africa Strategy 2020-2025 based on trade, development and diplomacy, the first one in its history towards Africa. The fact that the Visegrad countries have stepped up their strategic role is particularly interesting, as they have revived old ties from the Soviet past, embracing greater commitment to development cooperation, economic relations and humanitarian aid, especially in African migrants' countries of origin. Nevertheless, it is worth underscoring that Visegrad countries display different levels

of engagement, as, for instance, the Czech Republic and Poland have been more actively committed in the field of defence and security, especially in the Sahel.

Finally, the fourth group includes member states who do not consider sub-Saharan Africa as a strategic priority. This does not mean that they are not engaged or have no relations with the sub-continent, but the quality and quantity of this interaction is not relevant from a strategic point of view and cannot be compared to other regions where their national interests are more clearly located. This group is very heterogeneous: on the one hand, we have countries, such as Greece, Bulgaria or Romania, that would begin from a good starting point if they decided to upgrade the strategic relevance of the sub-continent in their foreign policies; on the other hand, we have other member states, for instance Lithuania, Slovenia or Cyprus, that are taking the first steps and for whom increasing their strategic engagement in the continent would require a remarkable economic and political effort. Estonia is currently preparing its first Africa strategy.

In recent years, several member states have published new strategic documents⁴ on sub-Saharan Africa, updating their approach with a fresh focus and a balanced analysis of risks and opportunities, while others plan to release their strategies in the near future. The table on pages 14-16 provides a list of the main documents and frameworks to date:

⁴ The absence of a fully-fledged 'Africa Strategy' as a standalone document cannot be interpreted as a lack of interest. For instance, Belgium, France, Italy and Portugal do not (yet) have one consolidated document guiding their approaches, but the continent is considered a top priority in all other strategic documents. As a matter of fact, several member states do not have a fully comprehensive strategy for Africa, but rather focus on some specific aspects, for example economic ties and development cooperation (such as Austria and Sweden), or mention Africa in their national programmatic strategic documents (such as Bulgaria, Denmark, Finland, France, the Netherlands, Poland, Slovakia and Slovenia). Countries with a fully-fledged strategy towards continental Africa include: Germany, Hungary, Ireland, Malta and Spain. As of June 2020, a strategy towards continental Africa is under preparation in the following countries: Czech Republic, Estonia, Finland, Italy.

Strategic documents

List of EU member states' policy frameworks on sub-Saharan Africa

Key

Strategic documents
with a focus on Africa
or sub-Saharan Africa

Africa or sub-Saharan
Africa are included
in a broader national
strategic document

Country/Document	Focus
Austria	
Potentiale In Subsahara Afrika nutzen: Chancen für die österreichische Wirtschaft (only in German) 2019	Economic
Markteintrittsstrategien und Geschäftsmodelle für Subsahara Afrika (only in German) 2019	Economic
Working together. For our World. Three-Year Programme on Austrian Development Policy 2019–2021 2018	Development
Belgium	
(restricted documents)	
Bulgaria	
National Security Strategy 2018	Conflicts and illegal migration
National Defence Strategy 2016	Piracy and conflicts
Croatia	
National Strategy for Development Cooperation of the Republic of Croatia for the Period 2017-2021 2017	Development
Czech Republic	
Multiannual Territorial Strategy for sub-Saharan Africa Under preparation	Strategic
Strategy of the Czech Republic for the Support of Stabilisation and Development of the Sahel Countries for the Period 2018-2021 (only in Czech) 2018	Stabilisation and development of the Sahel
Multiannual Programme of activities for supporting countries of origin and transit migration for 2020-2022 2020	Humanitarian - development-peace
Denmark	
Foreign and Security Policy Strategy 2019-2020 2018	Security

The World 2030: Denmark's Strategy for Development Cooperation and Humanitarian Action 2017	Development
Estonia	
Estonia's Africa Strategy Under preparation	Strategic
Finland	
Finland's Government Programme 2019	Strategic
Finland's Africa Strategy Under preparation	Strategic
France	
France's Defence Strategy in the Indo-Pacific 2019	Defence
French Strategy in the Indo-Pacific "For an Inclusive Indo-Pacific" 2019	Strategic
Towards a World in Common: AFD Group 2018-2022 Strategy 2018	Development
Defence and National Security Strategic Review 2017	Defence and security
Germany	
An enhanced partnership with Africa: Continuation and further development of the Federal Government's Africa Policy Guidelines 2019	Strategic
The Africa Strategy of the BMBF. Creating Prospects! New Impetus for Cooperation with African Partners in Education, Science and Research 2018	Education and research
Pro! Africa: Promoting the prospects, taking the opportunities, strengthening the economies 2017	Economic
Africa and Europe: A new partnership for development, peace and a better future. Cornerstones of a Marshall Plan for Africa 2017	Strategic
Hungary	
Afrika Stratégia (only in Hungarian) 2019	Strategic
International Development Cooperation Strategy and Strategic Concept for International Humanitarian Aid of Hungary 2014-2020 2014	Development
Ireland	
Global Ireland: Ireland's Strategy for Africa to 2025 2019	Strategic
A Better World: Ireland's Policy for International Development 2019	Development
Italy	
Italy's Africa strategy Under preparation	Strategic

Luxembourg	
Luxembourg's General Development Cooperation Strategy: The Road to 2030 2018	Development
Malta	
Malta and Africa: a Strategic Partnership for 2020-2025 2020	Strategic
The Netherlands	
Investing in Global Prospects 2018	Development and trade
Working Worldwide for the Security of the Netherlands: An Integrated International Security Strategy 2018-2022 2018	Security
Poland	
Polish Foreign Policy Strategy 2017-2021 2017	Strategic
Multiannual Development Cooperation Programme 2016-2020 2015	Development
Slovakia	
Medium-term Strategy for Development Cooperation of the Slovak Republic for 2019-2023 2019	Development
Slovenia	
Slovenija in Podsaharska Afrika – s kom in kako dalje 2017 – 2021 (only in Slovenian) 2017	Strategic
Slovenia: Safe, Successful, Globally Respected. The Foreign Policy of The Republic of Slovenia 2015	Strategic
Spain	
III Plan Africa: Spain and Africa: Challenge and Opportunity 2019	Strategic
V Plan Director de la Cooperación Española 2018-2021 2018	Development
National Security Strategy: A Shared Project, By All and For All 2017	Security
Sweden	
Strategy for Sweden's regional development cooperation in Sub-Saharan Africa, 2016-2021 2016	Development

The strategic relevance of sub-Saharan Africa in many national strategies is also confirmed by the large number of flagship initiatives set up by member states, such as high-level summits and economic fora.

Due to its deep historical ties with the African continent, France is the only EU country with a longstanding tradition of African summits: the 'France-Africa Summit' was first organised in 1973 as a coordination meeting between France and francophone Africa. Over the last few years, high-level Africa summits organised by other member states have become much more common. For instance, Italy organised the Italy-Africa Ministerial Conference in 2016 and 2018 with the aim of offering 'further proof of [Italy's] renewed commitment, as it aims to lay the grounds for an equal and sustainable partnership with Africa.'⁵ In Hungary, the 'Budapest Africa Forum', has become a milestone event organised by the Hungarian government in 2013, 2015 and 2018, as part of the 'Global Opening', the Hungarian strategic foreign policy that is aimed at rebuilding and enhancing relations with African countries.

Many member states have launched initiatives with the specific objective to build or strengthen their economic partnerships with the African continent and support the internationalisation of their enterprises. Germany, for instance, made Africa the focus of its Presidency of the G20, with the launch of the Marshall Plan for Africa and

the Compact with Africa (CwA), whose primary objective is to increase attractiveness of private investment in Africa.⁶ In 2013 Poland launched the 'Go Africa' initiative, to increase 'the number of Polish investments in Africa, to strengthen bilateral trade and to promote Poland on African markets.'⁷ This approach has been confirmed by the Polish Foreign Policy Strategy 2017-2021, in which Poland committed itself to continuing to implement the 'Go Africa' programme.⁸ Ireland has set up various initiatives that confirm its dynamism in the region: in 2018, the Department of Foreign Affairs and Trade hosted the sixth Africa Ireland Economic Forum (AIEF), 'a flagship event that provides a key networking opportunity for African and Irish businesses to discuss opportunities in Africa'⁹, and in August 2019 launched the Africa Agri-Food Development Programme (AADP) 'to develop partnerships between the Irish Agri-Food Sector and African countries to support sustainable growth.'¹⁰

This plethora of initiatives demonstrates the increasing interest of member states towards Africa, while at the same time highlighting a certain fragmentation: if on the one hand the common denominator is to revive and enhance engagement in sub-Saharan Africa, on the other hand these scattered initiatives risk undermining the collective leverage that member states can have on their African partners, particularly *vis-à-vis* other global actors, as Part II of this report will show.

5 Ministry of Foreign Affairs and International Cooperation of the Republic of Italy, First Italy-Africa Ministerial Conference, May 18, 2016, <https://www.esteri.it/mae/en/sala stampa/archivionotizie/approfondimenti/prima-conferenza-ministeriale-italia.html>.

6 So far, twelve African countries have joined the initiative: Benin, Burkina Faso, Côte d'Ivoire, Egypt, Ethiopia, Ghana, Guinea, Morocco, Rwanda, Senegal, Togo and Tunisia.

7 Polish Investment & Trade Agency of the Republic of Poland, Speech of the Undersecretary of State in the Ministry of Economy Iłona Antoniszyn-Klik at the conference summarising the programme *Go Africa 2013*, 21 January 2014, https://www.paih.gov.pl/20130121/successful_year_for_polish_business_in_africa.

8 Ministry of Foreign Affairs of the Republic of Poland, *Polish Foreign Policy Strategy 2017-2021*, <https://www.gov.pl/web/diplomacy/what-we-do>.

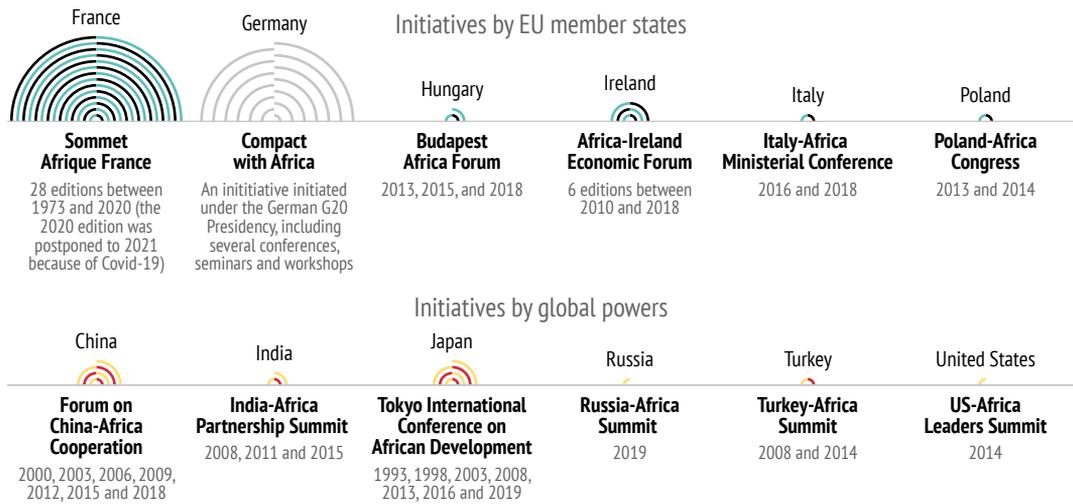
9 Department of Foreign Affairs and Trade of the Republic of Ireland, *Africa Ireland Economic Forum*, <https://www.dfa.ie/aief/about/>.

10 Department of Agriculture, Food and the Marine of the Republic of Ireland, *Africa Agri-food Development Programme (AADP)*, <https://www.agriculture.gov.ie/aadp/>.

Summit diplomacy

Summits with African countries held by European member states and global powers

Like other global powers, many EU member states became involved in 'the art of summitry', hosting continental summits with African leaders. This diagram shows some of the main initiatives organised in Europe and the rest of the world.



And what about the European Union?


Cairo, Lisbon, Tripoli, Brussels, Abidjan, Brussels
 2000, 2007, 2010, 2014, 2017 and 2020

CHAPTER 2

EU MEMBER STATES' PRIORITIES

In the past year, EU capitals have shifted attention, in response to new trends and dynamics in the African sub-continent, such as rising threats posed by violent extremism, new economic opportunities and growing multipolar competition. From a strategic point of view, there have been two types of shift: thematic and geographic.

THEMATIC PRIORITIES

In the past decade, but more specifically in the last 3-4 years, strategic priorities as outlined in national policy documents have changed remarkably. The diagram on page 20 shows what the key priorities for member states¹ were back in 2017. The political and strategic debate was dominated by migration and related security/humanitarian concerns, resulting from the European refugee crisis and the action plan agreed at the Valletta Summit on migration of 11-12 November 2015, which included the creation of the EU Emergency

Trust Fund for stability and addressing root causes of irregular migration and displaced persons in Africa. Since the onset of the refugee crisis and up until very recent times, the strategic motto in Europe-Africa relations, driven by EU capitals, has been 'migration, migration, migration', and largely overshadowed other policy priorities.

By 2020, the strategic discourse on migration has changed, and it is now framed in EU member states' strategies as a dialogue on 'migration and mobility', looking at the governance of migration and mobility within Africa and between Africa and the EU and enhancing the protection of migrants' rights, with a longer-term horizon no longer dictated by short-term political priorities. Relabelling took place in other dimensions, such as switching from climate change to 'green growth/transition'. Stabilisation efforts in the G5 Sahel remain partly driven by the need to address the root causes of migration and prevent forced displacement. However, the expansion of violent extremism in the region has broadened the strategic rationale for action, de-linking it from purely migration concerns.

¹ Evidence based on a report published by Friends of Europe in 2017: Kirsty Hughes, "EU-Africa Relations Strategies For A Renewed Partnership", Friends of Europe, May 2017, <https://www.friendsofeurope.org/insights/eu-africa-relations-strategies-for-a-renewed-partnership-what-next-for-relations-between-europe-and-africa/>.

Thematic priorities

Main strategic priorities of EU member states in 2017



MIGRATION



RADICALISATION

and counter-terrorism
in the Sahel and
the Horn of Africa



DEMOGRAPHICS

jobs and growth,
private sector
development



GOVERNANCE

democracy and
human rights



GENDER ISSUES



CLIMATE CHANGE

Data: Friends of Europe, 2017

At the same time, new priorities have emerged in national policymaking.² The overarching framework of this innovative approach is the new vision of Africa as ‘a land of opportunities’, which places great emphasis on the long-term positive economic and digital transformations, as well as waves of democratisation, which are taking place in many areas of the continent.

A crucial point consists in accelerating the demographic transition in order to harness a demographic dividend and at the same time support the demand side of the labour market through a massive plan of investment. It is within this framework that member states frame their strategy: investing in Africa represents a significant opportunity for European firms to enter a dynamic and constantly growing market, while at the same time promoting green and inclusive economic growth, unlocking African endogenous potential, for instance by promoting digital transformation, and generating employment and opportunities for African youth.

This emerging narrative is linked to the opportunities which arise from the AfCFTA and the need to enhance strategic partnership to support bilateral trade and investment. In this regard, providing support to African countries to improve connectivity, infrastructure development, economic diversification and market integration is seen as a priority for many member states such as Germany, Spain, France, Ireland, and the Netherlands.

From a security point of view, the pivot to conflict prevention, emphasis on human security and the need for an integrated approach to conflicts and crises appears in many strategies. It is also worth noting a return of soft power, with many member states increasingly committed to strengthen their engagement and intensify dialogue with African partners in fields such as education, research, cultural and language activities. Trends in strategic interests also vary across sub-Saharan Africa regions. For instance, in East Africa, three main categories of trends are predominant: maritime trade and security, promoting stability, and geopolitical positioning *vis-à-vis* other global players. In West Africa and the Sahel, security imperatives dictated by the need to counter insurgencies and terrorism must also take account of the growing threat posed by piracy in the Gulf of Guinea.

² Content analysis of EU member states strategic documents and interviews with national policymakers, (in person and over the phone) carried out by the authors between December 2019 and March 2020.

GEOGRAPHIC PRIORITIES

While many member states prioritise engagement in regions or countries where they have been traditionally present, new areas have gained strategic relevance due to the rise of new economic opportunities, the deterioration of the security environment, or the growing presence of global powers. For this reason, the geography of member states' projection in sub-Saharan Africa looks extremely dynamic. West Africa (namely the Sahel) and East Africa (the Horn) remain the regions drawing the highest strategic attention. Southern Africa is gaining relevance, due to the presence of South Africa as an economic and political hub; and so is the Indian Ocean, given its growing geopolitical importance as a bridge between Asia and Africa.

West Africa and the Sahel

Many member states identify West Africa as a priority region, with a special focus on the Sahel, the Lake Chad Basin and a greater interest recently for the Gulf of Guinea. This results from a combination of different factors, including management of migration flows, security threats as well as organised crime, illicit trafficking and piracy. However, the picture is not just about fragility. West Africa is the EU's largest trading partner in sub-Saharan Africa and the EU is West Africa's biggest trading partner. West Africa's economic growth prospects are also very strong, led by Ghana and Côte d'Ivoire, which are among the fastest growing economies in the whole continent. In 2018, six West African countries (Côte d'Ivoire, Senegal, Burkina Faso, Ghana, Benin and Guinea) ranked in the top ten in Africa in terms of

real GDP growth.³ Spain indicates West Africa and especially the Sahel as the priority regions to promote its partnerships; France, Germany, Ireland and Italy also describe this area as key for their national interests; Belgium has strengthened its presence, especially in the Sahel, since 2015; Slovenia has indicated Nigeria and Cabo Verde as priority countries; the Czech Republic and Poland focus mainly on the G5 Sahel; the Gulf of Guinea is perceived as a direct security concern especially by France, Spain and Portugal.

BOX 1 - Main security trends and challenges in West Africa

- > For Western Africa, the five years from 2014 until 2019 were the most violent ever with more than 12,000 violent events and 50,000 fatalities and violence has increasingly targeted civilians;⁴
- > Since 2016, more regions have been affected by violence, which has started spilling across borders to previously unaffected regions.

The Sahel

- > It remains highly affected by violence, especially in border regions: the number of reported violent events linked to militant Islamic group activity in the Sahel has been doubling every year since 2016 (from 90 in 2016 to 194 in 2017 to 465 in 2018);⁵
- > Climate change continues to worsen the environmental crisis with dramatic effects on human security, as

³ OECD/SWAC, "West Africa's growth prospects remain strong", *West Africa Brief*, 27 February 2019.

⁴ OECD/SWAC, *The Geography of Conflict in North and West Africa*, West African Studies (Paris: OECD Publishing, 2020), p.78, <https://doi.org/10.1787/02181039-en>.

⁵ "The Complex and Growing Threat of Militant Islamist Groups in the Sahel", Africa Center for Strategic Studies, Washington D.C., February 15, 2019, <https://africacenter.org/spotlight/the-complex-and-growing-threat-of-militant-islamist-groups-in-the-sahel/>.

the majority of the population depends on farming and pastoralism;⁶

- > Population in the Sahel is expected to nearly double by 2040.⁷

The Lake Chad Basin region

- > It remains a hotbed of armed violence. Around 2.5 million people (refugees and internally displaced persons) have been forced from their homes and 3.6 million people are grappling with food insecurity;⁸
- > Boko Haram remains resilient, especially in rural areas. A faction led by Abubakar Shekau is active in Borno and along the Cameroon–Nigeria border; a faction led by Abu Mas’ab al-Barnawi is active in the islands of Lake Chad and along the Niger border, with a presence in Yobe State.

The Gulf of Guinea

- > It is a key geopolitical area for shipping oil extracted in the Niger delta, as well as goods to and from central and southern Africa;
- > It remains a main security concern in terms of maritime insecurity, as (petro) piracy, kidnappings and acts of armed robbery at sea continue to be a persistent threat: the number of crew

kidnapped in the Gulf of Guinea increased by more than 50% from 78 in 2018 to 121 in 2019, representing over 90% of global kidnappings reported at sea;⁹

- > It is an important gateway for transatlantic drug trafficking from Latin America to Europe.

East Africa and the Horn

This region remains a priority in the ‘arc of instability’, although strategic engagement in the region has been affected by Brexit, given that the UK is a key influential player in the Horn, and by the growing attention given by many member states to the Sahel. The Horn of Africa is considered by several member states as a strategic region, particularly by France, Germany, Italy and Spain. Many countries identify Ethiopia as a strategic partner and a political ‘hub’ in sub-Saharan Africa, together with South Africa: Ethiopia is also explicitly indicated as a partner country for development cooperation by Austria, the Czech Republic, Denmark, Finland, Germany, Ireland, the Netherlands, Poland, Slovakia and Sweden. The attention towards the Horn of Africa is justified by a range of factors, including stabilisation in Somalia, maritime security through the protection of sea lines of communications (SLOCs), geo-strategic links between the Horn of Africa and the Indo-Pacific and Gulf regions, and the growing military (Djibouti) and economic presence of global powers.

6 International Crisis Group, “The Central Sahel: Scene of New Climate Wars?”, *Africa Briefing* no. 154, April 24, 2020, <https://d2071andvipowj.cloudfront.net/b154-sahel-new-climate-wars.pdf>.

7 Stellan Kwasi, Jakkie Cilliers, Zachary Donnenfeld, Lily Welborn and Ibrahim Maïga, “Prospects for the G5 Sahel countries to 2040”, Institute for Security Studies (ISS), Pretoria, November 2019, <https://issafrica.s3.amazonaws.com/site/uploads/war-25-1.pdf>.

8 OCHA, *Lake Chad Basin, Humanitarian Snapshot*, August 9, 2019, https://reliefweb.int/sites/reliefweb.int/files/resources/20190809_LCB_humanitarian%20snapshot_en.pdf.

9 International Chamber of Commerce, “Unprecedented number of crew kidnappings in the Gulf of Guinea despite drop in overall global numbers”, January 14, 2020, <https://iccwbo.org/media-wall/news-speeches/unprecedented-number-of-crew-kidnappings-in-the-gulf-of-guinea-despite-drop-in-overall-global-numbers/>.

BOX 2 - Main strategic and security challenges in the Horn of Africa

Maritime security

The Horn is a strategic chokepoint for international trade and Middle East oil flows: the Bab el-Mandeb strait is the jugular vein of trade between East and West. In 2016, 6.2 million barrels a day of crude oil, condensate and petroleum products were transported through the strait.¹⁰ In this regard, main challenges include:

- > The Yemeni war and its implications for insecurity in the Red Sea;
- > Piracy activities affecting SLOCs, maritime trade and energy provision;
- > Expansion and protection of strategic infrastructure for import of natural resources and goods and to penetrate African consumer markets.

Mainland security

State fragility in Sudan, South Sudan and Somalia continues to be a primary security threat. Main challenges include:

- > The spread of the terrorist threat posed by Al-Shabaab;
- > The contested legitimacy of Somalia's central government, hampered by the breakaway regions of Somaliland and Puntland;
- > The implementation of the peace deal between Eritrea and Ethiopia, and

implications for the regional integration process.

Multipolar competition

The integration of the Horn into the Indo-Pacific and Middle Eastern dynamics has created a new geostrategic space which requires member states to broadly rethink their strategic approach *vis-à-vis*:

- > The increasing militarisation and the growing economic presence of global powers, such as China, India, Japan and the Gulf States;
- > New patterns of realignment by countries in the Horn with players in the Gulf.

Central Africa and Great Lakes

This area has been and still is somewhat neglected in member states' strategic thinking, with the exception of Belgium, France and Ireland. Belgium, in particular, focuses its strategic attention on the Democratic Republic of Congo (DRC), where it is committed to support democratic institutions, transparency and good governance especially in the sector of mineral extraction and public finance. Ireland identifies the Great Lakes as a priority region in terms of poverty eradication and security stabilisation.

At the same time, Central Africa is a recipient region of many development programmes, with aid provided by France and Belgium in particular. The overlap between Ebola outbreaks and local conflicts in the region, specifically in Eastern DRC, has prompted the EU and member states to step up commitment to face a deteriorating humanitarian crisis.¹¹

¹⁰ US Energy Information Administration, "The Bab el-Mandeb Strait is a strategic route for oil and natural gas shipments", , August 27, 2019, <https://www.eia.gov/todayinenergy/detail.php?id=41073>

¹¹ European Commission, European Civil Protection and Humanitarian Aid Operations, "EU commits an additional €3.5 million to tackle Ebola", June 13, 2019, https://ec.europa.eu/echo/news/eu-commits-additional-35-million-tackle-ebola_en

Southern Africa

Southern Africa is gaining strategic relevance due to the presence of African powerhouses. South Africa, in particular, is the strongest economy in the region and a main economic and political partner of EU member states at the continental level. It is worth noting that even those member states that are less engaged in the continent have established a diplomatic presence in South Africa. The discovery of energy resources and the growing threat posed by violent extremism in the northern Mozambique region of Cabo Delgado¹² are increasingly drawing the strategic attention of many EU capitals, as is Angola's growing political leverage in the region. A growing number of EU member states has therefore a strategic interest in this region, including Italy, Sweden, Spain, Finland, The Netherlands, Germany, France and Portugal.

Indian Ocean

This region is not (yet) a priority for many member states, but trends indicate its growing relevance for African geopolitics in the near future. France is actively engaged in the Indian Ocean, with a comprehensive strategy which foresees a deeper integration between the Indian and Pacific Ocean as part of a larger opening towards Asia: as set out by President Macron in his speech at Garden Island, Sydney, on 2 May 2018, the French Indo-Pacific strategy is a holistic response to regional challenges, for which France has to act as a mediating, inclusive and stabilising power.

The geopolitical concept of the Indo-Pacific region responds to the greater interconnection between Asia and Africa, the integration of the Horn of Africa in this category and the growing engagement of global powers in the Indian Ocean, mainly China, Japan and India. It is

within this context that it is foreseeable that the Indian Ocean will gain strategic relevance for other member states in the near future.

BOX 3 - Main trends and challenges in the Indian Ocean

- > It is a geostrategic area, as it hosts major sea routes connecting the Middle East, Africa and East Asia with Europe and the Americas;
- > The Indian Ocean holds 16.8% of the world's proven oil reserves and 27.9% of proven natural gas reserves;¹³
- > Projections suggest that the Indian Ocean economy will likely account for over 20% of global GDP by 2025 and its GDP per capita is expected to almost double to USD 6,150;¹⁴
- > It is crucial to improve port quality and logistics, lowering barriers to trade and investment and strengthening regional economic governance;
- > This region faces many traditional and non-traditional safety and security challenges including piracy, armed robberies at sea, terrorism, human trafficking, irregular movement of persons, drugs trafficking, illicit trafficking in wildlife, trafficking of weapons;
- > There is an increasing need to ensure freedom of navigation and uphold the respect of the Law of the Seas: a clear link between the stability and security engagement in the region and the

¹² Giovanni Faleg, "Conflict Prevention in Mozambique: can there be peace after the storm?", *EUISS Brief* no. 5, April 10, 2019.

¹³ Ganeshan Wignaraja, Adam Collins and Pabasara Kannangara, "Is the Indian Ocean Economy a New Global Growth Pole?", LKI Working Paper, October 5, 2018, <https://www.lki.lk/publication/is-the-indian-ocean-economy-a-new-global-growth-pole/>.

¹⁴ *Ibid.*

advancing of European interests has emerged over the last few years;

- > The growing presence of China and its hybrid approach, based on military power and economic and political pressures;
- > A geostrategic confluence of the Indian and Pacific Oceans has emerged, which has resulted in a new focus on connectivity and stronger cooperation between India and Japan.

The following sections show where EU member states are 'physically' in sub-Saharan Africa, and where they plan to expand, based on a set of indicators.¹⁵ These are: diplomatic presence (embassies), flight connections, trade and business councils, official development assistance, high-level visits (official bilateral visits by Heads of Government/State, and Ministers), and consular services.

15 The indicators are based on official data and input received from EU member states between January and April 2020. The section focuses on EU member states only, hence not considering EU presence.

a) Diplomatic presence

The two charts show member states' diplomatic presence in the African sub-continent.

EU member states' embassies

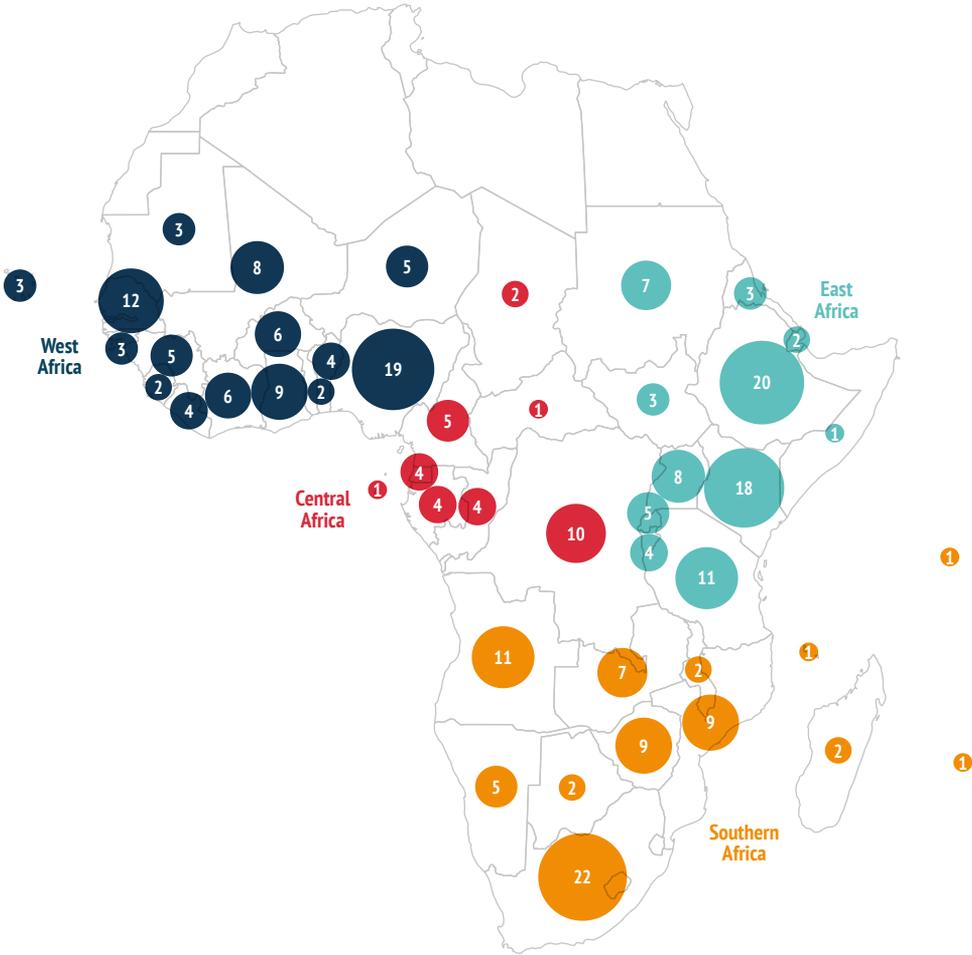
European diplomatic presence in sub-Saharan Africa



Data: Natural Earth, 2020; EU member states, 2020

EU member states' embassies

Number of EU member states' embassies per country in sub-Saharan Africa



Data: Natural Earth, 2020; EU member states, 2020

France and Germany are the only two member states that have embassies in more than 50% of sub-Saharan countries. Many member states have decided to increase their diplomatic presence in sub-Saharan Africa. This is true not only for traditional African players, such as Belgium or Italy which opened respectively 4 and 3 new embassies in Western Africa, but also for many *re-engaging countries*, such as the Czech Republic, Hungary, Poland. Malta, for instance,

opened a High Commission in Ghana, the first Maltese mission in sub-Saharan Africa, in 2019. The top five countries in sub-Saharan Africa hosting the highest number of EU member state embassies are South Africa, Ethiopia, Nigeria, Kenya and Senegal.

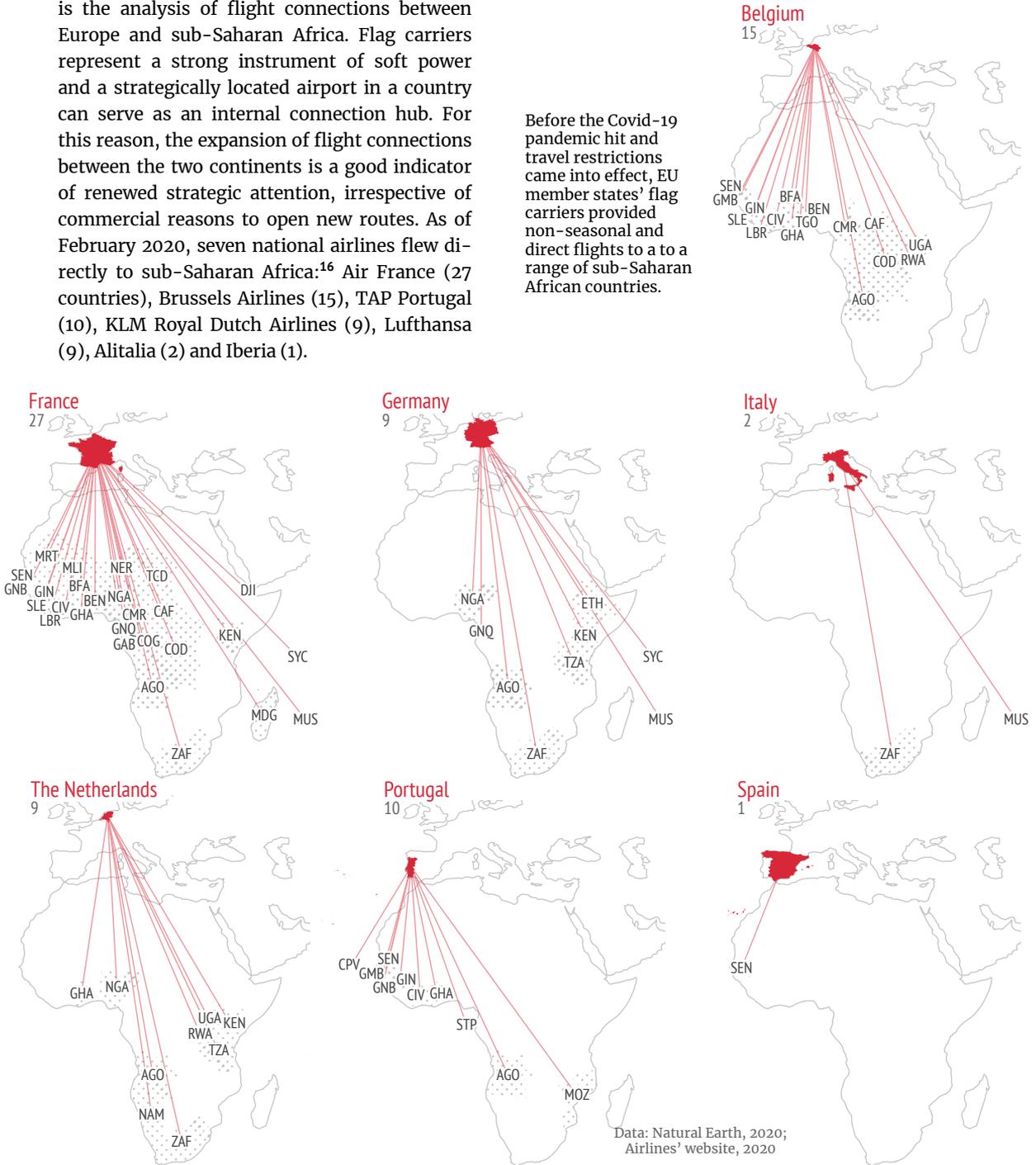
b) Flight connections

Another aspect worth taking into consideration is the analysis of flight connections between Europe and sub-Saharan Africa. Flag carriers represent a strong instrument of soft power and a strategically located airport in a country can serve as an internal connection hub. For this reason, the expansion of flight connections between the two continents is a good indicator of renewed strategic attention, irrespective of commercial reasons to open new routes. As of February 2020, seven national airlines flew directly to sub-Saharan Africa:¹⁶ Air France (27 countries), Brussels Airlines (15), TAP Portugal (10), KLM Royal Dutch Airlines (9), Lufthansa (9), Alitalia (2) and Iberia (1).

Airline destinations

Routes served by EU member state flag carriers in sub-Saharan Africa

Before the Covid-19 pandemic hit and travel restrictions came into effect, EU member states' flag carriers provided non-seasonal and direct flights to a to a range of sub-Saharan African countries.



Data: Natural Earth, 2020; Airlines' website, 2020

¹⁶ Data dates back to the pre-Covid-19 pandemic period and was collected between November 2019 and February 2020. Only non-seasonal and direct flights operated by member states' national airlines have been included.

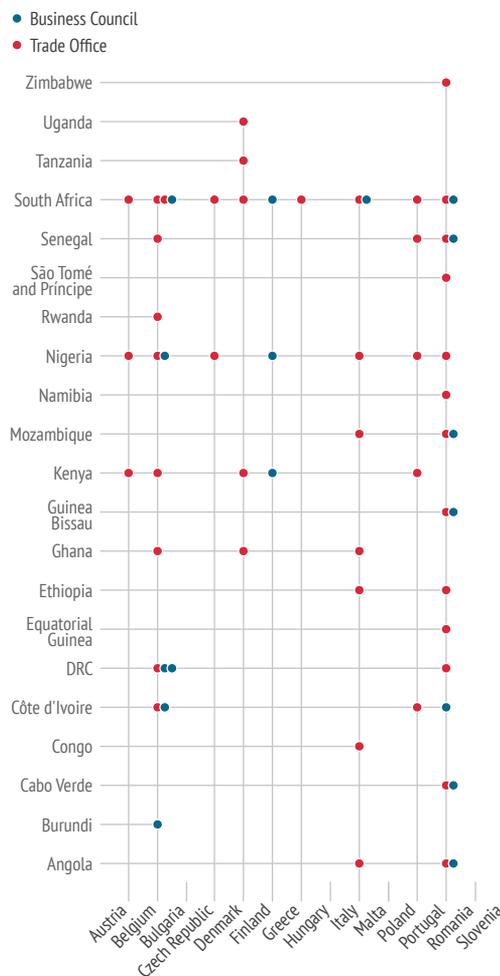
c) Trade and business councils

Member states' engagement in sub-Saharan Africa demonstrates fresh economic impetus, with the aim of promoting a suitable and secure business environment, increasing investment opportunities and boosting trade on the basis of a mutually beneficial commercial partnership and inclusive economic growth.

The network of member states' trade offices and business councils gives an indication of how intense commercial ties are. South Africa and Nigeria are the most important commercial hubs, and Ghana is gaining greater attention. In East Africa, Kenya hosts several business and trade councils.

EU member states' business councils and trade offices

In sub-Saharan Africa



Data: EU member states, 2020

NB: The diagram only lists member states who agreed to publish data.

d) Official Development Assistance (ODA)

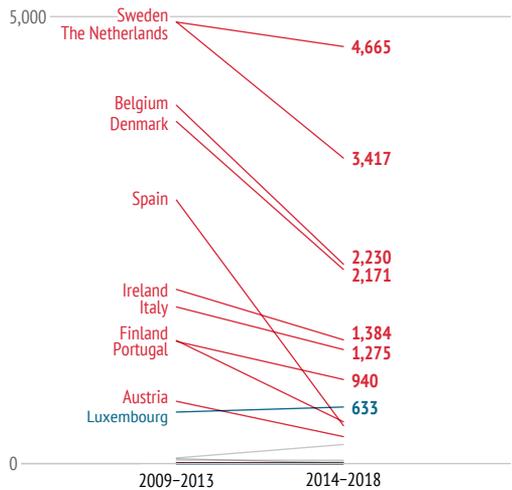
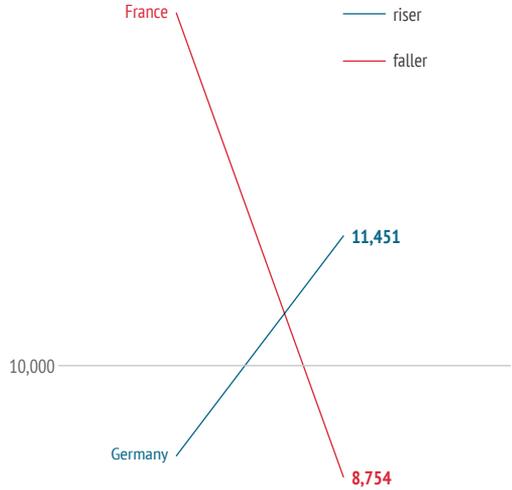
Even though EU member states share the strategic intent to move from donor-recipient relations towards a more comprehensive partnership, development assistance remains a key factor in assessing EU member states' engagement in sub-Saharan Africa. In 2018, the top five EU member states engaged in ODA were Germany, France, Sweden, the Netherlands and Belgium.¹⁷

However, it is interesting to note that, with the exception of Germany and Luxembourg, all the top donors and the majority of other member states scaled down their aid disbursements to sub-Saharan African countries between 2009 and 2019.

The top-three sub-Saharan African recipients of net ODA from EU member states in 2018 are: Ethiopia (\$510), Cameroon (\$468) and the Democratic Republic of Congo (\$436).¹⁸

Rise and fall

Evolution of EU member state net ODA disbursements to sub-Saharan Africa, 5-year aggregates, current \$ million



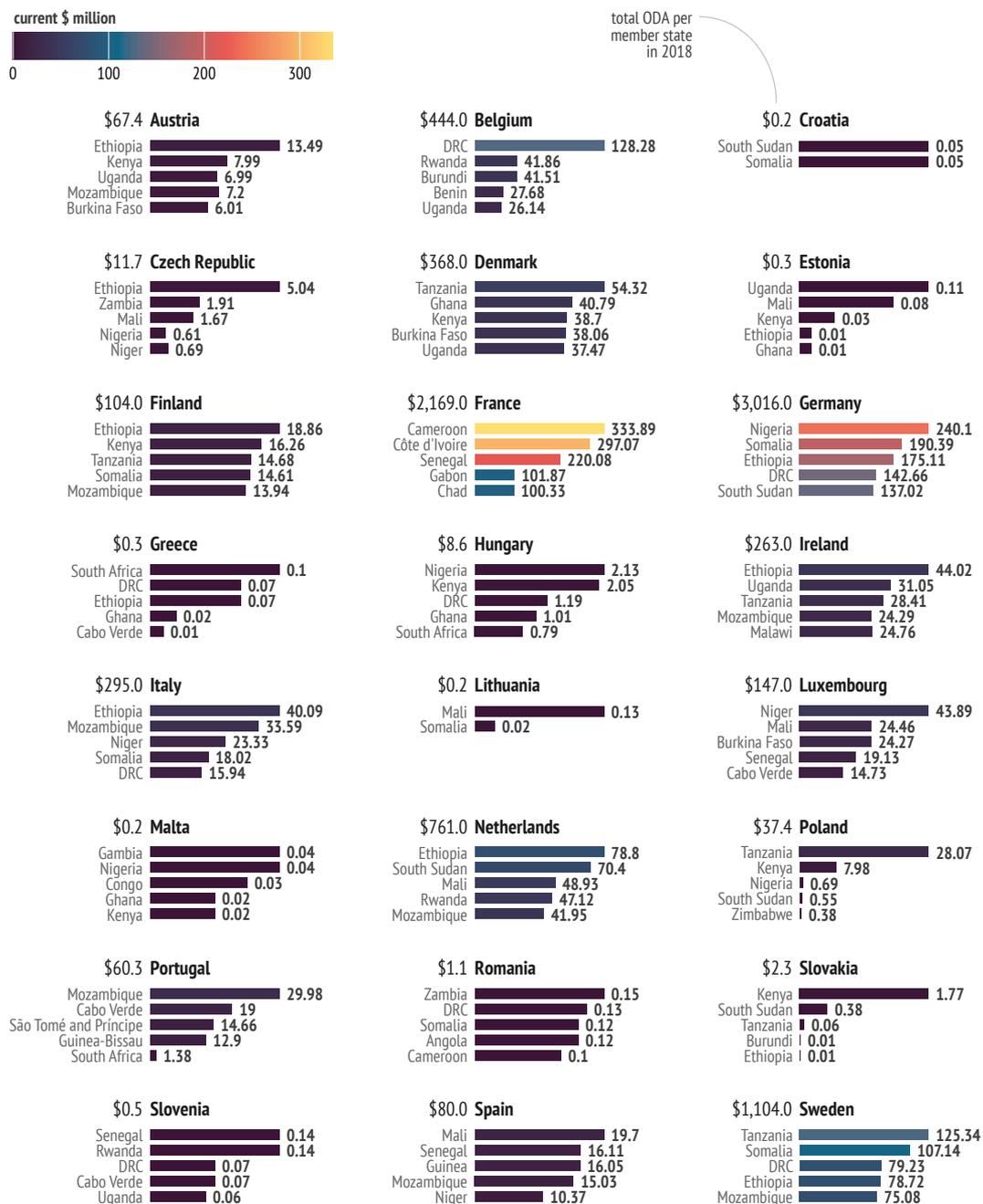
Data: OECD, 2020

¹⁷ Data refers to net ODA in current US dollars. Source: OECD, 2020.

¹⁸ Net ODA disbursements are expressed in current USD million. Source: OECD, 2020.

Development assistance

EU member states' net disbursements in ODA towards sub-Saharan Africa, top-5 recipients, current \$ million, 2018

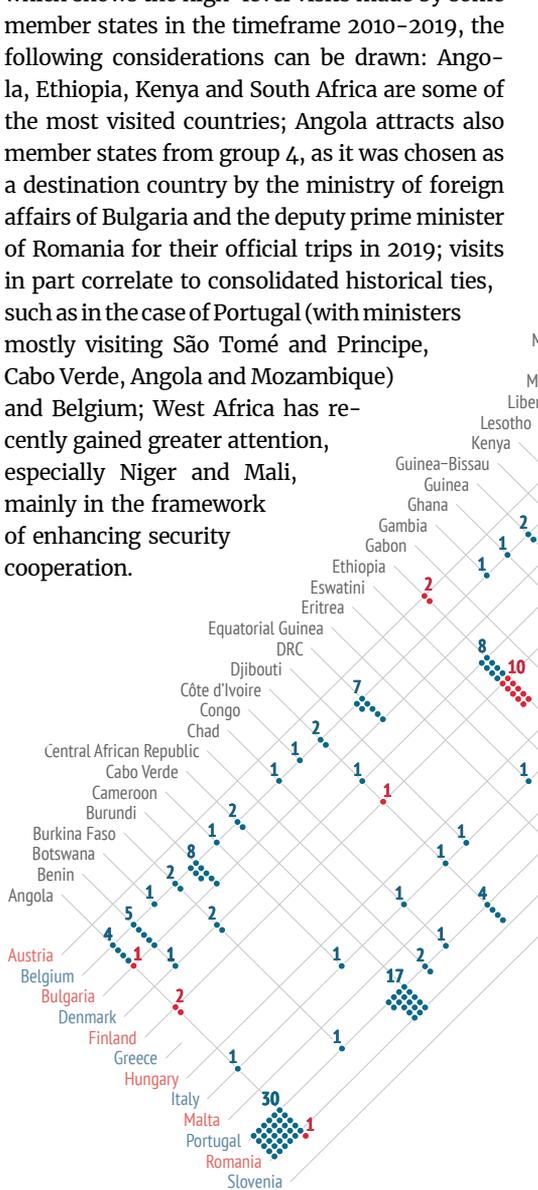


Data: OECD, 2020

NB: Only those member states that disbursed ODA to sub-Saharan African countries in 2018 are listed.

e) High-level visits

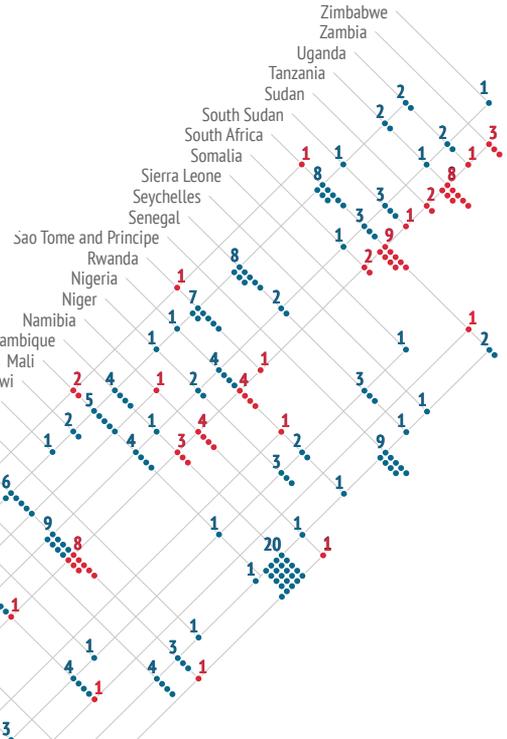
The number and the geographic distribution of high-level visits from member states to sub-Saharan Africa is a good indicator of which countries attract most attention and where member states are most interested in strengthening diplomatic and economic relations or finding new contacts. Looking at the diagram below, which shows the high-level visits made by some member states in the timeframe 2010–2019, the following considerations can be drawn: Angola, Ethiopia, Kenya and South Africa are some of the most visited countries; Angola attracts also member states from group 4, as it was chosen as a destination country by the ministry of foreign affairs of Bulgaria and the deputy prime minister of Romania for their official trips in 2019; visits in part correlate to consolidated historical ties, such as in the case of Portugal (with ministers mostly visiting São Tomé and Príncipe, Cabo Verde, Angola and Mozambique) and Belgium; West Africa has recently gained greater attention, especially Niger and Mali, mainly in the framework of enhancing security cooperation.



High-level visits

From EU member states
to sub-Saharan African countries,
2010-2019

Data: EU member states, 2020;
NB: The diagram only lists member states who agreed to publish data. Only visits made by Heads of State and Government, Ministers and, for those countries that are officially considered as federal states according to their Constitution, the Heads of local governments have been mapped

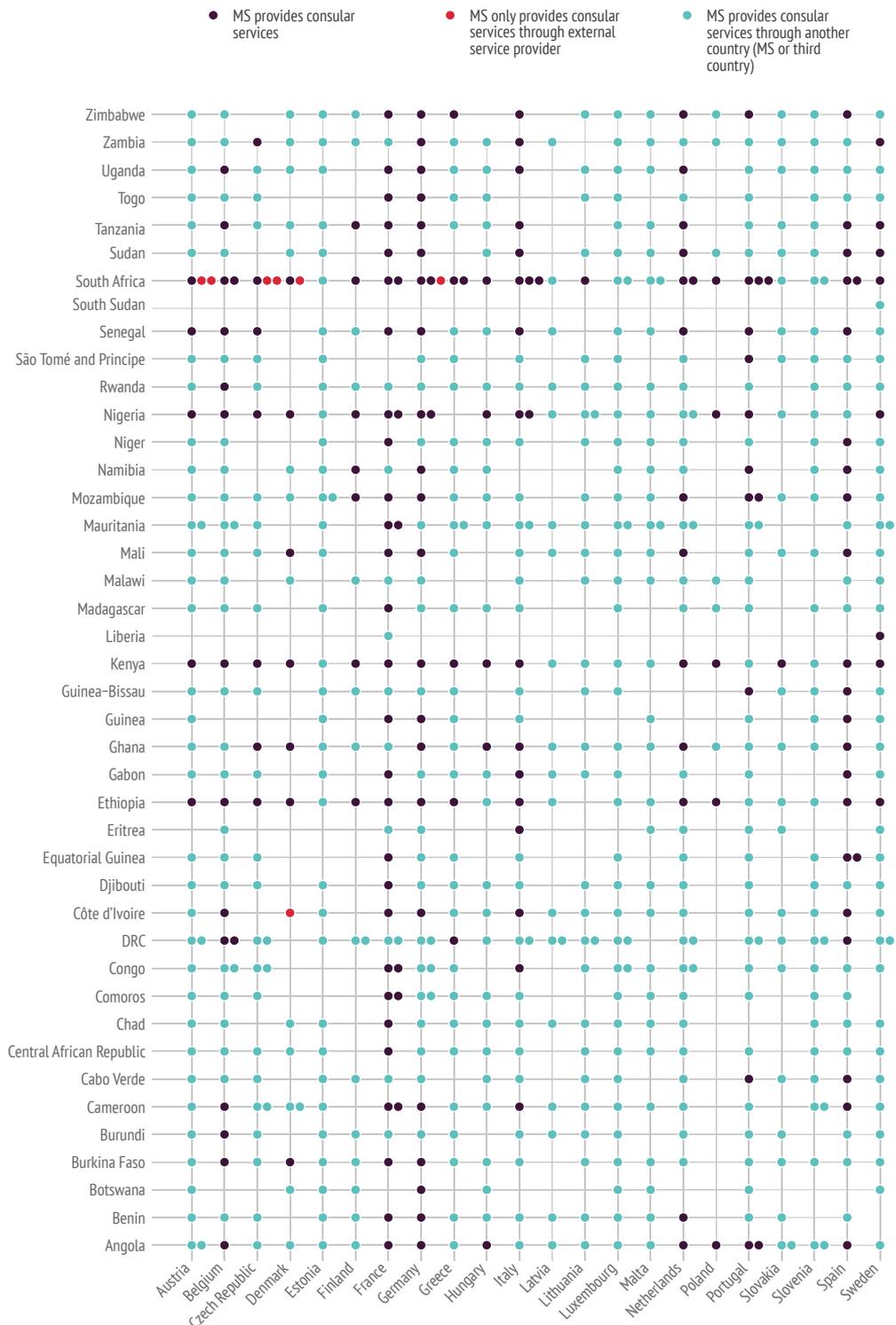


f) Consular services

Consular services of member states belonging to the Schengen Area give an indication of member states' diplomatic and political networks in sub-Saharan countries. As illustrated by the diagram opposite, France is the country with the highest number of consular services, followed by Spain and Germany. From a sub-Saharan Africa perspective, Angola, Ghana, Kenya and South Africa are the only countries which host at least one consular service per each EU Schengen member state.

Consular services

Number of EU member states' consular services in sub-Saharan African countries



Data: European External Action Service, 2019;
 NB: The diagram includes only EU member states who participate in the Schengen Area.

CHAPTER 3

EU MEMBER STATES' POWER

This chapter analyses how member states project influence in sub-Saharan Africa by mapping, and measuring European hard and soft power. Hard power is the capacity of an actor to project influence and achieve the attainment of a strategic objective through coercion, using military, economic or political means. Soft power, in contrast, is the capacity of an actor to attain strategic objectives not by coercion or force, but by shaping preference and behaviours thanks to the attractive potential of instruments such as culture, education, values, trade or aid. As this chapter will show, understanding how member states use hard and soft power instruments to pursue strategic objectives helps better define their strategic behaviour.

HARD POWER

Military deployments are key indicators of a country's hard power in sub-Saharan Africa. Member states deploy troops in two ways: as part of multilateral operations, and as bilateral deployments.

With regard to multilateral operations, member states have contributed extensively to UN peacekeeping missions and EU-led military operations and civilian missions over the last few years. Their multilateral engagement towards sub-Saharan Africa has increased, as demonstrated by the fact that the share of sub-Saharan missions in the demand for

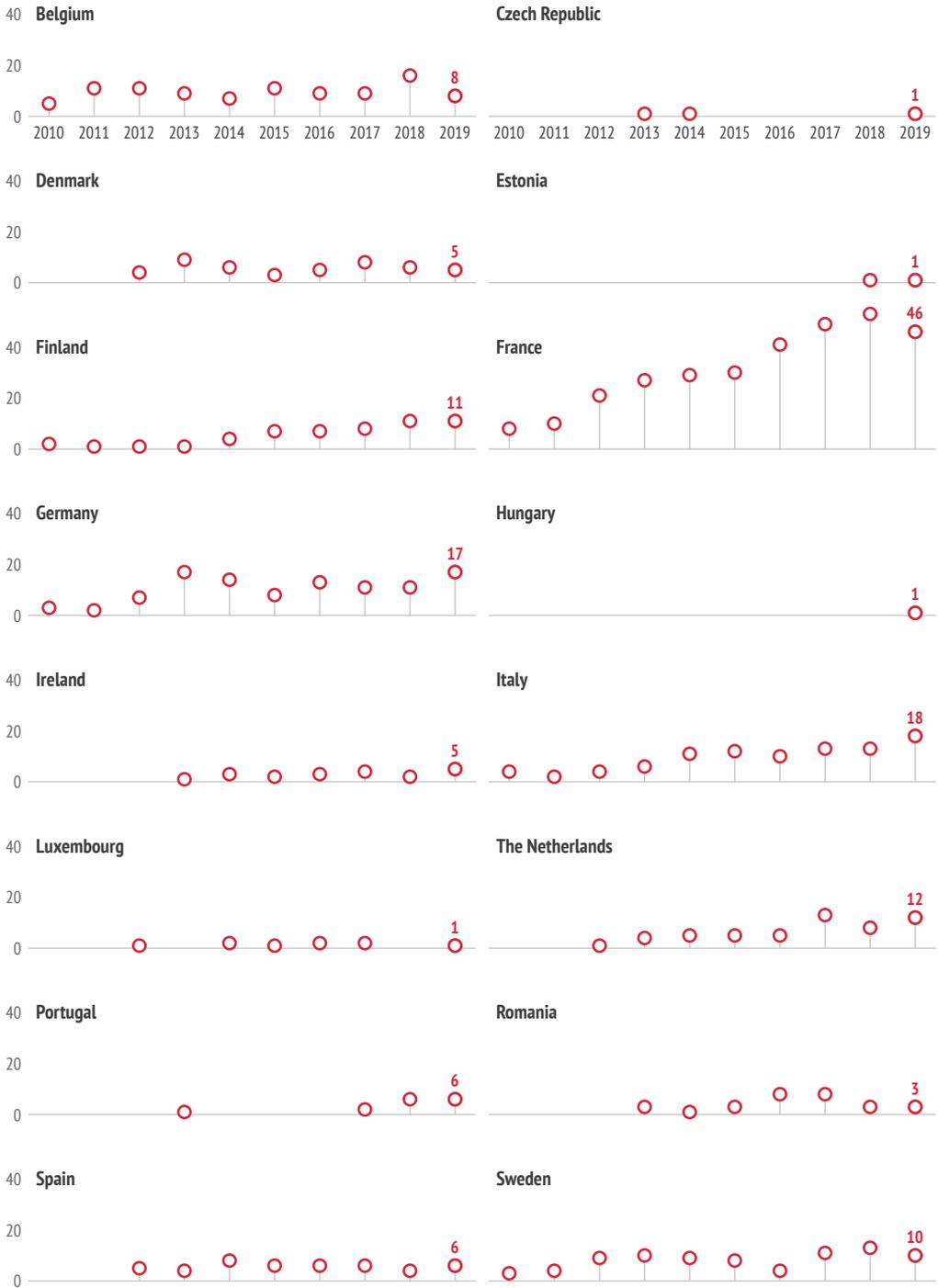
personnel for EU civilian Common Security and Defence Policy (CSDP) missions rose from 2% to 28% between 2009 and 2019.¹ Because there are many reasons, including political ones, explaining a state's decision to contribute to multilateral operations, these deployments are not *per se* good indicators of a country's will or capacity to project hard power.

Conversely, bilateral engagements usually require heavier investment, efforts and commitments. While some years ago only a few member states were deploying troops in sub-Saharan Africa outside UN or EU operations, this number has recently increased, especially in the Sahel, as shown in the diagram opposite. Member states concentrate their security concerns mainly in two areas: the Sahel and the Horn of Africa. Due to the deterioration of maritime security, the Gulf of Guinea is also gaining greater attention, especially from France which is committed to ensure maritime security with Operation *Corymbe* relying on the military installations in Côte d'Ivoire (900 personnel) and Gabon (350 personnel), and by Portugal and Spain through maritime defence cooperation. Although multipolar competition may trigger stronger military commitment by other states in the Indian Ocean, for now this region is not seeing an increase in engagements, with the exception of France, which is present in the area through its military defence bases in French overseas territories La Réunion and Mayotte.

¹ Timo Smit, "Towards a More Capable European Union Civilian CSDP", *SIPRI Policy Brief*, November 2019, https://www.sipri.org/sites/default/files/2019-11/pb_1911_towards_a_more_capable_eu_civilian_csdp.pdf.

EU civilian CSDP missions

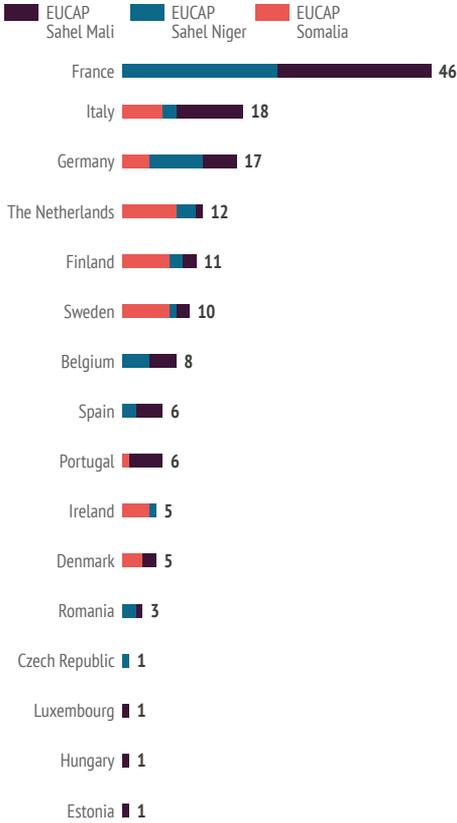
In sub-Saharan Africa, EU member states' personnel contributions, 2010–2019



Data: SIPRI, 2020;
 NB: EUSEC RD Congo is excluded due to the lack of complete data;
 EUCAP Nestor and EUCAP Somalia are considered the same mission;
 EU SSR Guinea Bissau is excluded, as it was no longer active in December 2010;
 Contribution refers only to seconded personnel, contracted personnel are excluded.
 The graph lists all EU member states who contribute to civilian CSDP missions.

EU civilian CSDP missions

In sub-Saharan Africa, EU member states' personnel contributions per mission, 2019



Data: Stockholm International Peace Research Institute (SIPRI), 2020; NB: Contribution refers only to seconded personnel, contracted personnel are excluded. The graph lists all EU member states who contribute to civilian CSDP missions.

In the Sahel, even though France remains the main security stakeholder, other member states today play a bigger role in the field of defence and security. Italy's parliament approved in January 2018 the Bilateral Mission of Support to the Republic of Niger (MISIN) and Spain continues to support France within the Operation *Barkhane* through two military detachments in Senegal (*Destacamento Marfil*) and in Gabon (*Destacamento Mamba*) which carry out the

EU military CSDP operations

In sub-Saharan Africa, EU member states' personnel contributions per operation, as of February 2019

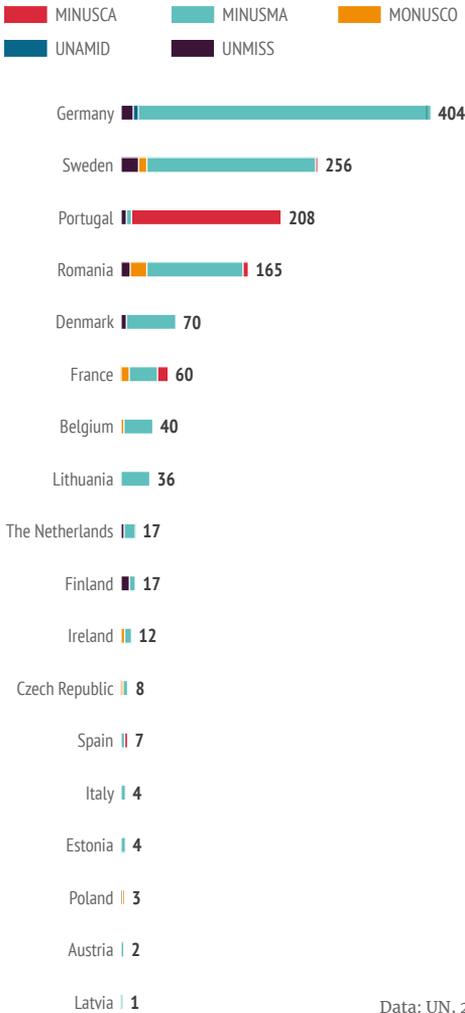


Data: International Institute for Strategic Studies (IISS), 2019; NB: Contribution refers only to seconded personnel, contracted personnel are excluded. EU NAVFOR Atalanta is excluded due to the lack of complete data. The graph lists all EU member states who contribute to military CSDP operations.

mission of strategic airlift in support of the efforts of French troops. Nonetheless, it is worth underscoring that this greater engagement stems not only from member states belonging to group 1, but is a common priority shared by many other states that give a central role to the stabilisation of the Sahel in their national strategies.

UN peacekeeping operations

In sub-Saharan Africa, EU member states' personnel contributions per operation, 2019



Data: UN, 2020;
 NB: The graph lists all EU member states who contribute to UN peacekeeping operations. Contribution refers to contingent troops, staff officers, experts and police. UN peacekeeping operations listed here are only those led by the UN Department of Peace Operations.

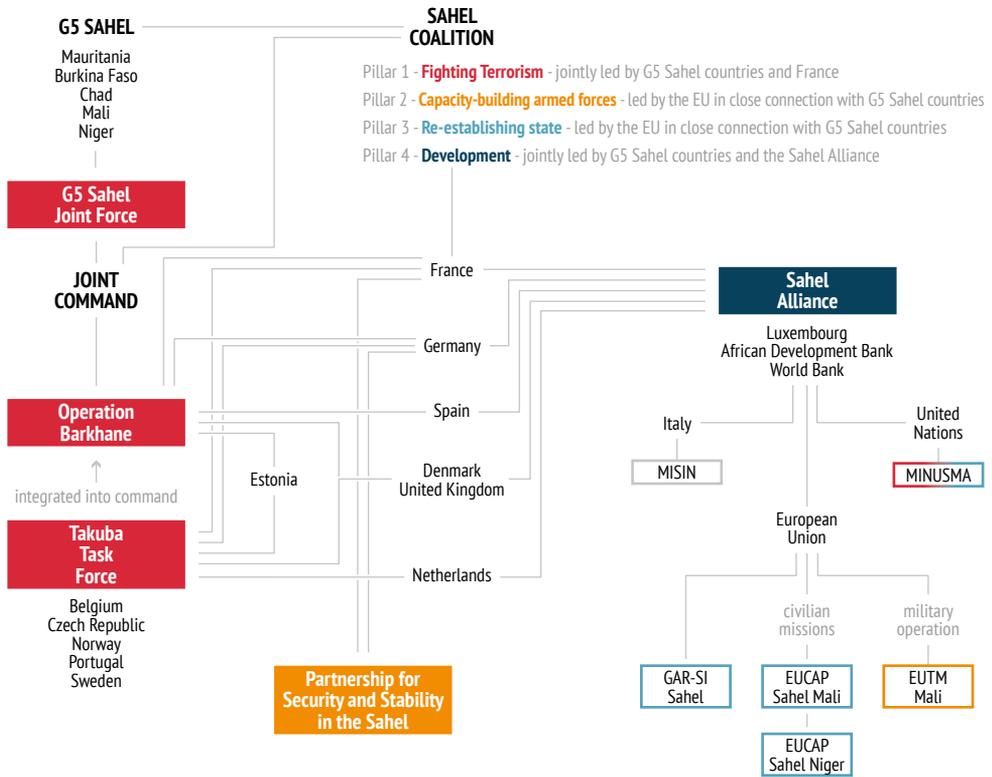
As confirmation of this strategic greater cross-cutting engagement, the newly-established Takuba Task Force, which will be mainly composed of European Special Operation Forces and operate in the Liptako region under *Barkhane*'s command, is supported by several EU countries: Belgium, Denmark, Germany, the Czech Republic, Estonia, the Netherlands, Portugal, Sweden, as well as two non-EU countries, namely Norway and the United Kingdom. Denmark² and Estonia³ also participate in Operation *Barkhane*. This is not considered by member states as a shift from their traditional multilateral engagement, but rather as a parallel and mutually reinforcing process to enhance security in the Sahel. Another element to be highlighted is the importance of the security-development link which is a key issue on which all member states' strategies converge. This link has been also confirmed by the Summit in Pau which has included 'development' as the fourth pillar of the Sahel Coalition and has envisaged a greater collaboration with the Sahel Alliance.

2 In October 2019, Denmark's parliament approved the deployment of two EH-101 transport helicopters including up to 70 persons as well as 1-2 staff officers to support the international effort to counter terrorism in the Sahel region. The Danish helicopter contribution is placed in Gao in the eastern part of Mali where it will carry out transportation tasks, including transport of troops and equipment. It is the first time that Denmark contributes to Operation *Barkhane* and the deployment is planned to end in December 2020.

3 In November 2019, Estonia's parliament approved a plan to almost double the country's troop deployment to Operation *Barkhane* (from 50 to 95). Estonia has participated in this counter-terrorism operation since 2018 operating in Mali

Alliances and coalitions

The architecture of foreign assistance in the G5 Sahel and the role of European states



The Horn of Africa is another key region in terms of hard power projection. Unlike West Africa, where member states’ approaches are strictly security-driven, hard power in the Horn of Africa responds to the wide range of interconnected issues described above, among them the economic relevance of the area and the growing military presence of global powers. Another difference with the Sahel is that, leaving aside member states’ engagement in

multilateral missions, bilateral military engagement remains the prerogative of traditional security providers, mainly France⁴ and Italy,⁵ which both have a permanent military base in Djibouti. Italy is also currently conducting the Bilateral Training Mission for Police Forces in Djibouti and Somalia (MIADIT). Germany and Spain maintain military personnel in the French facilities in Djibouti within the framework of EU-led Operation *Atalanta*.⁶

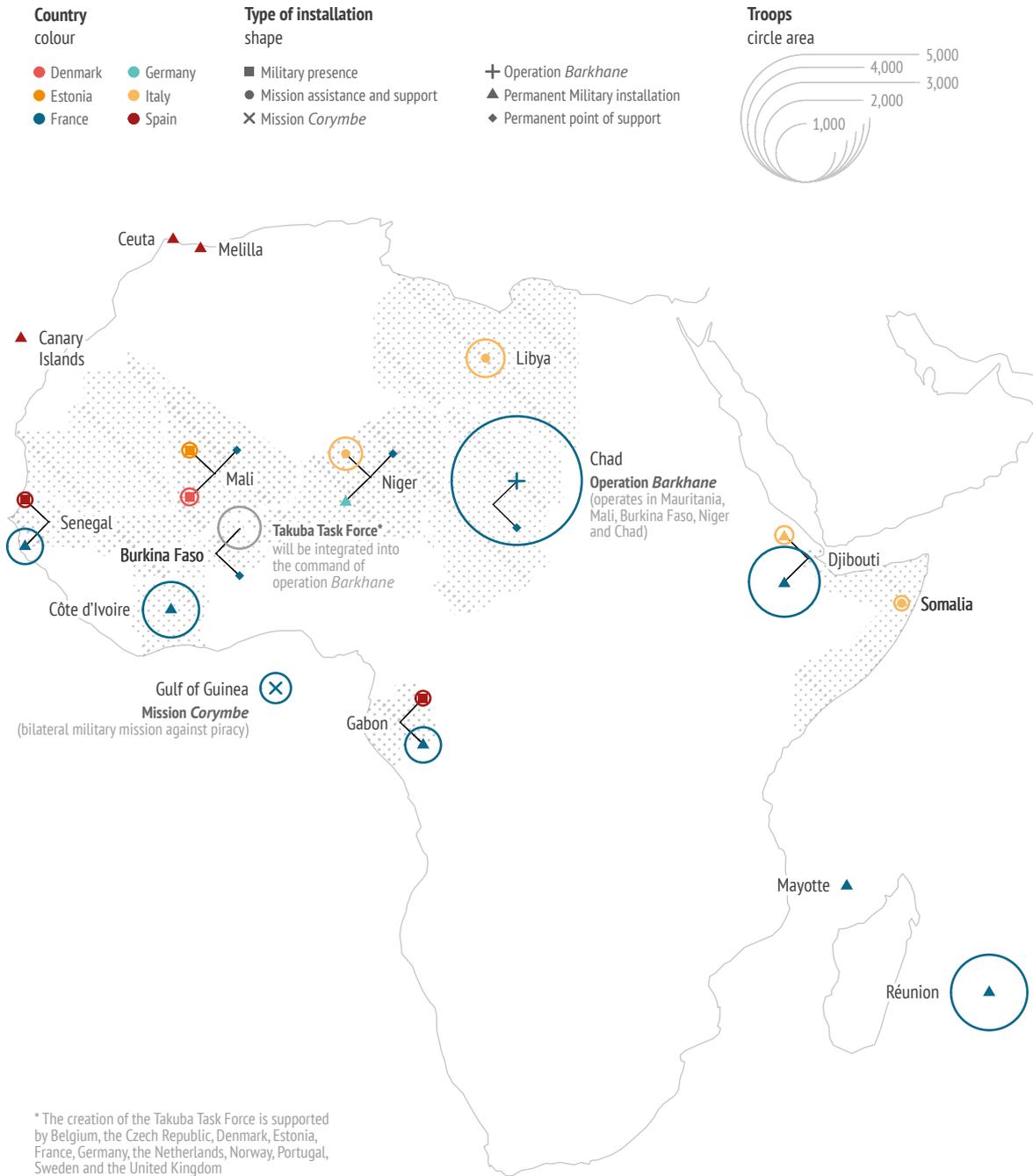
4 France’s forces are deployed at several sites in Djibouti city, including Djibouti–Ambouli International Airport, a naval base, and Chabelley Airport outside the capital. Since independence the number of French troops in Djibouti has declined from 4,300 in 1978, to 2,400 in the 2000s, to the current level of 1,450 — the minimum stipulated in the 2011 treaty.

5 Italy’s National Support Military Base (Base Militare Nazionale di Supporto) opened in 2013. The base is intended primarily to support Italian naval activity in the region, most notably Operation *Atalanta*, and the operation of UAVs. The base is reportedly capable of hosting up to 300 troops but operates with on average of 80 personnel.

6 Neil Melvin, “The Foreign Military Presence in the Horn Of Africa Region”, Stockholm International Peace Research Institute (SIPRI), Background Paper, April 2019.

Military presence

EU member states' military installations and deployments



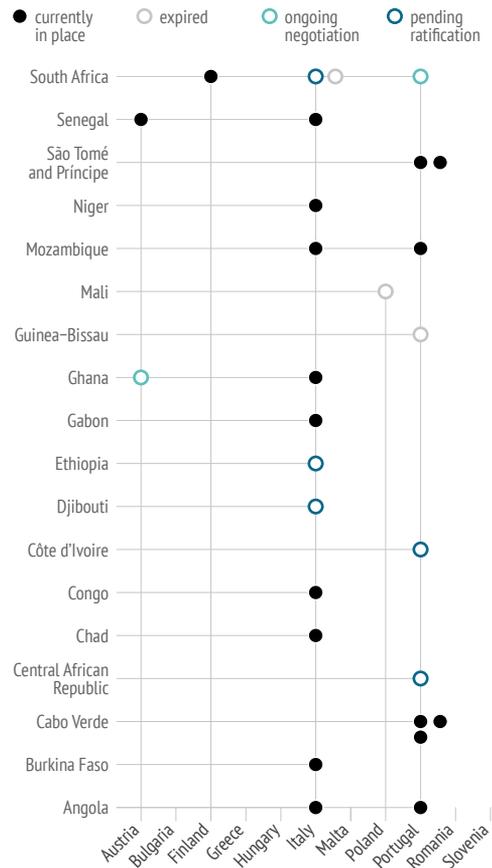
* The creation of the Takuba Task Force is supported by Belgium, the Czech Republic, Denmark, Estonia, France, Germany, the Netherlands, Norway, Portugal, Sweden and the United Kingdom

In addition to military deployments, defence cooperation is another indicator of hard power. Data gathered shows that Portugal is actively engaged in defence cooperation in the field of maritime security in West Africa (Cote d'Ivoire, Cabo Verde and São Tomé and Príncipe). Portugal also has defence cooperation agreements with its former colonies Angola and Mozambique. Italy can boast a well expanded network of defence cooperation agreements, including the Horn of Africa (with Ethiopia and Djibouti), West Africa (Senegal, Niger, Ghana, Gabon, Chad and Burkina Faso) and Southern Africa (Angola, Mozambique and South Africa). Finally, it is interesting to note the defence cooperation agreements between Poland and Mali (expired in 2019) and between Austria and Ghana and Austria and Senegal.

Bilateral defence cooperation agreements

Between EU member states and sub-Saharan African countries, as of March 2020

A Defence Cooperation Agreement is a bilateral agreement which establishes a legal framework between two countries to promote cooperation in such fundamental areas as defence policy coordination, research and development, joint military exercises, education and training, officer exchanges, arms procurement, and exchange of classified information



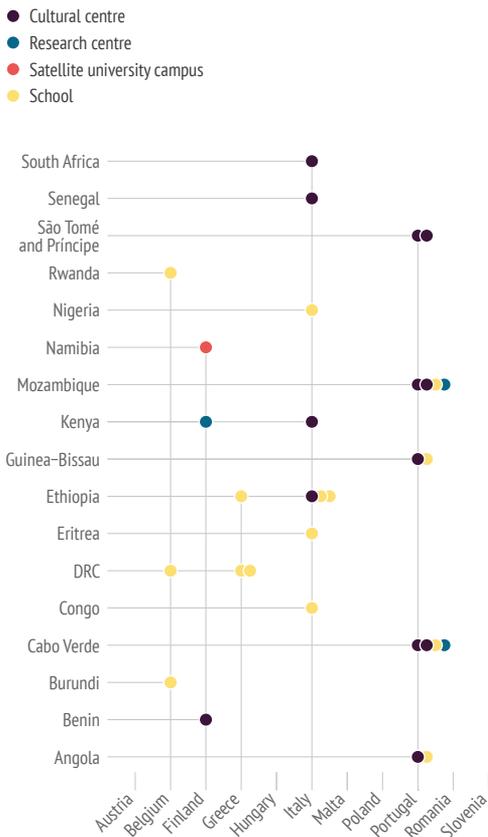
Data: EU member states, 2020; NB: The diagram only lists member states who agreed to publish data.

SOFT POWER

When looking at EU member states' soft power in sub-Saharan Africa, some salient trends may be observed. Above all the economic dimension stands out, as demonstrated by the importance of trade and investment in member states' strategic documents, the main focus of high-level initiatives and visits, as well as the extensive network of member states' trade offices and business councils, described in the previous chapters. Development cooperation also occupies an important role in the soft-power toolbox.

The cultural footprint

EU member states' schools, cultural and research centres in sub-Saharan Africa



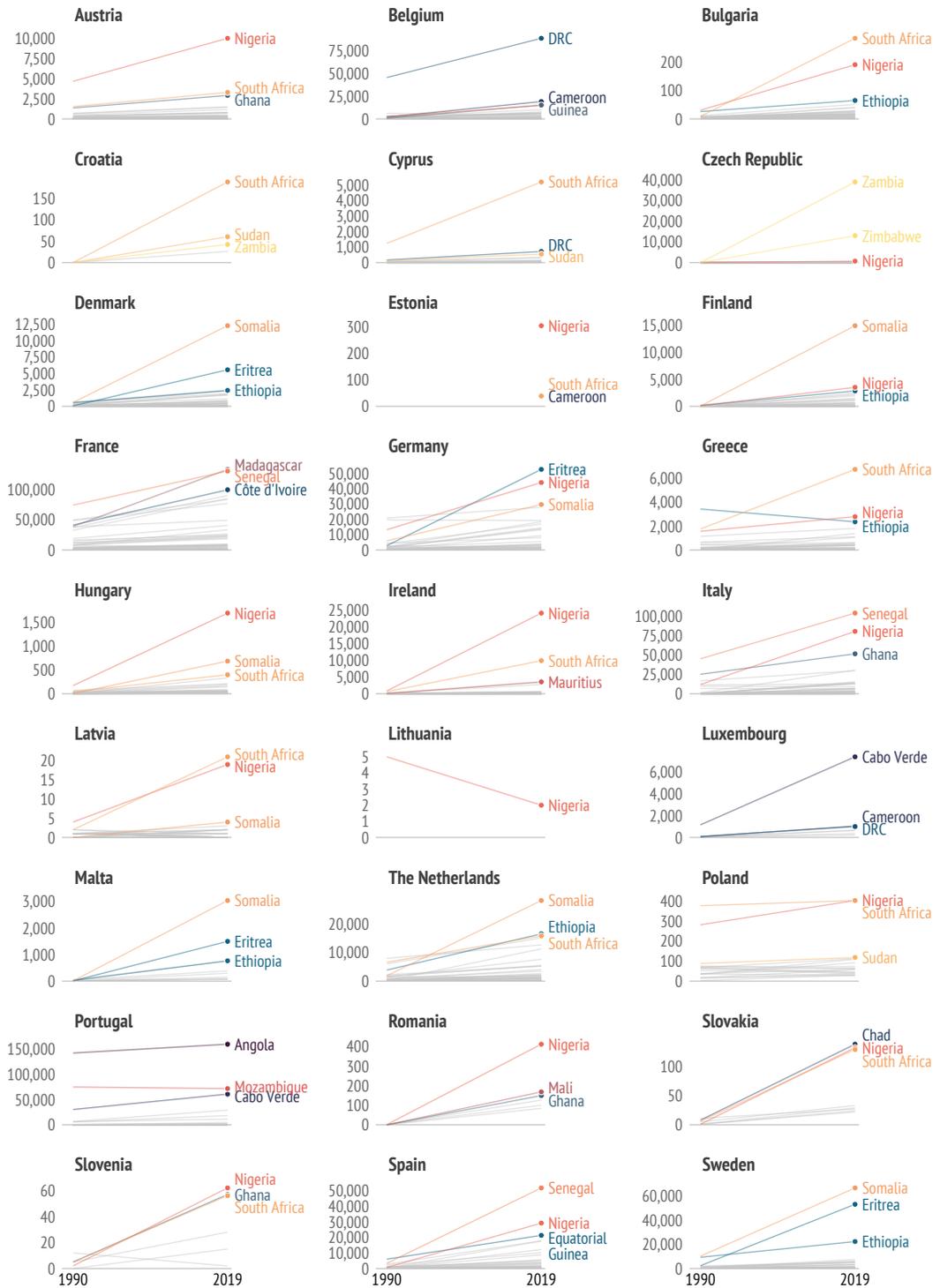
Data: EU member states, 2020; NB: The diagram only lists member states who agreed to publish data.

In addition to economic instruments, the distribution of member states' cultural and research centres, university campuses and schools can measure their capability to project their soft power to the sub-continent. The presence of cultural centres is mainly correlated to deep-rooted historical and linguistic ties: Portugal is well represented in Cabo Verde, Mozambique, Angola and Guinea-Bissau; Belgium in Central Africa; Italy in Ethiopia and Eritrea, as well as South Africa, Kenya and Nigeria. Greece has schools in Ethiopia and in the Democratic Republic of Congo.

A second element to consider is the African diaspora in EU member states. The evolution of the number of migrants living in EU member states provides a good indicator. In absolute terms, France, Italy, Portugal and Germany are the four member states with the largest number of migrants from sub-Saharan countries, as of 2019. It is interesting to note that in the timeframe 1990-2019, almost all member states experienced an increase in the number of Africans living in their countries, especially from Nigeria, South Africa, Somalia and Eritrea. Nordic countries and Malta saw an increase especially in the stock of migrants coming from Somalia and Eritrea. Portugal continued to be seen as a destination country especially by migrants from Portuguese-speaking countries. The Czech Republic witnessed an increase in migrants from Zambia and Zimbabwe while Hungary experienced an increase in the number of migrants from Nigeria, confirming a consolidated trend of migration flows from African countries to Hungary, which dates back to the Cold War.

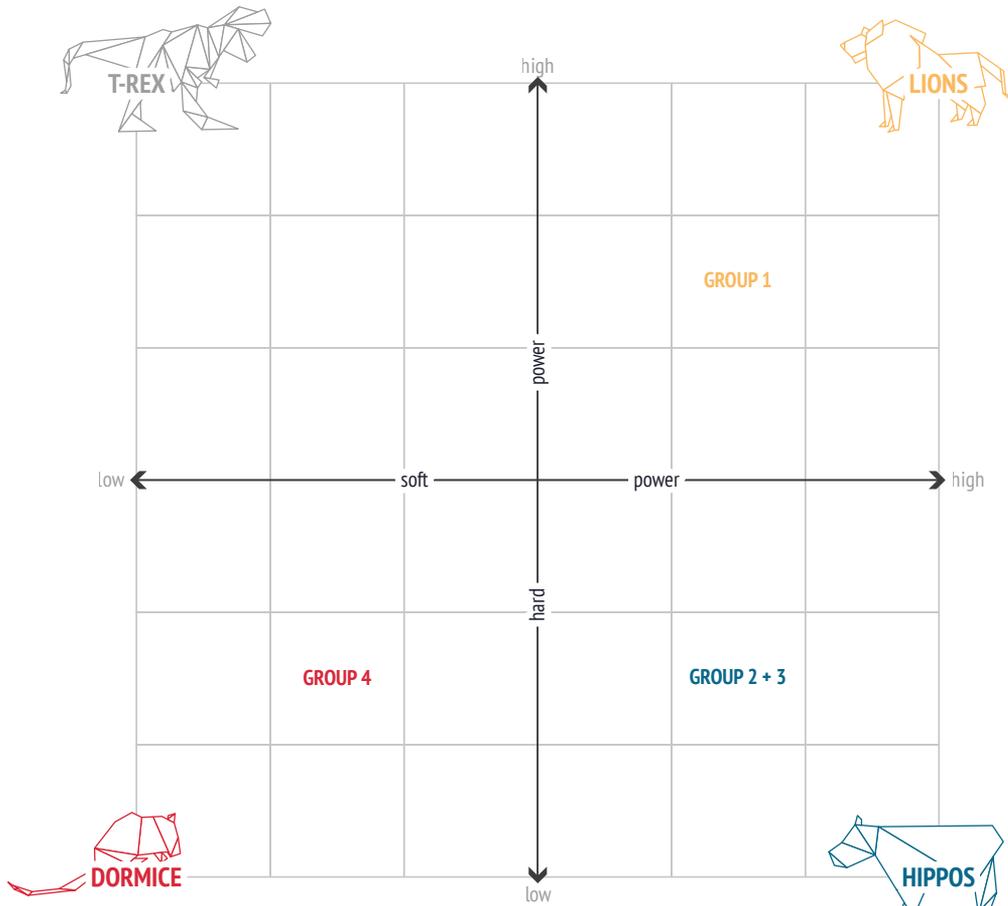
Change in migrant numbers

From sub-Saharan Africa in EU member states, 1990 vs 2019



European power matrix

EU member states' use of hard and soft power in sub-Saharan Africa



WHICH 'LANGUAGE OF POWER' DOES THE EU (AND ITS MEMBER STATES) SPEAK?

The extent to which member states use hard and soft power instruments to advance their national interest in sub-Saharan Africa defines

the 'language of power'⁷ they speak in the continent, and helps understand whether those different languages can contribute to the EU's strategic autonomy.

The 'EU power matrix' below provides four categories of behaviour, depending on the ratio between soft and hard power capabilities underpinning member states' engagements with sub-Saharan Africa. States who use no or little soft power, and only act through hard power can be dubbed 'T-Rex' as they no longer exist

7 Josep Borrell, 'Embracing Europe's Power', *Project Syndicate*, February 8, 2020, <https://www.project-syndicate.org/commentary/embracing-europe-s-power-by-josep-borrell-2020-02>.

today – they became extinct as a result of the decolonisation process.

States using limited hard and soft power are those who do not project any influence, or only do so very marginally, hence they can be defined as ‘dormice’. This does not mean that those states do not have the capacity to increase their outreach: they just do not (currently) have a strategic interest in doing so. This category overlaps with the fourth group of strategic profiles.

A few member states can, in contrast, afford to maintain high levels of hard and soft power engagements. Here we have depicted them as lions. They necessarily belong to the first group of strategic profiles, as such commitment can only be sustained if sub-Saharan Africa is considered a top strategic priority. In particular,

two member states – France and Germany – can mobilise and deploy a wider array of foreign policy instruments, to achieve strategic objectives in the sub-continent.

Most EU member states would actually belong to the fourth category, depicted in the matrix as hippos. They have limited hard power means to coerce, yet this is compensated by high levels of soft power. States engaging with Africa as donors, such as the Nordic EU countries, or those focusing on commercial relations, such as the Netherlands, typically supported by diplomatic and political presence and cultural/educational activities, fall into this category and overlap with the second and third groups of strategic profiles, depending on the quantity and quality of their engagements.

CHAPTER 4

THE UK STRATEGY POST-BREXIT

There could not be a discussion on European strategies for sub-Saharan Africa without taking into account the role of another ‘lion’ in power terms: the United Kingdom. Brexit, in fact, has major strategic implications for the EU’s engagement in Africa, as the UK definitely belonged to the first group in EU member states’ strategic profiles. What then are the strategic consequences of Brexit for the UK and Europe’s relations with sub-Saharan Africa?

On 22 February 2019, the British minister of state for Africa, Harriet Baldwin, and the Chairperson of the African Union Commission, Moussa Faki Mahamat, signed a Memorandum of Understanding concerning a partnership between the AU and the UK. This strategic partnership aims at strengthening the engagement between the continent and the UK government, mobilising investments for Africa’s sustainable transformation, including the promotion of UK-Africa trade and investment, the AfCTFA and initiatives to harness the demographic dividend. Within this framework, the UK announced a funding package of £30 million for prosperity and security projects across Africa. More recently, on 20 January 2020, the UK prime minister Boris Johnson hosted the UK-Africa Investment Summit which aims to lay ‘the foundations for new partnerships between the UK and African nations based on

trade, investment, shared values and mutual interest.’¹ In the lead-up to this Summit, £6.5 billion of commercial deals have already been signed by British companies to deliver jobs, growth and investment across the UK and Africa.

The new UK approach towards Africa is based on a deeper engagement in both economic and security terms and on more new partnerships with third partners.² By 2022, the UK wants to be the G7’s first investor in Africa, “with Britain’s private sector companies taking the lead in investing the billions that will see African economies growing by trillions.”³ The government has identified 5 priorities:

1. unlocking inclusive economic growth in Africa;
2. long-term security and stability;
3. climate change and sustainable natural resource management;
4. investing in people: education, health and jobs;
5. greater UK engagement and presence in the Sahel.

With regard to the economic dimension, the key issue for London is to renegotiate trade agreements in order to maintain the current trade flows. Another key aspect of the UK approach is

1 UK-Africa Investment Summit, “UK Government Statement”, London, January 20, 2020, https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/859314/2020_01_20_AIS_-_UK_Government_Statement_-_Final_Version.pdf

2 UK Government, “PM Theresa May’s speech”, Cape Town, August 28, 2018, <https://www.gov.uk/government/speeches/pms-speech-in-cape-town-28-august-2018>.

3 Ibid.

the provision of niche skills and services, such as the financial sector, namely through ‘skill sharing programmes’ and ‘innovation partnerships’ to deepen business ties between the African continent and the UK.

The UK also aims to play a key role in the long term as security provider, with a special focus on the Horn of Africa, where it has traditionally engaged, and a growing interest in the Sahel, as demonstrated by the decision to send 250 troops to the United Nations Multidimensional Integrated Stabilisation Mission in Mali (MINUSMA). The Sahel as a priority region was also clearly stressed by then prime minister Theresa May in the speech she delivered in Cape Town in 2018: “we will invest more in countries like Mali, Chad and Niger that are waging a battle against terrorism in the Sahel – including by opening new embassies in Niger and Chad and having a much larger presence in Mali.”⁴ Another region where the British have strategic interests is the Indo-Pacific. The UK aims to increase its engagement on security and defence in the region, and India may be a key partner in this project, in order to counterbalance the growing presence of China, as suggested by the British Parliament.⁵ The UK security engagement in these three areas (Horn, Sahel and Indo-Pacific) also begs the question of whether the defence partnership with France, established in the Lancaster House Treaty, will be strengthened or weakened. Both the UK and France are inclined to solidify bilateral defence cooperation, which can bring mutual benefits in terms of strategic intelligence.⁶ However, complex Brexit negotiations and political confrontation may complicate the relationship, and London may actually turn to other strategic

partners with whom it can share more similar strategic priorities and values, such as India or the US.

Based on the considerations above, will Brexit truly be a game changer for Europe’s relations with sub-Saharan Africa? In terms of thematic priorities and normative values, there is a lot of overlap between UK, EU member states’ and EU common strategic objectives, as the next chapter will also show. These actors look at sub-Saharan Africa through very similar, and in some cases identical lenses, as shown by the language used in official documents, which may facilitate future cooperation patterns. Having said that, it is probably more likely that Brexit will not be a game changer for the EU and its member states, but rather for the UK itself, for several reasons. First, despite its economic ambitions, the UK may struggle to be perceived in Africa as a priority trading

It is probably more likely that Brexit will not be a game changer for the EU and its member states, but rather for the UK itself.

partner, both for the limited value added of its services beyond legal and financial niche areas, and also because it is now in competition with (and no longer part of) the biggest trading bloc in the world.⁷ Furthermore, African trade interests may focus on other priorities than what the UK can offer, for instance in the manufacturing sector, where other EU member states, such as Germany, are very compet-

itive. Second, with regard to development aid, with Brexit the EU loses one of the main donor countries, which will have consequences for financial contributions to the Official Development Assistance (ODA) budget, the European Development Fund (EDF) and other EU instruments. However, EU member states will be able to rebalance their own contribution in order to fill the gap. Conversely, it may be difficult for

⁴ Ibid.

⁵ House of Commons Foreign Affairs Committee, *Building Bridges: Reawakening UK-India Ties: Government Response to the Committee’s Eighteenth Report of Session 2017-19*, June 2019, <https://publications.parliament.uk/pa/cm201719/cmselect/cmfaff/2633/2633.pdf>.

⁶ Government of France, *Strategic Review of Defence and National Security*, October 2017.

⁷ Juliana Suess, “The UK’s policy towards Africa post-Brexit”, Policy Center for the New South, *Policy Brief*, May 2019, <https://www.policycenter.ma/sites/default/files/PCNS-PB1719.pdf>.

the UK to increase public spending for development aid, should Brexit have a negative impact on the economy; and London will lose an important multilateral support system for its programmes.⁸ Finally, regarding security engagement, the UK's contribution to the EU's CSDP missions and operations has traditionally been limited, so the effects of Brexit will not

be felt significantly at the EU collective level.⁹ What can be affected are instead the bilateral defence and security partnerships; here, the UK's tendency to partner with non-EU states as part of its Global Britain approach could have deep implications for its relations with European partners, but this change will be felt more in the UK than in the EU.

⁸ Ibid.

⁹ Bastian Giegerich and Christian Mölling, "The United Kingdom's contribution to European security and defence", *DGAP-IISS Policy Brief*, February 2018, https://dgap.org/system/files/article_pdfs/the_united_kingdoms_contribution_to_european_security_and_defence.pdf.

CHAPTER 5

A COMMON EU APPROACH?

Assuming that Brexit has a limited impact on EU-Africa relations, a final and fundamental question for European strategies arises as to whether the EU and its member states speak the same language in their engagement with sub-Saharan Africa. Are strategic initiatives undertaken at the collective EU level compatible with those undertaken by individual member states?

While relations between the EU and Africa are deep, complex and multi-layered, the strategic framework has in the last decade been provided by the Joint Africa-EU Strategy (JAES), adopted at the AU-EU Summit in Lisbon in December 2007.¹ As part of the broader process of redefinition of a stronger partnership between the EU and Africa during 2020, the EU is now developing a new strategy with Africa, building on the agenda jointly agreed at the 2017 AU-EU Summit in Abidjan and in order to update the JAES.

This process started with the March 2020 Joint Communication issued by the Commission and the High Representative. The document includes the core elements of the new strategy based on strengthened cooperation in five key areas: (i) green transition; (ii) digital transformation; (iii) sustainable jobs and growth; (iv) peace and governance; (v) migration and mobility. In addition to actions aimed at taking forward the partnership in those areas, this first 'draft' of the new EU strategy identifies streams of work for the EU and the AU

to achieve their ambitions and protect their common strategic interests in the increasingly competitive international system, on three levels: global, bilateral, and internal-EU.

At the global level, the AU and the EU commit to foster a rules-based international order and multilateralism, through the promotion of global cooperation and regional integration as the best guarantees for stability and economic growth. At the bilateral level, the new strategy calls for more coherence among the different sub-components of Africa-EU relations, including in the negotiations for the post-Cotonou Agreement with the ACP group, but also in addressing fragility, conflict and violence in a more effective way. On the EU side, the strategy acknowledges that Europe remains Africa's biggest partner in terms of investment, trade and development, and it is essential to deliver on the expected results of engagement and cooperation. The document highlights the importance of matching ambition with resources, for instance by proposing that the Neighbourhood, Development and International Cooperation Instrument as of 2021 earmarks over 60% of funds available to it for sub-Saharan Africa.²

The other strategic document where the EU articulates its approach towards sub-Saharan Africa is the EU Global Strategy (EUGS).³ Here, the emphasis is placed on two axes of cooperation: first, the support to peaceful developments in the continent, in particular between North

1 European Commission, "A Joint Africa-EU Strategy", July 15, 2019, https://ec.europa.eu/knowledge4policy/publication/joint-africa-eu-strategy_en.

2 Op. Cit., "Towards a Comprehensive Strategy with Africa", p. 17.

3 European External Action Service, "Shared Vision, Common Action: A Stronger Europe. A Global Strategy for the European Union's Foreign And Security Policy", June 2016, https://eeas.europa.eu/sites/eeas/files/eugs_review_web_o.pdf.

Africa and sub-Saharan Africa, to address key security challenges affecting the EU's neighbourhood; second, an increase of EU support to the role of Regional Economic Communities (RECs) in projecting stability and peace, as well as their contribution to fostering sustainable growth. The African continent is also mentioned as a key arena for the implementation of the EU's integrated approach to external conflicts and crises. Instruments mobilised or supported by the EU to support these objectives include the African Peace Facility (APF) and the African Peace and Security Architecture (APSA); military and civilian missions under the CSDP, which are currently deployed in the Sahel, the Horn of Africa and the Central African Republic; as well as other development and economic instruments contributing to peace and security, such as the Trust Fund for Africa, which addresses crises in the Sahel, Lake Chad Basin, Horn of Africa and North Africa.

On the surface, the EU strategic posture outlined in the Joint Communication and in the EUGS seems perfectly in line with that of many EU member states. The thematic priorities largely overlap, with the five key areas outlined in the Joint Communication featuring prominently also in national strategic documents. The EU-27, pretty much like the majority of individual member states, aims to leverage a wide range of instruments and implement a comprehensive approach, which mixes soft and hard power elements, in its engagement with the African sub-continent. The geographic distribution of CSDP missions and operations

essentially overlaps with EU member states' military presence.

Does this entail that the EU is finally embracing its 'power' potential, in the relationship with sub-Saharan Africa, harmonising and maximising the impact of its national strategies? As the High Representative Josep Borrell Fontelles wrote in a recent op-ed, Europe's problem is not a lack of power *per se*. There are plenty of instruments, as described above, to project influence. The problem is still the 'lack of political will for the aggregation of its powers to ensure their coherence and maximize their impact'.⁴ In other words, moving from the strategy to action, coherence is not an *acquis*. Whether the EU acts as a dormouse, a hippo or a lion, it is not a matter of capacities or strategic ambition, but ultimately a political choice when it comes to engage in context-specific situations where national interests may prevail.

From a strategic point of view, two key priorities will drive the definition of a new strategy towards Africa, and contribute to reinforce the EU's collective engagement. First, sustained and coherent action to address fragility, conflict and violence, to prevent the continent from spiralling into uncontrolled instability. Second, a more tailored, differentiated and pragmatic approach to address sub-Saharan Africa's economic, political and societal challenges, so that the Union is up to the competition with other global actors. Here is where European strategies will inevitably meet global ones.

4 Op. Cit., 'Embracing Europe's Power'.



DAURA



**GLOBAL
STRATEGIES
TOWARDS
SUB-SAHARAN
AFRICA**

Europeans are far from alone in Africa. The scale of non-European powers' engagement in Africa is unprecedented and constrains Europe's ability to act strategically, given the swift pace of developments and the presence of a wider pool of competitors. The 'new scramble for Africa', defined as the growing engagement by non-traditional powers with the continent over the last decade, has produced intense diplomatic activity, commercial exchanges, political influences and financial flows between sub-Saharan Africa and the rest of the world, *de facto* making it a geo-economic crossroads, or a global marketplace. There are at present nine continent-wide leaders' summits regularly organised by foreign powers to frame their strategy and involvement with Africa. In addition to France and the EU, Japan, China, India, Turkey, the Arab states, United States and Russia have

established regional summits which are attended by nearly all African leaders, accompanied in turn by a cohort of policymakers, entrepreneurs, and intellectuals.¹ Russia has been the latest country to engage in summit diplomacy, gathering in Sochi (23-24 October 2019) representatives from all the 54 countries of Africa, and 3,000 business and other delegates. The Sochi Summit has been highly symbolic and marked a milestone for African agency in international relations: African countries added Russia to the list of strategic partners, proving an ability to leverage cooperation to maximise their interests. And while the Summit was in reality a sequencing of bilateral agreements, Putin succeeded in selling it as a celebration of Africa's collective ambitions, potential and self-determination.

¹ Judd Devermont, "The Art of Summitry", Center for Strategic and International Studies (CSIS), September 30, 2019, https://csis-prod.s3.amazonaws.com/s3fs-public/publication/190930_Devermont_TICAD_layout_v4_FINAL.pdf.

CHAPTER 6

THE ASIAN CHESSBOARD

This section reviews global actors' strategies in sub-Saharan Africa, in order to gauge patterns of multipolar competition, identify areas in which the strategic interests of Europe and the rest of the world may diverge, leading to confrontation, but also possibilities of convergence, which could reinforce multilateral cooperation to address common challenges.

The new geopolitical centrality of sub-Saharan Africa is reflected in the growing presence of Asian countries. The focus of this chapter is on China, India and Japan. It first examines the main reasons and tenets of China's engagement, to analyse what this means for EU member states in terms of strategic competition; then the chapter moves to the analysis of India's and Japan's strategies in sub-Saharan Africa, with a special focus on the Indian Ocean, where Tokyo and New Delhi share key interests and values with Europe, which could pave the way for a deepening of cooperation in the future.

CHINA

China's large-scale presence in sub-Saharan Africa is a reality with which EU member states and other global powers inevitably have to cope. The Forum for China-Africa Cooperation (FOCAC), created in 2000, reflects Beijing's ability to build a network of strong political and economic partnerships to advance its strategic

interests. But what are Beijing's interests in the African sub-continent? And what are the political and economic implications for EU member states?

Politically speaking, sub-Saharan countries represent for China a platform to strengthen its international stance and consolidate its global projection. African countries play an important role in multilateral fora, especially in the UN, where they account for more than one quarter of UN member states. Their support is valuable to foster China's political agenda, on issues ranging from human rights to UN reform, from regional security to China's Tibet or Xinjiang policy. Moreover, enhancing its political influence means ending Taiwan's presence on the continent and strengthening the validity of Beijing's 'One China' policy. In fact, after a temporary period of truce, a diplomatic war between Beijing and Taipei has resumed over the last decade. The strategy of the People's Republic of China, combining strong diplomatic activism and significant investments and offers of loans, has yielded dividends, as Eswatini is the only country in Africa to still have diplomatic relations with Taipei, after Burkina Faso and São Tomé and Príncipe severed their official diplomatic ties with Taiwan respectively in 2018 and 2016.²

The economic dimension is another pillar of China's active diplomacy in the sub-continent. It is not only a fundamental element to secure imports of strategic resources but also a powerful vector to expand the internationalisation

2 Ben Blanchard, "China wins back Burkina Faso, urges Taiwan's last African ally to follow", *Reuters*, May 26, 2018, <https://www.reuters.com/article/us-china-burkina/china-wins-back-burkina-faso-urges-taiwans-last-african-ally-to-follow-idUSKCN1IR09W> and "African island nation Sao Tome cuts diplomatic ties with Taiwan", *BBC News*, December 21, 2016, <https://www.bbc.com/news/world-asia-38388181>.

China's Belt and Road Initiative

Sub-Saharan African countries that signed a cooperation agreement with China as part of the BRI



Data: Belt and Road Portal, 2020; Green Belt and Road Initiative Center, 2020; Natural Earth, 2020

of China’s major state-owned and private companies. In line with the ‘Go out policy’ launched in 1999, over the last two decades China has increased its economic footprint on the continent. Africa is an important market for China, to balance domestic overproduction and diversify market destinations, especially after the 2008 global economic and financial crisis which directly affected Chinese export industries. Furthermore, China’s labour-intensive industries, which have had to deal with rising labour costs at home, could decide to partially relocate their

production in African countries, where labour costs are lower,³ although some Southeast Asian countries offer the same competitive advantage. For instance, to take advantage of this situation, Ethiopia started an ambitious industrial parks development programme to provide infrastructures and incentives for investors in light-manufacturing industries.⁴

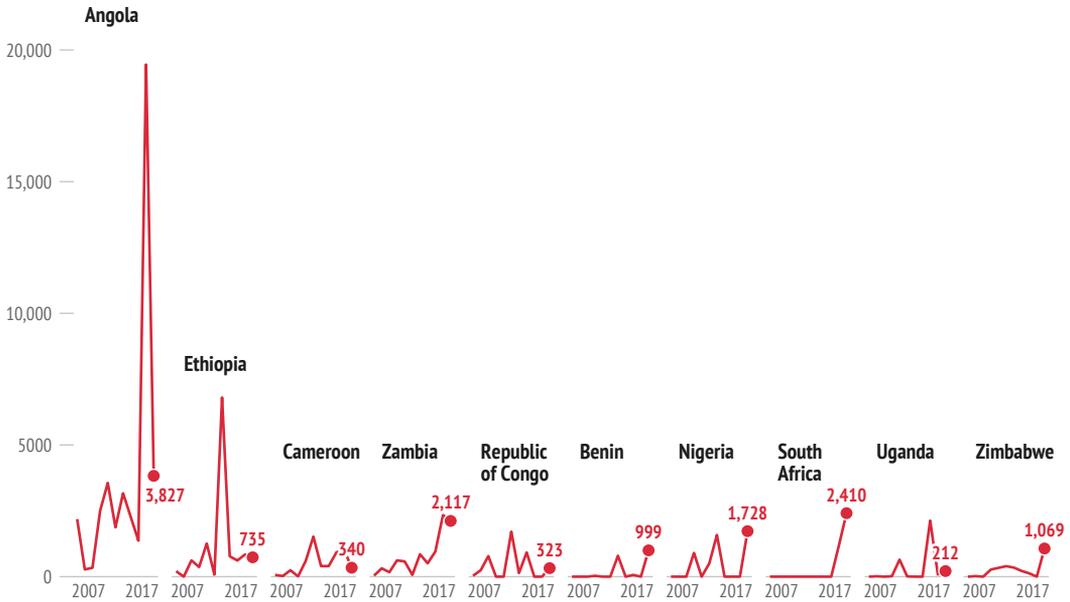
In September 2018, China hosted the seventh FOCAC, where President Xi Jinping pledged \$60 billion in financing and encouraged Chinese

3 Jiajun Xu, Stephen Gelb, Jiewei Li and Zuoxiang Zhao, “Adjusting to rising costs in Chinese light manufacturing”, Center for New Structural Economics, December 2017, https://set.odi.org/wp-content/uploads/2017/12/SET_Survey-report_Chinese-manufacturing_Final.pdf.

4 Tilman Altenburg, “Migration of Chinese manufacturing jobs to Africa: Myth or reality?”, Brookings, March 5, 2019, <https://www.brookings.edu/blog/africa-in-focus/2019/03/05/migration-of-chinese-manufacturing-jobs-to-africa-myth-or-reality/>.

China's debt diplomacy

Top ten countries in sub-Saharan Africa receiving loans from China in 2017, \$ million, 2007-2017



NB: these figures reflect loan commitments, and should not be regarded as equivalent to sub-Saharan government debt, as a portion of signed loans are not disbursed, and a significant portion have been repaid. Data: SAIS China Africa Research Initiative, 2020;

companies to invest no less than \$10 billion over the following three years⁵. China's investments are mainly in the sector of infrastructure, and especially in ports, as they play a key role in the 'Maritime Silk Road', providing a gateway to the region's trade, and empowering China with remarkable political leverage.⁶ The growing importance of Africa in Beijing's strategic approach is confirmed by the increasing number of sub-Saharan countries – 39 as of June 2020 – that signed a cooperation agreement with China as part of the 'Belt and Road Initiative' (BRI). China's growing role as an infrastructure financier is based on a deal structure which allows countries that do not have adequate financial guarantees to repay their loan for infrastructure development by natural resources, for instance oil. This model, known as 'Resources for Infrastructures' (R4I), has been largely used by the China Ex-Im Bank as it allows Beijing to 'kill

two birds with one stone': fostering economic penetration by securing access to strategic natural resources and increasing its geopolitical leverage.

What does it mean for Europe?

From an economic standpoint, China's BRI is undoubtedly a tough competitor for Europe's private sector. Beijing's economic penetration in Africa can however be seen as a driver for EU member states to increase their economic presence in the sub-continent and differentiate their economic footprint. Capitalising on EU-China know-how complementarity, through enhancing trilateral business cooperation, can prove to be a successful strategy to develop joint infrastructure projects, with the

5 Christian Shepherd and Ben Blanchard, "China's Xi offers another \$60 bln to Africa, but says no to 'vanity' projects", *Reuters*, September 3, 2018, <https://af.reuters.com/article/topNews/idAFKCN1LJoIO-OZATP>.

6 Judd Devermont, "Assessing the Risks of Chinese Investments in Sub-Saharan African Ports", Center for Strategic International Studies (CSIS), June 4, 2019, <https://www.csis.org/analysis/assessing-risks-chinese-investments-sub-saharan-african-ports>.

threefold result of developing private sector cooperation, strengthening African entrepreneurial environment and fostering confidence towards EU companies.⁷ There are some promising examples, but such a strategy also has its limits. For instance, Italy has cooperated with China in Ethiopia for the construction of the Renaissance Dam and in Mozambique for the exploration of gas resources, in a joint venture which includes also the Portuguese GALP. France-China cooperation gained new momentum in 2016 with the establishment of the Sino-French Fund for Third Country Cooperation and the importance of cooperation in third markets was also confirmed in 2018.⁸ The main limitations of this cooperative approach are twofold. First, the African private sector is not yet solid enough to promote a model of cooperation across the full spectrum of business activities. A second limitation is of a normative nature, as EU member states have the responsibility to act in compliance with EU law, rules and policies, as clearly stated in the 2019 EU-China Strategic Outlook,⁹ and this risks being a fault line where ideological and political differences might clash.

The challenges related to 'debt-trap diplomacy' represent a chance for EU countries to give a new boost to their economic partnerships in the sub-continent.

A main challenge for EU countries resulting from China's Africa strategy is related to China's 'no (political) strings attached' approach to granting loans and credit, considered by African partners as more attractive compared to conditional Western credit lines. China may use debt as leverage on their assets and sovereignty. This so-called 'debt-trap diplomacy' is very harmful for African economic integrity and national sovereignty and has raised various concerns among many African capitals, who are now seeking to counterbalance their over-dependence on opaque Chinese loans. The challenges related to 'debt-trap diplomacy' represent a chance for EU countries to give a new boost to their economic partnerships in the African sub-continent, with the EU differentiating itself by strengthening good governance and civil society.¹⁰ China is well aware of how damaging for its reputation these allegations might be, and for this reason decided to write off the debts of some sub-Saharan countries, such as Zimbabwe,¹¹ Botswana,¹² Angola¹³ and Republic of Congo.¹⁴ Ethiopia and Zambia have also requested debt restructuring.¹⁵ This process might be accelerated by the spread of Covid-19 in Africa, as the

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- 7 Sara Bertucci and Margherita Locatelli, "Advancing EU-China-Africa trilateral partnerships: the role of joint business ventures in promoting sustainability, innovation and institutional synergies", European Institute for Asian Studies (EIAS), *Briefing Paper*, January 2020, http://www.eias.org/wp-content/uploads/2019/07/SaraMargherita_A-EU-CN-1.pdf.
 - 8 Ministry of Finance of France, *China-France Joint Fact Sheet on the 6th High Level Economic and Financial Dialogue*, Paris, December 7, 2018, https://www.gouvernement.fr/sites/default/files/locale/piece-jointe/2018/12/111_china-france_joint_fact_sheet_on_the_6th_high_level_economic_and_financial_dialogue.pdf.
 - 9 European Commission, *EU-China Strategic Outlook*, Joint Communication to the European Parliament, the European Council and the Council, Strasbourg, March 12, 2019, <https://ec.europa.eu/commission/sites/beta-political/files/communication-eu-china-a-strategic-outlook.pdf>.
 - 10 Anca-Elena Ursu and Willem van den Berg, "China and the EU in the Horn of Africa: competition and cooperation?", *CRU Policy Brief*, Clingendael, April 2018, https://www.clingendael.org/sites/default/files/2018-04/PB_China_and_the_EU_in_the_Horn_of_Africa.pdf.
 - 11 Crecy Kuyedzwa, "China writes off Zim's debt," *Fin24*, April 5, 2018, <https://www.fin24.com/Economy/china-writes-off-zims-debt-report-20180405>.
 - 12 "China writes off loans," *Botswana Daily News*, September 2, 2018, <http://www.dailynews.gov.bw/news-details.php?nid=44959>.
 - 13 "China agrees to partial write-off Angola's debt", *Agência Angola Press*, June 5, 2017, http://www.angop.ao/angola/en_us/noticias/politica/2017/5/23/China-agrees-partial-write-off-Angola-debt,73246665-509c-48a2-ae40-415d3fb65b00.html.
 - 14 "China agrees to restructure Republic of Congo's debt, African nation says", *South China Morning Post*, May 4, 2019, <https://www.scmp.com/news/china/diplomacy/article/3008843/china-agrees-restructure-congo-republics-debt-african-nation>.
 - 15 Joe Bavier and Christian Shepherd, "Despite debt woes, Africa still sees China as best bet for financing," *Reuters*, August 30, 2018, <https://www.reuters.com/article/us-china-africa/despite-debt-woes-africa-still-sees-china-as-best-bet-for-financing-idUSKCN1LF2RM>.

International Monetary Fund, the World Bank and G20 countries have called on Beijing to support Africa's post-Covid economic recovery through debt relief. Nevertheless, even if China has participated in this collective effort and has provided masks and specialised medical personnel, Beijing has already labelled total debt relief as 'not simple nor effective', and postponement of loan payments or debt restructuring seems to be a more feasible option.¹⁶

Finally, as regards the security dimension, China has strengthened its military presence on the African sub-continent with the aim of protecting Chinese investment and enterprises as well as their personnel, and safeguarding maritime shipping lanes. In this regard, the Horn is a key area for China, by virtue of its geostrategic location in the framework of the BRI. In 2017 China opened a base in Djibouti, which served as a 'strategic strong point,' to provide support for overseas military operations and act as a forward base for deploying military forces overseas.¹⁷ China is also the seventh contributor to the United Nations Mission in South Sudan (UNMISS). The People's Liberation Army Navy (PLAN) has also increased naval forces in the Indian Ocean and it plans to have 351 vessels by 2020, providing China with capability to sustain maritime operations in blue-water areas. While in theory there is a convergence in terms of security interests between Beijing and European capitals, in terms of fight against piracy, counterterrorism and ensuring SLOCs,¹⁸ the militarisation of the Horn represents a dangerous growing trend and a threat to regional stability, and could backfire on EU interests.

JAPAN

Over the last few years, Japan has accelerated and widened its engagement in sub-Saharan Africa, revigorating its foreign policy approach on the basis of a new model of development cooperation and a more proactive security commitment. The most visible demonstration of this growing interest is the organisation of the seventh Tokyo International Conference on African Development (TICAD) in Kenya in 2016, the first time that the TICAD took place outside of Japan. This deeper engagement reflects a broader strategic thinking in which sub-Saharan Africa plays a key role from an economic and security perspective and at the same time is fundamental to balance Chinese global economic and political ambitions, especially in the Indian Ocean.

From an economic perspective, sub-Saharan countries are strategic partners for Japan in terms of both exports and imports. Japan imports from Africa more than what it exports.¹⁹ The reason behind this trade imbalance is Japan's poor endowment in natural resources, which makes the country overdependent on African natural resources, mainly platinum and iron from South Africa and oil, gas and raw aluminium from Nigeria. To further support Japanese firms in these key sectors, in 2014 Tokyo created the Japan Oil, Gas and Metals National Corporation (JOGMEC),²⁰ whose main objective is to 'ensure stable supplies of oil and natural gas collaborating with national oil companies, and providing them with advanced technical

16 Yun Sun, "China and Africa's debt: Yes to relief, no to blanket forgiveness", *Brookings*, April 20, 2020, <https://www.brookings.edu/blog/africa-in-focus/2020/04/20/china-and-africas-debt-yes-to-relief-no-to-blanket-forgiveness/> and Song Wei, "African debt to China may be solved through bilateral talks on the basis of equality", *Global Times*, April 16, 2020, <https://www.globaltimes.cn/content/1185860.shtml>.

17 Conor Kennedy, "Strategic Strong Points and Chinese Naval Strategy", The Jamestown Foundation, March 22, 2019, <https://jamestown.org/program/strategic-strong-points-and-chinese-naval-strategy/>.

18 As demonstrated, for instance, by the combined medical evacuation exercise between the Chinese Navy and EUNAFOR in October 2018.

19 In 2017, Japan exported \$7.5 billion in goods to Africa while in the same year it imported \$8.3 from Africa: The Observatory of Economic Complexity (OEC), Japan & Africa trade data, <https://oec.world/>

20 In 2008, JOGMEC opened the Botswana Geological Remote Sensing Centre and in 2019 announced the plan to open a new office in Johannesburg.

training and equity capital and liability guarantees.²¹

The other important driver of Japanese foreign policy towards sub-Saharan Africa is the attempt to balance the rise of China. From an economic point of view, Japan aims to increase business opportunities for Japanese firms taking advantage of increasing disquiet about Chinese 'debt-trap diplomacy'. The promotion of business was the main focus of the seventh TICAD (August 2019), in which Prime Minister Abe announced that 'the government of Japan will put forth every possible effort so that the power of Japanese private investment, of \$20 billion in three years, should in the years to come be surpassed anew from one day to the next'.²² TICAD7 represents a turning point for Japanese Africa policy, as it marks a shift away from substantial ODA commitments towards an increasing role of the private sector: the Public-Private Partnership (PPP), utilising ODA, can 'implement projects of a highly public nature more efficiently and effectively [...] for example, basic infrastructure is covered by ODA, while investment, operation, maintenance and management are conducted by the private sector'.²³ The reason for the growing role attributed to the private sector is to be sought in Japan's awareness that a mainly ODA-driven economic diplomacy could not compete with Beijing's funds and financial resources.²⁴

From a security standpoint, the need to contain China together with Abe's global ambitions

have led Japan to step up its security engagement. In 2011, Tokyo opened its first military base outside Japan since World War II, in Djibouti, deploying around 390 persons from both the Japanese Self-Defence Force (JDSF) and the Japan Coast Guard (JCG).²⁵ Nevertheless, Japanese military outreach is constrained by the Japanese constitution which prohibits the use of force as a foreign policy instrument. Waiting to see if Abe's efforts to revise the constitution will be successful, in the meantime Japan has strengthened military cooperation with India. In 2018, India was reported to be in discussions with Japan about an agreement on military logistics in the Indo-Pacific region, including the possibility for India to use Japan's base in Djibouti.

What does it mean for Europe?

Japan's growing interest in sub-Saharan Africa represents a factor which can expand the strategic space of cooperation with Europe. The renewed importance attached to the private sector by Japan, in particular, is in line with EU member states' strategic approach and opens up new opportunities of cooperation to increase economic and institutional synergies and, as a result, support the development of an African entrepreneurial environment.

Japan can rely on its longstanding engagement as top ODA donor. It can boast its long experience in the infrastructure sector, where Japanese firms generally have a good reputation for

21 Japan Oil, Gas and Metal National Corporation (JOGMEC), JOGMEC official website, <http://www.jogmec.go.jp/english/oil/index.html>.

22 Keynote Address by Mr. Shinzo Abe, Prime Minister of Japan at the Opening Session of the Seventh Tokyo International Conference on African Development (TICAD 7), At Pacifico Yokohama, August 28, 2019, https://www.mofa.go.jp/af/afi/page4e_001069.html.

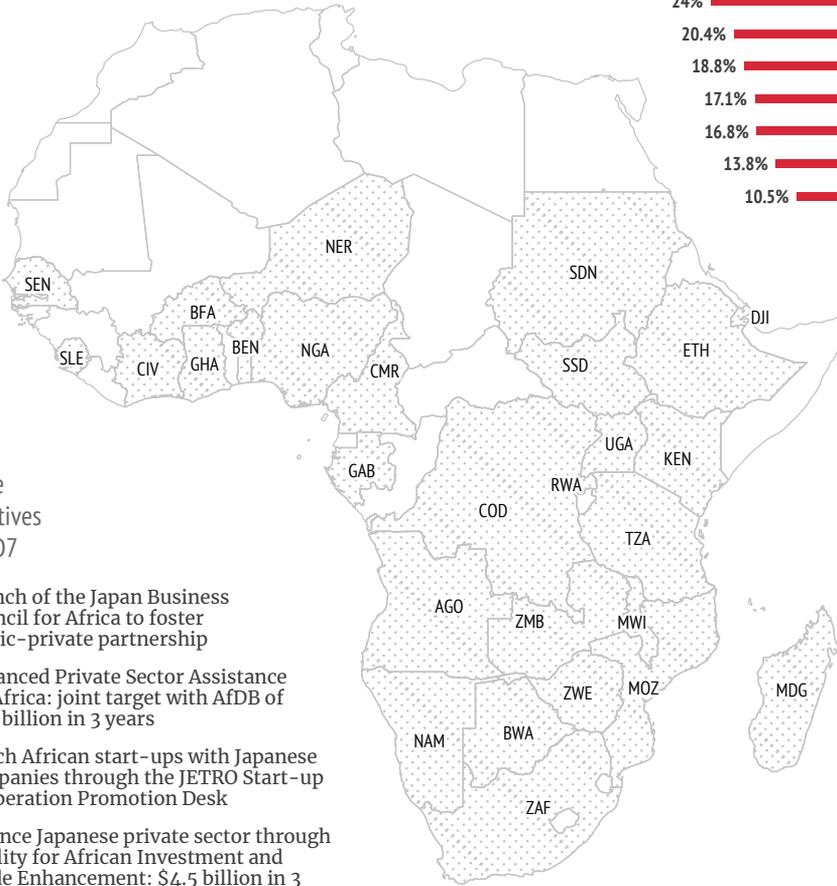
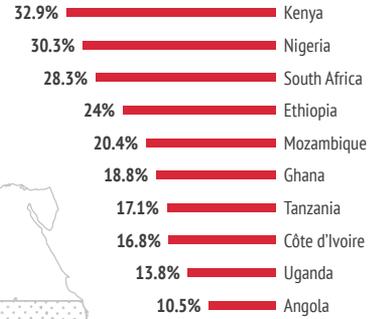
23 Ministry of Foreign Affairs of Japan, "White Paper on Development Cooperation 2018: Japan's International Cooperation", M2019, <https://www.mofa.go.jp/files/000554934.pdf>.

24 J. Berkshire Miller, "Japan is Taking on China in Africa", *Foreign Policy*, August 22, 2019, <https://foreignpolicy.com/2019/08/22/japan-is-taking-on-china-in-africa/>.

25 Carina Gunnarson, "Japan – Towards 'Pro-active Collective Self-defence'", in "Foreign Military Bases and Installations in Africa", *FOI report*, August 2019.

Japan: from ODA to private sector investments

Top ten future investment destinations of Japanese companies in sub-Saharan Africa



Main private sector initiatives of the TICAD7

- Launch of the Japan Business Council for Africa to foster public-private partnership
- Enhanced Private Sector Assistance for Africa: joint target with AfDB of \$3.5 billion in 3 years
- Match African start-ups with Japanese companies through the JETRO Start-up Cooperation Promotion Desk
- Finance Japanese private sector through Facility for African Investment and Trade Enhancement: \$4.5 billion in 3 years
- Enhance risk money supply for Japanese private sector by JOGMEC
- Promote JICA's Private Sector Investment Finance (PSIF) for African countries based on MoU to be signed between JICA and AfDB

Data: Japan International Cooperation Agency, 2020; Ministry of Foreign Affairs of Japan, 2020; Natural Earth, 2020; JETRO, 2019 Survey on Business Conditions of Japanese Affiliated Companies in Africa

the high quality of their construction output. Another strength is Japanese distinctiveness as a global technology leader²⁶ and ability to invest

in human capital, as its companies tend to use a high percentage of local workers and are committed to developing people's skills, through,

26 Brittany Morreale and Purnendra Jain, "Japan's new model of Africa engagement", *EastAsiaForum*, September 6, 2019, <https://www.eastasiaforum.org/2019/09/06/japans-new-model-of-africa-engagement/>.

for instance, the Kaizen techniques.²⁷ Japanese companies have been seeking to expand their business by avoiding risks through new methods such as coordination with third-country companies, such as South African, French and Indian companies.²⁸ Trilateral business cooperation represents a huge opportunity for EU member states, especially when it comes to 'quality infrastructure', which besides being the hallmark of Japanese industry, is also the focus of the Partnership on Sustainable Connectivity and Quality Infrastructure between Japan and the EU.²⁹ Moreover, Japan's successful experience in developing human capital would be an added value for EU member states in ensuring that economic partnerships are as beneficial as possible for African countries.

A broader and more ambitious framework of cooperation with the EU is however to be conceived as part of the growing synergies between Japan and India in the Indian Ocean.

INDIA

As Prime Minister Modi stated in a historical speech to the Ugandan Parliament in July 2018, Africa is a top priority for India, and New Delhi will continue to intensify and deepen its engagement with Africa in a sustained and regular manner.³⁰ A tangible demonstration of Africa's

increased importance in Indian foreign policy is the organisation of three India-Africa summits, in 2008, 2011 and 2015. New Delhi plans to open 10 new embassies by 2021,³¹ in addition to the embassies opened in 2018-2019 in Burkina Faso, Cameroon, Djibouti, Equatorial Guinea, Eritrea, Eswatini, Republic of Guinea and Rwanda. India's Africa policy can count on 'a firm historical foundation of a shared colonial past and similarity of post-independence development experience'.³² This common historical background provides New Delhi with a comparative advantage, as India can portray itself as a champion in the fight against colonialism and a strong ally of African countries in building, in Modi's words, 'a representative and democratic global order that has a voice and a role for one-third of humanity that lives in Africa and India'.³³

India aims to advance its economic and security interests on the continent. Similarly to Japan, Africa is of crucial importance for New Delhi to secure and diversify energy provision, and also to avoid overdependence on Middle Eastern countries. India's largest partner is South Africa, even though Nigeria is gaining importance as the first African country from which India imports crude oil.³⁴ Strengthening trade as well as investment opportunities is a key area in which India wants to cooperate more, with mutual benefits both for India and African countries, as 'Indian companies, through their experience, technology and capital, can unlock

27 Japan International Cooperation Agency (JICA), *Kaizen handbook*, June 2018, https://www.jica.go.jp/english/news/field/2018/c8hovm000diyoh4-at/KaizenHandbook_Main.pdf.

28 As the Japan External Trade Organisation (JETRO) underlined in a 2019 survey, Japanese firms continue to see many risks in investing in Africa, namely lack of compliance with local practices, norms and laws, social and political instability, unskilled local workforce and poor infrastructures. Hence the interest in seeking cooperation with other global players. See: <https://www.jetro.go.jp/en/news/releases/2020/21e9c3d8ed499d.html>.

29 European External Action Service (EEAS), *The Partnership on Sustainable Connectivity and Quality Infrastructure between the European Union and Japan*, Brussels, September 27, 2019, https://eeas.europa.eu/regions/africa/68018/partnership-sustainable-connectivity-and-quality-infrastructure-between-european-union-and_en.

30 Ministry of External Affairs of India, "Prime Minister's address at Parliament of Uganda during his State Visit to Uganda", Kampala, July 25, 2018, https://mea.gov.in/Speeches-Statements.htm?dtl/30152/Prime_Ministers_address_at_Parliament_of_Uganda_during_his_State_Visit_to_Uganda.

31 Dipanjan Roy Chaudhury, "Budget 2019: India to open 18 new diplomatic missions across Africa", *The Economic Times*, July 5, 2019, <https://m.economictimes.com/news/politics-and-nation/budget-2019-india-to-open-18-new-diplomatic-missions-across-africa/articleshow/70093835.cms>.

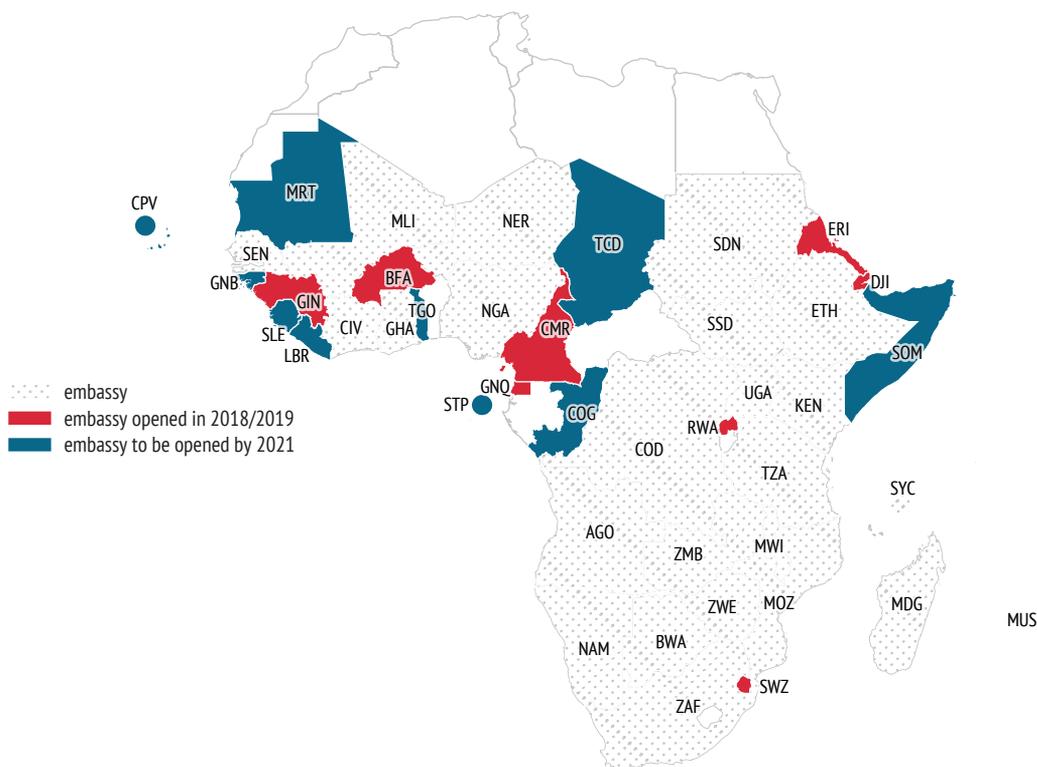
32 M. Ganapathi, "India-Africa Partnership", in Ruchita Beri (ed.), *India and Africa: Enhancing Mutual Engagement* (New Delhi: Pentagon Press, 2014), p. 24.

33 Op.Cit., "Prime Minister's address at Parliament of Uganda during his State Visit to Uganda."

34 The Observatory of Economic Complexity (OEC), India & Africa trade data, 2017, <https://oec.world/>

India's diplomatic footprint

Indian embassies in sub-Saharan Africa



Data: Ministry of External Affairs of India, 2020; Natural Earth, 2020

African resources and create value for host governments'.³⁵ As for Japan, this is the cornerstone of India's Africa policy, and an element of added value that distinguishes it from the Chinese economic offer: India wants to promote a development partnership guided by African priorities, free of conditionalities and totally demand-driven.

In order to maximise trade and investment opportunities, as well as ensure energy security and fight terrorism and piracy, India has enhanced its security engagement in sub-Saharan Africa, an element which has always been a hallmark of its international stance. India's

security projection is based on two main tenets: on the one hand, its longstanding participation in UN peacekeeping operations and, on the other hand, its network of defence cooperation with sub-Saharan countries. With regard to the first pillar, India has always been strongly committed to UN blue helmet missions and is currently the third contributor to UN peacekeeping operations in sub-Saharan Africa with 4,420 personnel deployed.³⁶ India's involvement in these missions has been constant over the last few decades, underpinning its aspiration to be recognised as a great power and its quest for a permanent seat at the UN Security Council. When it comes to defence cooperation, India

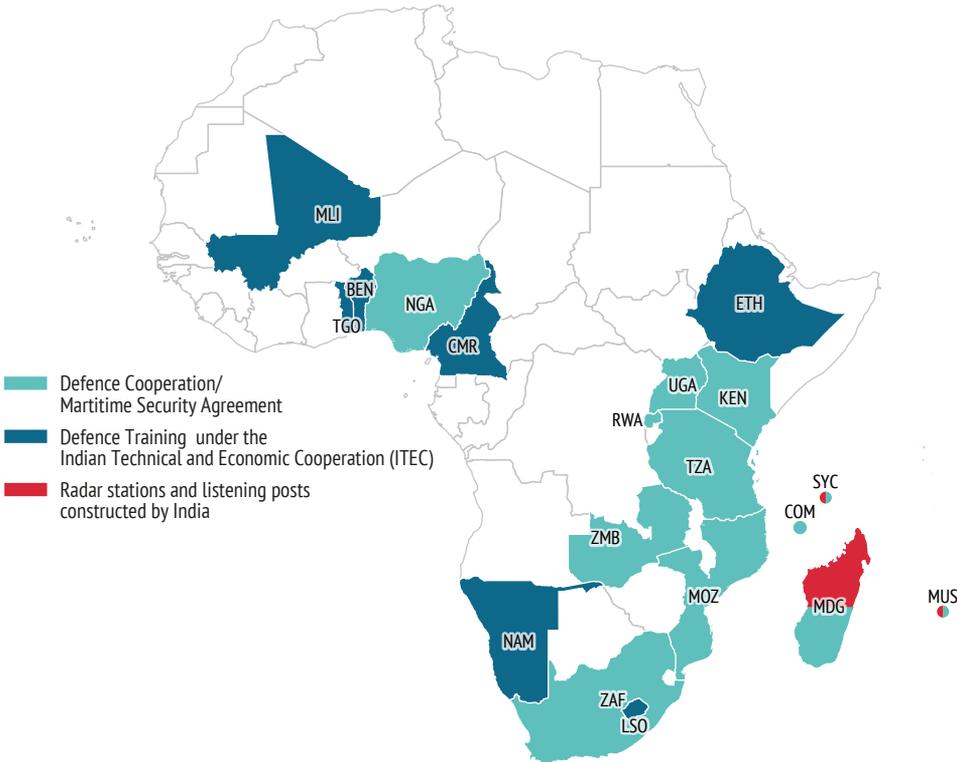
³⁵ Remarks by Shri T.S. Tirumurti, Secretary (ER) at Africa Day round-table discussion in IDSA on: "India-Africa Partnership in a changing world": <https://idsa.in/keyspeeches/remarks-shri-ts-tirumurti-india-africa-partnership>

³⁶ United Nation Peacekeeping Operations, <https://peacekeeping.un.org/en/troop-and-police-contributors>.

Indian security architecture

In sub-Saharan Africa

In addition to defence training and defence cooperation agreements with several sub-Saharan African countries, India has defence logistics agreements with the United States and France to facilitate port visits, joint training and joint exercises.



Data: Ministry of External Affairs of India, 2020; FOI, 2019; Natural Earth, 2020

has always been involved in this sector, particularly in military training: since the mid-1960s, India has provided training and infrastructure development assistance to different countries in sub-Saharan Africa such as Ethiopia, Nigeria, Mauritius, Zambia, Ghana, Sudan, Botswana, Seychelles, South Africa, Tanzania and Lesotho.³⁷ While it has no military base in the Horn, India can boast a well-established network of security partnerships. For instance,

India has a defence logistics agreement with the United States and France which aims to facilitate port visits, joint exercises and training, and which could allow Indian warships access to US and French Indo-Pacific bases. Prime Minister Modi has given a new boost to military cooperation and intelligence exchange with Kenya, Mozambique, South Africa and Tanzania.³⁸ Besides these countries, as of May 2020, India has defence cooperation agreements with

³⁷ Ruchita Beri, "India-Africa security engagement", in Ruchita Beri (ed.), *India and Africa: Enhancing Mutual Engagement* (New Delhi: Pentagon Press, 2014), p.121.

³⁸ Kallol Bhattacharjee, "Delhi steps up security dialogue with Africa", *The Hindu*, July 5, 2016, <https://www.thehindu.com/news/national/Delhi-steps-up-security-dialogue-with-Africa/article14471108.ece>.

Comoros, Madagascar, Mauritius, the Seychelles and Zambia. New Delhi has also built radar stations in the Seychelles and Mauritius, a listening post in Madagascar,³⁹ and has provided defence training to Benin, Cameroon, Ethiopia, Lesotho, Mali, Namibia and Togo as part of the Indian Technical and Economic Co-operation (ITEC).

What does it mean for Europe?

The three main tenets of India's engagement – namely securing natural resources, increasing business opportunities and balancing China's rise – geographically converge with Japan in the region of the Indian Ocean. This area, in fact, is of major strategic importance to secure SLOCs, fight against piracy and contain China, which through the 'Belt and Road Initiative' (BRI) together with the China–Pakistan Corridor, has enhanced its economic and political influence and its military projection in the region.⁴⁰

In order to achieve these threefold objectives, New Delhi and Tokyo have stepped up strategic dialogue in order to develop joint policies in the Indian Ocean. The synergy between India and Japan culminated in 2017 in the Asia–Africa Growth Corridor (AAGC). The AAGC's aim is threefold: first, to advance India's and Japan's economic interests while promoting growth in Africa, through a partnership based on four main components: development and cooperation projects, quality infrastructure and

institutional connectivity, capacity and skill enhancement and people-to-people partnerships;⁴¹ second, to counterbalance China's influence; third, to increase connectivity between Africa and Asia in order to link the two areas to create a broad geostrategic space, the 'Indo–Pacific' region, underpinned by the principles of rule of law, territorial integrity, peaceful settlement of disputes and freedom of navigation and overflight. This latter element has been clearly outlined in the *Vision 2025* joint statement in which India and Japan committed themselves to develop a 'deep, broad-based and action-oriented partnership [...] to realise a peaceful, open, equitable and stable rule-based order in the Indo–Pacific region and beyond.'⁴²

India and Japan's commitment to fostering the strategic confluence of the Pacific and Indian Ocean,⁴³ and therefore of Asia and Africa,⁴⁴ is in line with the EU priority of bolstering connectivity in the region. The AAGC represents an opportunity for the EU to find new patterns of trilateral cooperation to ensure maritime security, boost trade and economic growth and at the same time preserve and advance the establishment of a rules-based international order. Against this backdrop, there is room for the EU and member states to deepen cooperation to invest in a free and open 'Indo–Pacific', upholding sustainable connectivity and quality infrastructures, as stated in the Joint Communication 'Connecting Europe and Asia – Building Blocks for an EU Strategy', launched by the European Commission and

39 Samuel Bergenwall, "India – A Rising Power in East African Waters", in "Foreign Military Bases and Installations in Africa", *FOI report*, August 2019.

40 Eva Pejsova, "The Indo-Pacific: A passage to Europe?", *EUISS Brief* no.3, March 2018.

41 African Development Bank Meeting, *Asia Africa Growth Corridor: Partnership for Sustainable and Innovative Development: A Vision Document*, May 22–26, 2017, <https://www.eria.org/Asia-Africa-Growth-Corridor-Vision-Documents-Full.pdf>.

42 Ministry of External affairs, Government of India, "Joint Statement on India and Japan *Vision 2025: Special Strategic and Global Partnership Working Together for Peace and Prosperity of the Indo-Pacific Region and the World*", New Delhi, December 12, 2015, https://www.mea.gov.in/bilateral-documents.htm?dtl/26176/Joint_Statement_on_India_and_Japan_Vision_2025_Special_Strategic_and_Global_Partnership_Working_Together_for_Peace_and_Prosperty_of_the_IndoPacific_R.

43 This concept was presented by Prime Minister Abe in a speech delivered in 2007 entitled "Confluence of the Two Seas". See: Ministry of Foreign Affairs of Japan, "Confluence of the Two Seas", Speech by H.E. Mr. Shinzo Abe, Prime Minister of Japan at the Parliament of the Republic of India, August 22, 2007, <https://www.mofa.go.jp/region/asia-paci/pmvo708/speech-2.html>.

44 To illustrate this convergence, Japan uses the expression 'Arc of Freedom and Prosperity'. See: Ministry of Foreign Affairs of Japan, "On the 'Arc of Freedom and Prosperity': An Address by H.E. Mr. Taro Aso, Minister for Foreign Affairs on the Occasion of the 20th Anniversary of the Founding of the Japan Forum on International Relations", International House of Japan, March 12, 2007, <https://www.mofa.go.jp/policy/pillar/address0703.html>.

the High Representative in September 2018.⁴⁵ Even though India does not necessarily have the same vision as the EU on all the dossiers – see for instance the complex issue of climate change – stepping up dialogue with New Delhi on maritime security, freedom of navigation and territorial integrity of coastal states should be considered as a key interest for the EU.

The strategic framework of an open and free ‘Indo-Pacific’ region, as discussed, has resulted in an increased Indian military presence in the Western Indian Ocean through selected partnerships. Against this backdrop, there is room for the EU to strengthen security and defence cooperation with India, fully availing of India’s longstanding experience as a maritime security provider in the Indian Ocean. It is important to identify common actions in line with shared interests, such as the fight against piracy and armed robbery, ensuring the security of SLOCs, the improvement of crisis management and the establishment of a rules-based order. To achieve this aim, it is crucial to reinforce the EU-India strategic partnership⁴⁶ to step up cooperation, for instance by carrying out joint training and assistance projects, encouraging regular exchanges of security experts, police and justice officials and military advisers, and increasing information sharing and joint maritime surveillance.

Moreover, New Delhi and EU capitals could work together on helping key regional players such as South Africa or Mozambique build their capacities to take on their responsibilities as maritime countries. In line with its aforementioned strategic focus on the region, France can boast an already well-established strategic framework of cooperation in the Indian Ocean with India. During the visit to India by President Macron in March 2018 on the occasion of the 20th anniversary of the strategic partnership between India and France, Prime Minister Modi and President Macron welcomed the Joint Strategic Vision of India-France Cooperation in the Indian Ocean Region as a key element to ensure peace, security and stability in, and bring robust economic growth and prosperity to, the region.⁴⁷ On that occasion, an agreement regarding the Exchange and Reciprocal Protection of Classified or Protected Information was also signed.

Even though other EU member states do not have the same longstanding partnership with India as France, the growing importance of the Indian Ocean in economic and political terms highlights the possibility and also the need to further explore a common EU framework for cooperation with India.

⁴⁵ European External Action Service (EEAS), “Connecting Europe and Asia - Building blocks for an EU Strategy”, Joint Communication to the European Parliament, the Council, the European Economic and Social Committee, The Committee of the Regions and the European Investment Bank, Brussels, September 19, 2018, https://eeas.europa.eu/sites/eeas/files/joint_communication_-_connecting_europe_and_asia_-_building_blocks_for_an_eu_strategy_2018-09-19.pdf.

⁴⁶ Joint Communication to the European Parliament and the Council, “Elements for an EU Strategy on India”, Brussels, November 20, 2018, https://eeas.europa.eu/sites/eeas/files/jc_elements_for_an_eu_strategy_on_india_-_final_adopted.pdf.

⁴⁷ Ministry of External Affairs of India, “India-France Joint Statement during State visit of President of France to India”, New Delhi, March 10, 2018, https://www.mea.gov.in/bilateral-documents.htm?dtl/29596/IndiaFrance_Joint_Statement_during_State_visit_of_President_of_France_to_India_March_10_2018.

CHAPTER 7

US AMBIGUITY

Under the Trump Administration, the US's engagement *vis-à-vis* sub-Saharan Africa has been ambiguous, to say the least. President Trump has never personally considered Africa a priority region: he has never travelled to sub-Saharan countries,¹ even though the First Lady visited sub-Saharan Africa in 2018² and so did Secretary of State Mike Pompeo in February 2020.³ In three years in office, President Trump has received only the presidents of Kenya and Nigeria; former Secretary of State Rex Tillerson was fired during his first official visit to Africa;⁴ in January 2020, the Trump Administration imposed visa bans on Eritrea, Nigeria, Sudan and Tanzania,⁵ besides Kyrgyzstan and Myanmar. The President's rhetoric towards the African continent could not be more controversial, as demonstrated in public speeches.⁶ Trump also proposed a large-scale pullback of American forces in Africa, mainly from West Africa,⁷ as well as significant cuts to foreign aid, although the latter have been largely rejected by

Congress, allowing the US to remain a leading donor in the continent.⁸

While Trump has met with African leaders fewer times and his public discourse and policy proposals provoked more criticism than any American president in decades, in recent months he appears to have changed his position somewhat as a result of Covid-19. In late April 2020, Trump proactively phoned the leaders of Kenya, Ethiopia, Nigeria, Rwanda and South Africa and his Administration stepped up assistance and donations to tackle the coronavirus pandemic in the continent, after passively watching China take the lead in international support, as shown by the map of foreign assistance to Covid-19 response in Africa in the concluding chapter (page 84).⁹

To identify the main trajectory of the US approach towards sub-Saharan Africa it is important to focus not just on individual episodes,

- 1 During their first mandates, President Obama and President George W. Bush visited respectively 1 country (Ghana) and 5 countries (Botswana, Nigeria, Senegal, South Africa and Uganda) in sub-Saharan Africa.
- 2 First Lady Melania Trump travelled to Egypt, Ghana, Kenya and Malawi. See: Judd Devermont, "After Melania: Next Steps for U.S. Policy toward Sub-Saharan Africa", Center for Strategic International Studies (CSIS), October 9, 2018, <https://www.csis.org/analysis/after-melania-next-steps-us-policy-toward-sub-saharan-africa>.
- 3 Secretary of State Mike Pompeo travelled to Angola, Ethiopia and Senegal, 15-19 February 2020. See: Judd Devermont, "Secretary Pompeo's 'Do No Harm' Trip to Sub-Saharan Africa", Center for Strategic International Studies (CSIS), February 21, 2020, <https://www.csis.org/analysis/secretary-pompeos-do-no-harm-trip-sub-saharan-africa>.
- 4 Rodney Muhumuza, "In Africa, Trump's firing of Tillerson a new sign of neglect", *AP News*, March 18, 2018, <https://apnews.com/4e6f5706840e420c8291c5e095e9dc45>.
- 5 Yomi Kazeem, "The Trump administration has confirmed visa bans on four African countries, including Nigeria", *QuartzAfrica*, January 31, 2020, <https://qz.com/africa/1795007/trump-issues-travel-ban-on-nigeria-eritrea-tanzania-sudan/cs>.
- 6 "Trump decries immigrants 'from shithole countries' coming to the US", *CNN*, January 12, 2018, <https://edition.cnn.com/2018/01/11/politics/immigrants-shithole-countries-trump/index.html>; "Where is 'Nambia'? President Trump 'invents' African country", *BBC News*, September 21, 2017, <https://www.bbc.com/news/world-africa-41345577>
- 7 Helene Cooper, Thomas Gibbons-Neff, Charlie Savage and Eric Schmitt, "Pentagon Eyes Africa Drawdown as First Step in Global Troop Shift", *New York Times*, December 24, 2019, <https://www.nytimes.com/2019/12/24/world/africa/esper-troops-africa-china.html>.
- 8 "US lawmakers reject budget cuts, question USAID policy", *Devex*, March 4, 2020, <https://www.devex.com/news/us-lawmakers-reject-budget-cuts-question-usaid-policy-96689>.
- 9 Meredith McGraw, "Trump courts Africa to counter coronavirus — and China", *Politico*, May 28, 2020.

but on the deeper strategic shift that has been at play in recent years.

In broader terms, in fact, sub-Saharan Africa is seen by the Trump Administration as an arena for containing the rise of China and Russia as *revisionist powers*. In other words, sub-Saharan Africa is seen as one of the chessboards where long-term strategic competition has re-emerged, and where the US presence is essential to forestall the growing influence of Beijing and Moscow. This is the cornerstone of Trump's Africa strategy as presented in December 2018. During the speech to unveil this strategy, former National Security Adviser John Bolton pointed an accusing finger at China for using 'bribes, opaque agreements, and the strategic use of debt,'¹⁰ and at Russia, for undermining peace and security through a more militaristic approach. As competition mainly revolves around the predatory economic practices pursued by revisionist powers, the first pillar of Trump's strategy is advancing US trade and commercial ties with the region. To achieve this aim, the White House launched the initiative 'Prosper Africa', whose objective is to streamline bureaucracy, expand the role of the private sector and remove logistical trade barriers.¹¹ As confirmation of the fact that the US aims to review their economic commitments on the continent in order to ensure a more effective use of resources to face global competition, the US Africa Strategy states that the United

Sub-Saharan Africa is seen as one of the chessboards where long-term strategic competition has re-emerged.

States will review aid policy, as it will 'no longer tolerate this longstanding pattern of aid without effect, assistance without accountability, and relief without reform'.¹²

Against this new strategic backdrop shaped by multipolar competition, sub-Saharan Africa is therefore no longer perceived within the old framework of the 'war on terror'. The National Security Strategy (NSS)¹³ confirms the strategic shift from counter-terrorism and irregular warfare back to great power competition.

Nonetheless, this shift does not mean that security in Africa is no longer a concern for the White House. Countering violent extremist organisations (VEOs) and trans-national criminal activities remains a key priority for the US, as clearly stated in the National Defense Strategy (NDS).¹⁴ The 2020 AFRICOM posture statement clarifies that 'in Africa, countering VEOs is a key component of global power competition as these efforts are not mutually exclusive'.¹⁵ Therefore, what this 'blank slate review' – as it is called in the AFRICOM statement – means, is that Washington's security approach will evolve in terms of operational modalities. The White House aims to review counterterrorism forces operating mainly in West Africa in order to reduce post 9/11 military engagements and refocus Pentagon priorities on confronting malign actors, namely Russia and China.¹⁶ Moreover, Trump wants to show his commitment to ending interminable wars,

10 White House, "Remarks by National Security Advisor Ambassador John R. Bolton on the The Trump Administration's New Africa Strategy", December 13, 2018, <https://www.whitehouse.gov/briefings-statements/remarks-national-security-advisor-ambassador-john-r-bolton-trump-administrations-new-africa-strategy/>.

11 USAID Administrator Mark Green's Remarks on Prosper Africa at the Corporate Council on Africa Conference, Maputo Mozambique, June 19, 2019, <https://www.usaid.gov/news-information/press-releases/jun-19-2019-mark-green-remarks-prosper-africa-corporate-council>.

12 Op. Cit., "Remarks by National Security Advisor Ambassador John R. Bolton on the The Trump Administration's New Africa Strategy."

13 White House, *National Security Strategy of the United States of America*, December 2017, <https://www.whitehouse.gov/wp-content/uploads/2017/12/NSS-Final-12-18-2017-0905.pdf>.

14 US Department of Defense, *National Defense Strategy of the United States of America*, 2018, p. 10, <https://dod.defense.gov/Portals/1/Documents/pubs/2018-National-Defense-Strategy-Summary.pdf>.

15 Statement of General Stephen J. Townsend, United States Marine Corps Commander of the United States Africa Command Before the Senate Committee on Armed Services, January 30, 2020, <https://www.africom.mil/about-the-command/2020-posture-statement-to-congress>.

Op. Cit., "Pentagon Eyes Africa Drawdown."

especially after the death of four US servicemen in an ambush in Niger in 2017.¹⁷

It is within this framework that the drawdown in the forces deployed in Africa should be interpreted, if approved by the Congress.¹⁸ In confirmation of this analysis, this drawdown will affect primarily West Africa, leaving activities largely untouched in East Africa, mainly for three reasons. Firstly, East Africa remains important for the US as it is the western boundary of the Indo-Pacific region, which is a priority strategic region since 2019,¹⁹ and the Horn is one of the most important theatres of the global power competition. Secondly, the Department of Defense believes that none of the terrorist groups operating in West Africa have demonstrated the ability and intent to attack the United States on its own soil.²⁰ Thirdly, the US believes that it is possible to benefit from French and European security commitment in the Sahel without bearing the economic and political cost of putting 'boots on the ground'. As confirmation of this approach, although Bolton praised G5 Sahel as 'a great example of the enormous potential for African joint security cooperation', the US blocked a Security Council resolution that would have given the G5 Sahel joint force a peacekeeping mandate under the UN Charter's Chapter VII, providing G5 Sahel with resources from the UN. This resolution, in fact, would have shifted much of the financial burden of supporting the G5 Sahel away from France and the EU and

The Horn is one of the most important theatres of the global power competition.

onto the UN and therefore also onto the United States.²¹ This decision is in line with the US's endeavour to reduce its contribution to UN peacekeeping operations to avoid financing 'unproductive, unsuccessful, and unaccountable'²² UN missions. Furthermore, in 2019 Trump asked NATO to contemplate taking on a formal role in sub-Saharan Africa in order to be able to continue to carry out military missions in the region while reducing costs and resources and re-direct NATO funds to those areas where the US aims to avoid direct engagement and that are strategic for European partners.

WHAT DOES IT MEAN FOR EUROPE?

Under the new strategy, the US intends to pursue counterterrorism while reducing military engagement, through a partner-centric approach which is cost-effective and reduces risk to US personnel, as it limits US engagement to operational support and foresees the use of kinetic force only when necessary. This approach is not entirely a novelty: the US has always preferred to operate in sub-Saharan Africa through allies and local proxies,²³ and even in the aftermath of 9/11, apart from Camp

17 Rukmini Callimachi, Helene Cooper, Eric Schmitt, Alan Blinder and Thomas Gibbons-Neff, "An Endless War: Why 4 U.S. Soldiers Died in a Remote African Desert", *New York Times*, February 20, 2018, <https://www.nytimes.com/interactive/2018/02/17/world/africa/niger-ambush-american-soldiers.html>.

18 Robbie Gramer, "U.S. Congress Moves to Restrain Pentagon Over Africa Drawdown Plans", *Foreign Policy*, March 4, 2020, <https://foreignpolicy.com/2020/03/04/africa-military-trump-esper-pentagon-congress-aficom-counterterrorism-sahel-great-power-competition/>

19 Department of State of the United States of America, *A Free and Open Indo-Pacific Advancing A Shared Vision*, November 4, 2019, <https://www.state.gov/wp-content/uploads/2019/11/Free-and-Open-Indo-Pacific-4Nov2019.pdf>.

20 Op. Cit., "Pentagon eyes African drawdown."

21 Matthieu Fernandez, "Bolton's risky bet in the Sahel", Atlantic Council, February 5, 2019, <https://www.atlanticcouncil.org/blogs/africasource/bolton-s-risky-bet-in-the-sahel/>.

22 Op. Cit., "Remarks by National Security Advisor Ambassador John R. Bolton on the The Trump Administration's New Africa Strategy."

23 Nicolas van de Walle, "Obama and Africa, Lots of Hope, Not to Much Change", *Foreign Affairs*, September/October 2015, <https://www.foreignaffairs.com/articles/africa/obama-and-africa>.

Lemmonier in Djibouti, its approach continued to be based on a light footprint.²⁴ With this planned drawdown, however, President Trump wants to take this approach to extremes. Concrete undesirable effects are foreseeable and may affect Europe. First of all, the withdrawal might hamper counterterrorism operations, as underscored especially by France.²⁵ Moreover, the approach could fail dramatically if African states perceive that their security priorities do not match with those of the White House, with a risk that other powers may seek to backfill the US presence.²⁶

Overall, the shift in Washington's Africa strategy to counter China and Russia raises a fundamental question for EU member states' strategic thinking, even entailing a reappraisal of the prospects for transatlantic relations in a multipolar world, and how far Europeans are willing to stretch to align to US interests, to the

Room for transatlantic cooperation in sub-Saharan Africa is becoming narrower and narrower.

detriment of their relations with other global players. It is difficult to anticipate the precise implications of the US strategic shift for European interests, but a new way of working is to be expected. In the short term, a US military drawdown can seriously jeopardise counterterrorism efforts in sub-Saharan Africa and especially in the Sahel. This can be the opportunity for Europeans to assert themselves in a region that is critical for their own security, stepping up their responsibilities. In other words, the US strategic shift ultimately begs the question of whether Europeans are ready to fill the gap left by the US and increase their commitment to African security, by strengthening their strategic autonomy. Against this backdrop, room for transatlantic cooperation in sub-Saharan Africa is becoming narrower and narrower, unless a shock intervenes or a new political leadership in Washington leads to a change of trajectory.

²⁴ Madalene Lindström, "The United States - From Counter-terrorism to Great Power Competition in Africa?", in "Foreign Military Bases and Installations in Africa", *FOI report*, August 2019.

²⁵ Karen DeYoung, "French defense minister visits Washington to press for continued U.S. role in West Africa", *Washington Post*, January 2019, 2020, https://www.washingtonpost.com/national-security/french-defense-minister-visits-washington-to-press-for-continued-us-role-in-west-africa/2020/01/28/39905e38-41e5-11ea-b5fc-eefa848cde99_story.html.

²⁶ Ryan Browne, "US to reduce number of troops in Africa", *CNN Politics*, November 15, 2018, <https://edition.cnn.com/2018/11/15/politics/us-reduce-troops-africa/index.html>.

CHAPTER 8

MIDDLE EASTERN PROXIES

To fully understand Middle Eastern countries' strategies towards sub-Saharan Africa, it is essential to frame them within the wider context of rivalry between Muslim countries: on the one hand Qatar and Turkey, and on the other hand the United Arab Emirates (UAE) and Saudi Arabia, which are both allied with Egypt. This longstanding rivalry was exacerbated in 2011 by the Arab Spring, when Turkey and Qatar openly supported the Muslim Brotherhood governments in Egypt, Libya and Tunisia. Afterwards, the onset of the civil war in Yemen, which saw the engagement of Iran in supporting Houthi rebels, and the 2017 crisis within the Gulf Cooperation Council (GCC), which led to Qatar's diplomatic isolation, accelerated this polarisation even more. Against this backdrop, sub-Saharan Africa, and especially the Horn of Africa, have become the battleground of a proxy economic, political and religious competition, with important consequences for Europe.

TURKEY

Over the last few years, Turkey has expanded its diplomatic footprint in sub-Saharan Africa: in 2009 there were only 7 embassies in sub-Saharan countries, in 2020 there are already 37; the number of diplomatic missions of sub-Saharan countries in Turkey is now 32,

while it was merely around 10 in 2014. Turkey has also embassies accredited to various regional organisations¹ and has been a strategic partner of the AU since 2008 and in 2013 became the 26th non-regional member of the African Development Bank. Turkish Airlines has defined Africa as a priority² and has become a major air carrier providing flights to 42 destinations in 34 sub-Saharan countries – including Modagishu.

Turkey started attaching greater interest to sub-Saharan Africa in 1998, when it adopted the 'Opening to Africa Policy'. After having lost its strategic relevance in the fight against the Soviet bloc and following the delays in EU accession, Turkey perceived the need for a strategic rethinking of its foreign policy priorities. It is within this framework that it started looking at sub-Saharan Africa as a region where it could expand its presence and find new partners for an autonomous, ambitious and non-Western aligned foreign policy. The Africa Policy led to the opening of new embassies, the development of Turkey-Africa relations through an increase in high-level visits, and the improvement of cultural cooperation.³ The coming to power of Recep Tayyip Erdogan and of his Justice and Development Party (AKP) in 2002 gave a new boost to Turkish engagement in the region. Erdogan declared 2005 the 'year of Africa' and in the same year visited Ethiopia and South Africa – becoming the first Turkish

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- 1 Turkey has embassies accredited to the Intergovernmental Authority on Development (IGAD), the Economic Community of West African States (ECOWAS), the East African Community (EAC), Common Market for Eastern and Southern Africa (COMESA), and the Economic Community of Central African States (ECCAS).
 - 2 "Turkish Airlines Prioritizes Expansion in Africa", *Anadolu Agency*, April 30, 2019, <https://www.aa.com.tr/en/africa/turkish-airlines-prioritizes-expansion-in-africa/1466079>.
 - 3 Mehmet Özkan and Birol Akgün, "Turkey's Opening to Africa", *The Journal of Modern African Studies*, vol. 48, no. 4 (December 2010), pp. 525-46.

prime minister to travel to a country south of the Equator. In 2008, Ankara organised the first ‘Turkey–Africa Cooperation Summit’ and in 2014 the second edition was held in Malabo. Erdogan’s Africa Policy was framed in the broader conceptual framework of the Strategic Depth Doctrine, according to which Turkey is entitled to play an important geopolitical role by virtue of its geostrategic location which allows it to project itself globally.⁴ The fact that Turkey considers itself an Afro–Eurasian state gives an idea of the long-term strategic relevance of the African sub-continent in Ankara’s foreign policy.⁵

Analysing the underlying reasons for Turkey’s growing engagement in sub-Saharan Africa, three main factors can be identified. First, from a strategic point of view, Turkey’s approach towards this region is part of a wider strategy which aims to project influence through a multidimensional and proactive diplomacy, as demonstrated by its engagement in other relevant scenarios, such as the wars in Libya, Yemen or Syria. Through a foreign policy that might be described as *tentacular*, Turkey is able to play a decisive role on several geopolitical chessboards – and sub-Saharan Africa is one of these – so as to gain a strong political leverage that it can use at its convenience. Second, economically speaking, sub-Saharan countries represent a large market for Turkish goods and a strong investment opportunity for Turkish firms.⁶ Third, greater Turkish interest towards sub-Saharan Africa can be explained as reflecting a commitment to promoting its version of political Islam, supporting the Muslim Brotherhood together with Qatar and containing the

increasing influence of Saudi Arabia and the UAE in the region.

The Turkish approach is characterised by some aspects which make it unique in comparison with both EU member states and other global players, such as the US, China or Japan.

The first attribute is Turkish soft power, which mainly hinges upon two elements: history and religion. With regard to the former, modern-day Turkey can portray itself as the heir of the Ottoman Empire and through this ‘Neo-Ottomanism’ stoke up anti-Western rhetoric, stressing the role played by the Sublime Porte which, in Ankara’s vision, prevented the penetration of Western colonialism without imposing its own culture on local populations.⁷ When it comes to the latter element, Turkey is linked with sub-Saharan countries by Sunni Islam, as Turkey is a member of the Organisation of Islamic Cooperation (OIC), which includes 22 sub-Saharan countries. This connection has a strategic dimension which is strengthened both at state and people-to-people level with a twofold aim: on the one hand, to develop stronger cooperation with sub-Saharan Muslim countries based on religious solidarity, and on the other hand to counteract the spread of Saudi Wahhabism. The promotion of Islam is entrusted to the Directorate of Religious Affairs, the Diyanet, whose international mission has been extended by the AKP. Among its tasks, the Diyanet organises summits, builds new mosques, as for instance the one inaugurated in Djibouti in November 2019,⁸ educates preachers, publishes books and translates the Koran into local languages.⁹ Against this backdrop, a key role is given to the promotion of

4 Angel Rabasa and F. Stephen Larrabee, *The Rise of Political Islam in Turkey* (Santa Monica: Rand Corporation, 2008), pp. 75–76.

5 Ministry of Foreign Affairs of the Republic of Turkey, *Turkey–Africa Relations*, <http://www.mfa.gov.tr/turkey-africa-relations.en.mfa>.

6 Turkey has Business Councils in 19 sub-Saharan countries and a Free Trade Agreement (FTA) with Mauritius and is currently in FTA negotiations with the Democratic Republic of Congo, Djibouti, Cameroon, Chad and Seychelles and has launched initiatives to start negotiations with South Africa. See: Ministry of Trade of the Republic of Turkey, *Free Trade Agreements*, September 4, 2018, <https://www.trade.gov.tr/free-trade-agreements>.

7 Op. Cit., *Turkey–Africa Relations*.

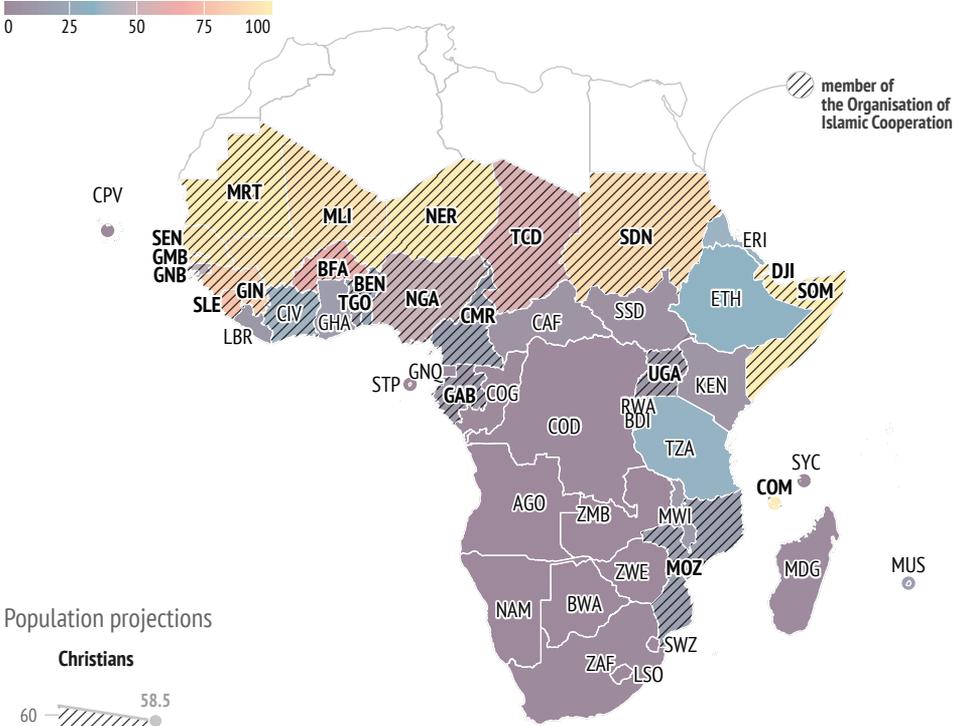
8 Dilara Hamit, “Turkey inaugurates the largest mosque in Djibouti”, *Anadolu Agency*, November 29, 2019, <https://www.aa.com.tr/en/africa/turkey-inaugurates-largest-mosque-in-djibouti/1659573>.

9 Gonul Tol, “Turkey’s Bid for Religious Leadership, How the AKP Uses Islamic Soft Power”, *Foreign Affairs*, January 10, 2019, <https://www.foreignaffairs.com/articles/turkey/2019-01-10/turkeys-bid-religious-leadership>.

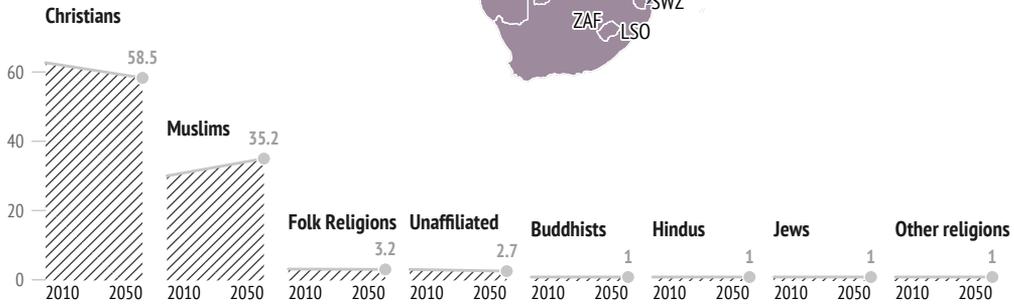
Muslim population

Muslims in sub-Saharan Africa

Muslims as percentage of total population, 2010



Population projections



Data: Pew Research Center, 2020; Natural Earth, 2020

Turkish-style religious education. After the closure of Gülen schools in sub-Saharan Africa in the aftermath of the 2016 coup attempt,¹⁰ the promotion of Turkish religious education was entrusted to various Islamic organisations, such as the Hudayi Foundation and Suleymancilar.

Finally, Turkey’s military engagement builds on ties with two regional allies, Sudan and Somalia. In 2017, Turkey and Sudan signed a \$650 million cooperation package which included a 99-year concession lease to redevelop the island of Suakin,¹¹ raising many concerns in Riyadh and Abu Dhabi as this deal could pave the way for the installation of a military base. The agreements also included the stationing of

¹⁰ Asya Akca, “Neo-Ottomanism: Turkey’s Foreign Policy Approach to Africa”, Center for Strategic and International Studies (CSIS), April 8, 2019, <https://www.csis.org/neo-ottomanism-turkeys-foreign-policy-approach-africa>.

¹¹ Op. Cit., “The Foreign Military Presence in the Horn of Africa Region.”

Turkish forces at Port Sudan, to train Sudanese forces in counterterrorism activities.¹² The other pillar of Turkish strategy in the Horn is Somalia, where in 2017 Turkey opened a training facility for Somali military troops. Even though only 200 Turkish military personnel are reported to be deployed, this training facility clearly shows a potential for Turkey's hard power to be deployed in the region.

GULF STATES

Saudi Arabia, Qatar and the UAE have started to become more engaged in sub-Saharan Africa in order to ensure their economic and security interests and reduce overdependence on oil revenues. At the same time, as for Turkey, sub-Saharan Africa represents much more than an arena of economic opportunity for them. It is the chessboard on which two other geopolitical matches are played out: one to gain the leadership within the Muslim world – exporting their version of political Islam and containing Iranian influence – and another to prove their rising status on the international stage. As for Turkey, Sunni Islam is a door opener for GCC countries' engagement in the African sub-continent, especially for Saudi Arabia. Capitalising on the fact that many Saudi charities make donations to African countries, and on the presence on its soil of the Holy Cities of Islam – Mecca and Medina – Saudi Arabia can

play the role of leading country in promoting Wahhabi Islam in sub-Saharan countries.¹³ Moreover, sub-Saharan Africa is also important for the Gulf States to achieve food security, as it contains 60% of the world's total uncultivated arable lands and the Gulf States' internal demand for food cannot be entirely satisfied domestically. It is with this purpose in mind that both Saudi Arabia and Qatar have been actively engaged in land acquisition in sub-Saharan Africa.¹⁴

In terms of geographic priorities, GCC countries' engagement follows two patterns. The first consists in securing strategic interests in the Horn of Africa, which has always been a priority region for GCC countries; the second pattern is related to Gulf states' increasing engagement in Western Africa. Even though the Sahel is not directly linked with their own security priorities, Saudi Arabia and the UAE have recalibrated their approach towards the region and in 2017 pledged \$100 million and \$30 million respectively to G5 Sahel.¹⁵ The aim is clear: to bolster their international reputation as serious partners in the fight against terrorism. With regard to Qatar, Doha's approach towards Western Africa is different, as it is mainly driven by the need to re-establish its position after the diplomatic earthquake provoked by the 2017 GCC crisis, when Mauritania, Gabon, Chad,¹⁶ Senegal¹⁷ and Niger sided with Saudi Arabia and the UAE and recalled their ambassadors from Doha. To express his gratitude to those countries that had remained neutral

12 Zach Vertin, "Red Sea Rivalries: the Gulf, the Horn, and the new Geopolitics of the Red Sea", Brookings Doha Center, August 2019, <https://www.brookings.edu/wp-content/uploads/2019/06/Red-Sea-Rivalries-The-Gulf-The-Horn-and-the-New-Geopolitics-of-the-Red-Sea-1.pdf>.

13 Benjamin Auge, "Saudi Arabia's Policy in Africa: Vectors and Objectives", *L'Afrique en questions*, no. 52, Institut français des relations internationales (IFRI), February 6, 2020, <https://www.ifri.org/en/publications/editoriaux-de-lifri/lafrrique-questions/saudi-arabias-policy-africa-vectors-and-0>.

14 Will Todman, "The Gulf Scramble for Africa, GCC States' Foreign Policy Laboratory", Center for Strategic and International Studies (CSIS), November 2018, https://csis-prod.s3.amazonaws.com/s3fs-public/publication/181120_Todman_Africa_layout_v3_0.pdf?xgwtwB2_gU7.S58Z2zPX7DXb_5kw.gmoc.

15 "S. Arabia pledges \$100 million and UAE \$30 million for Sahel anti-terror force", *France 24*, December 13, 2017, <https://www.france24.com/en/20171213-africa-counter-terrorism-sahel-saudi-arabia-pledges-100-million-uae-g5-macron>. It is interesting to note that due to a diplomatic dispute with France, Saudi Arabia's funds have not been deposited yet. See: "G5 Sahel: pourquoi les millions de l'Arabie saoudite sont restés bloqués", *Jeune Afrique*, March 29, 2020, <https://www.jeuneafrique.com/916784/politique/g5-sahel-pourquoi-lesmillions-de-larabie-saoudite-sont-restes-bloques/>.

16 Qatar-Chad diplomatic relations were restored in 2018, when Doha helped N'Djamena renegotiate its debt with the commodity firm Glencore in which the Qatar Investment Authority is one of the main shareholders. See: Benjamin Auge, "Etranglé économiquement, le Tchad a opéré un revirement complet vis-à-vis du Qatar", *Le Monde - Afrique*, May 3, 2018, https://www.lemonde.fr/afrique/article/2018/05/03/etrangle-economiquement-le-tchad-a-opere-un-revirement-complet-vis-a-vis-du-qatar_5293853_3212.html.

17 Senegal re-established diplomatic relations with Qatar only two months after, in August 2017.

and to cement Qatari presence in the region, in December 2017 Emir Tamim bin Hamad Al Thani undertook his first trip to the region, visiting Burkina Faso, Côte d'Ivoire, Ghana, Guinea, Mali and Senegal, and signing several cooperation agreements in the field of health, education and development.¹⁸

Gulf countries have also sought to enhance their military presence in the Horn through a network of alliances, which nonetheless has proved to be very fluid and fragile. In particular, the UAE's longstanding involvement in the Horn accelerated in 2015, when the onset of the Yemeni war raised the need to quickly establish bases along the Red Sea coast to support military operations in Yemen.¹⁹ Initially, the UAE tilted towards Djibouti but the severance of diplomatic relations with the small Horn state obliged Abu Dhabi to reorient towards Eritrea, which suddenly acquired an unexpected prominence in the Saudi-Emirati regional security architecture. In 2015, the UAE started using Assab as the base of military operations against Houthi forces in Yemen. The UAE has also been actively present in Somaliland: in 2016, DP World obtained the concession of Berbera port, paving the way for the construction of a military base close to Berbera airport. However, it has been recently reported that the UAE has halted the construction of this military base.²⁰

WHAT DOES IT MEAN FOR EUROPE?

The integration of the Horn of Africa into the regional dynamics of the Gulf creates a new

broader geostrategic space which stretches from the Red Sea to the Strait of Hormuz including the north-eastern Indian Ocean. While in the short term, Middle Eastern countries promoted stability in this region, as demonstrated by Saudi Arabia and the UAE's role as mediators in the Ethiopia-Eritrea peace deal or Qatar's deployment of peacekeepers at the border with Eritrea and Djibouti from 2010-2017, the longer term outlook may be different. Middle Eastern countries' national interests are likely to prevail and clash in the long run, exacerbating regional fragmentation and divisions, worsening human security, and deepening political instability with negative effects on mobility. The case of Somalia where Turkey and the UAE support two different factions, resulting in increasing internal polarisation, is emblematic. In this zero-sum game, the harmful mix of economic pressure and hard power could leave this region without a clear and common agenda and at the mercy of rapid shifts in the balance of power. The militarisation of the Bab el-Mandeb Strait by the Gulf States and Turkey, alongside the competition of China and the US, risks jeopardising peace and stability efforts in the Horn. Rivalries among Middle Eastern countries underpinned by the factors described above and exacerbated by the Yemeni conflict, could trigger a fierce military confrontation, which could create a real geopolitical and economic shock, such as a blockade, which neither EU member states nor the Horn states would be able to deal with. Against this backdrop, it is crucial for the EU and its member states to uphold their security commitment and strengthen bilateral relations, but also to actively support multilateral organisations such as the Intergovernmental Authority on Development (IGAD), in order to reinforce institutional capacities in early warning, preventive diplomacy and mediation.

18 "Qatar's Emir Grants \$100 Million in Africa Tour", *Alwaght*, December 25, 2017, [http://alwaght.com/en/News/120217/Qatar's-Emir-Grants-\\$100-Million-in-Africa-Tour](http://alwaght.com/en/News/120217/Qatar's-Emir-Grants-$100-Million-in-Africa-Tour).

19 International Crisis Group, "The United Arab Emirates in the Horn of Africa", *Middle East Briefing*, no. 65, November 6, 2018, <https://www.crisisgroup.org/middle-east-north-africa/gulf-and-arabian-peninsula/united-arab-emirates/b65-united-arab-emirates-horn-africa>.

20 "UAE cancels construction of military base in Somaliland", *Garowe Online*, March 4, 2020, <https://www.garoweonline.com/en/news/somaliland/uae-cancels-construction-of-military-base-in-somaliland>.

CHAPTER 9

RUSSIA'S FORAYS

Russia is one of the fastest growing trade partners for sub-Saharan Africa and is mounting a remarkable comeback through a 'low costs, high returns and visibility' approach.¹ Since the late 2010s, after two decades of disengagement, sub-Saharan Africa has remerged in Russian political discourse and trade and diplomatic traffic have picked up. The Wagner Group – a military enterprise connected to the Russian state – has also expanded its radius of action in Africa.²

Russia's strategic interests in sub-Saharan Africa are driven by several motivations and objectives. First of all, the Soviet Union's engagement in sub-Saharan Africa had left a bitter aftertaste in Moscow: the Soviets experienced ephemeral geopolitical gains, while financial costs kept

Two decades on, Russian ruling elites once again view the African continent as a geopolitical and business opportunity.

escalating. Indeed, almost all that remained in the wake of the rapid geopolitical retreat of the 1990s was nearly \$17 billion worth of debt that sub-Saharan nations owed to post-Soviet

Russia.³ This disappointment gradually faded away over time and now, two decades on, Russian ruling elites once again view the African continent as a geopolitical and business opportunity.⁴ For instance, oil giant Rosneft's quest for business deals in Angola and Mozambique, countries in which its influential CEO Igor Sechin served as a military translator in 1980s, heralds Russia's shift towards

a more extractive approach.⁵ Thus, if earlier engagements led to an overall economic loss, Moscow now aspires to 'keep investments low but returns high.'⁶

- 1 Giovanni Faleg and Stanislav Secieru, "Russia's forays into sub-Saharan Africa: do you want to be my friend again?", *EUISS Brief* no. 6, European Union Institute for Security Studies (EUISS), March 31, 2020.
- 2 Kimberly Marten, "Into Africa: Prigozhin, Wagner, and the Russian Military", *PONARS Eurasia Policy Memo*, no. 561, January 2019, http://www.ponarseurasia.org/sites/default/files/policy-memos-pdf/Pepm561_Marten_Jan2019_0.pdf.
- 3 "UNCTAD Analyses the Debt of sub-Saharan African Countries to non-OECD Official Creditors", United Nations Conference on Trade and Development, November 7, 1996, <https://unctad.org/en/pages/PressReleaseArchive.aspx?ReferenceDocId=3737>.
- 4 интервью информационному агентству ТАСС [Interview given by Vladimir Putin interview to Russian state information agency TASS ahead of RU-Africa Summit in Sochi], *Kremlin.ru*, October 21, 2019, <http://kremlin.ru/events/president/news/61858>.
- 5 "Rosneft Eyes Africa, Former Soviet Posting of CEO", *Reuters*, April 23, 2014, <https://www.reuters.com/article/rosneft-oil-co-angola-oil/update-1-rosneft-eyes-africa-former-soviet-posting-of-ceo-idUSL6N0NF33U20140423>.
- 6 Russian expert remarks, closed-door event, Moscow, 2019.

Economically, it aims to gain access to natural resources (oil, gas, diamonds etc.) while boosting exports of agro products (grain), fertilisers, arms, and nuclear, digital and space technologies. Militarily, Russia frames itself as an anti-jihadist force striving to establish and deepen security ties with African armies and secure access to infrastructure to ensure the resupply and maintenance of its navy. Diplomatically, Russia seeks votes in support of its positions in the UN or other political gestures that uphold Moscow's diplomatic posture internationally.⁷

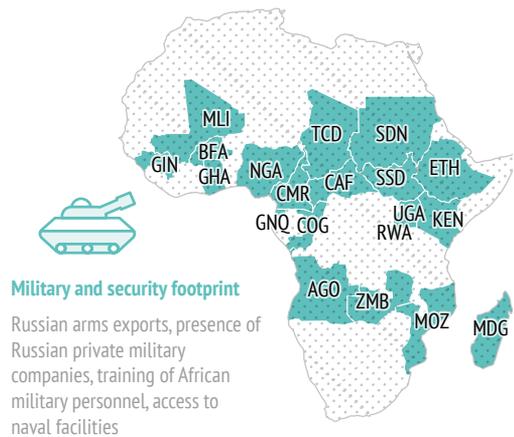
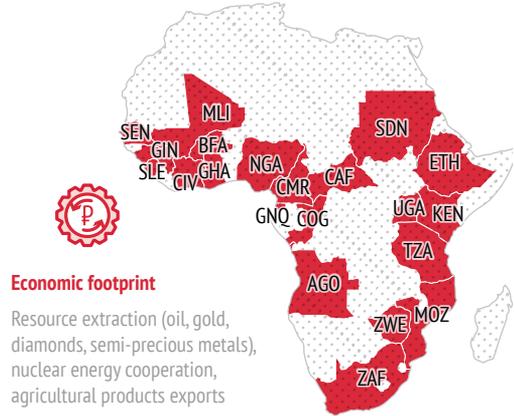
The conviction that policies in sub-Saharan Africa can this time bring about quantifiable dividends is interlinked with Russia's great power instincts and its preoccupation with securing recognition of its global status. From the Russian point of view, sub-Saharan Africa is another battleground where established and rising powers clash for resources, market shares and political influence.⁸ Moreover, from 2010 onwards Russia has not derived its great power status exclusively from claims of pre-eminence in its immediate neighbourhood; its status is increasingly based on the ability to conduct a global foreign policy. In this regard, one Russian expert recently underscored that 'Russia's policy in Africa shows that our geostrategic interests are wider than is thought.'⁹

Last but not least, a string of military, political or economic successes in the Middle East and North Africa (MENA) have often paved the way for Russia's forays into sub-Saharan politics. First, after boosting grain exports to Egypt since

Gaining a foothold

Russian presence in sub-Saharan Africa, 2010-2020

The term 'presence' is based on a set of indicators developed by the EUISS corresponding to specific categories (economic, military, strategic communication).



Data: Natural Earth, 2020; 88 unique public sources were consulted when preparing this map. Although these cannot be listed individually due to space limitations, the five most relied-upon sources were SIPRI, TASS, RIA, MID.ru and Proekt.media.

7 Olga Kulkova, "Povorot Rossii k Afrike: Kakovy Perspektivy?" [Russia's turn to Africa: what perspectives?], *Valdai Discussion Club*, March 5, 2018, http://ru.valdaiclub.com/events/posts/articles/lukomorya-bolshe-net/?sphrase_id=38196.

8 Vadim Balytnikov et al., "Vozrashenie Rossii v Afriku: Strategia i Perspektivy [Russia's Return to Africa: Strategy and Perspectives]", *Valdai Club*, October 2019, <http://ru.valdaiclub.com/files/30230/>.

9 Russian expert remarks during the closed-door discussion, Moscow, 2019.

the mid-2000s, Moscow gained and expanded its share in Sudan's wheat market (from 5% to 55%) throughout the 2010s.¹⁰ Second, Russia capitalised on its intervention in Syria to acquire new clients for its arms in sub-Saharan Africa: its share in arms exports to the region rose from 19% to 28% between 2012 and 2018.¹¹ Third, Moscow exploited the renewed Russia-Egypt partnership to organise the first ever Russia-Africa Summit in 2019, co-chaired by President Putin and President Sisi and held in Sochi. There is a high degree of historical continuity here: North Africa traditionally played a more important role in Russian and Soviet foreign policy¹² and accomplishments there created the pre-conditions for engagement with southern Africa.

On that account, Russia's strategic approach builds on the awareness of its quasi-underdog status on the continent and the recognition that it lacks the resources of the Soviet Union era.¹³

Furthermore, during the time Russia was largely absent from sub-Saharan Africa, more powerful external players filled the vacuum and Soviet-trained ruling elites gradually gave way to a new wave of leaders.¹⁴ Now, because Russia came late to the contest for the future of Africa, it faces an uphill struggle to re-establish a position even close to what it held previously.

These limitations inform and shape Russia's current *modus operandi*. The Kremlin's rule-book in sub-Saharan Africa therefore prescribes capitalising on existing advantages,

a renewed outreach to African elites, targeting sectoral niches in which Russia can be politically and economically competitive, the swift exploitation of new regional openings, and (where possible) cooperation with like-minded great powers already entrenched in the continent.

The Kremlin regards strategic communications (StratCom) as an essential component to be fully exploited and create favourable conditions for Russia's resurgence. Over the last few years, the list of sub-Saharan countries in which Russian spin doctors and/or trolls have operated has rapidly expanded. Although presented as the initiative of private enterprises, this 'electoral assistance' is usually deployed in parallel with cooperation in the security field, Russia's diplomatic protection in international organisations and/or in some cases, loans. In turn, this helps create entry points and gain the trust of local ruling elites during times when they feel most vulnerable

(e.g. elections, mass protests). States providing assistance to ward off or inhibit democratic changes and ensuring authoritarian leaders' survival have been labelled 'Black Knights'.¹⁵ Russia has long supported such actors in the post-Soviet region, but it has now expanded this model to sub-Saharan Africa. Russia's 'Black Knight' posture fits well with its extractive approach as its

protection does not come free of charge. When shielding local rulers from domestic discontent and international pressure, the Russian government and its related companies often seek lucrative deals in return.¹⁶ Protection is also traded

Russia's 'Black Knight' posture fits well with its extractive approach as its protection does not come free of charge.

10 The Observatory of Economic Complexity (OEC), "Where Does Sudan Import Wheat From? (2010)", https://oec.world/en/visualize/tree_map/hs92/import/sdn/show/1001/2010/; OEC, "Where does Sudan import wheat from? (2017)", https://oec.world/en/visualize/tree_map/hs92/import/sdn/show/1001/2017/.

11 Aude Fleurant, Pieter D. Wezeman, Siemon T. Wezeman and Nan Tian, "Trends in International Arms Transfers 2016", *SIPRI Fact Sheet*, Stockholm International Peace Research Institute, February 2017, <https://www.sipri.org/sites/default/files/Trends-in-international-arms-transfers-2016.pdf>.

12 Dan C. Heldman, *The USSR and Africa: Foreign Policy under Khrushchev* (Praeger Publishers: New York, 1981), p.109.

13 Op. Cit, "Povorot Rossii k Afrike: Kakovy Perspektivy?"

14 Ibid.

15 Steven Levitsky and Lucan A. Way, *Competitive Authoritarianism: Hybrid Regimes after the Cold War* (Cambridge University Press: New York, 2010).

16 Theo Neethling, "How Russia is growing its strategic influence in Africa", *The Conversation*, February 6, 2019, <http://theconversation.com/how-russia-is-growing-its-strategic-influence-in-africa-110930>.

for various diplomatic gains: support in the UN for Russia's position on Syria, an alignment with Moscow on restrictive cyber norms, or the withdrawal of the recognition of Kosovo, for instance.

WHAT DOES IT MEAN FOR EUROPE?

In the short term, Russia's operations and deals in sub-Saharan Africa will not constitute a direct threat to Europe, but may undermine EU interests, external action and normative power in specific areas. For instance, Russian arms sales have had an impact on the mandate and effectiveness of the EU Training Mission in the Central African Republic (EUTM-RCA) in matters related to security sector reform (SSR) and the implementation of the integrated approach to support the transition process.¹⁷ In post-Bashir Sudan, Russian support to the

Transitional Military Council and efforts to delegitimise the Sudanese opposition¹⁸ are at odds with the EU's approach to support a peaceful transition, civilian rule and condemn any form of violence and human rights abuse.¹⁹

In the long term, should Russia sustain and manage to scale up its influence, the implications for Europe could incrementally grow more negative, expanding from single countries to the continental level, particularly if Russian soft power and disinformation campaigns help fuel anti-Western sentiment or hamper democratisation and good governance across sub-Saharan Africa. While it is unlikely that Russia will develop a continental grand strategy, the presence of a wide Russian-supported disinformation network or a patchwork expansion of private military companies would clash with EU objectives and values. Yet whatever the exact future scenario, it is clear that Russia is there to stay in sub-Saharan Africa, along with the other global powers.²⁰

¹⁷ On EUTM-RCA, see: https://eeas.europa.eu/sites/eeas/files/20190919_mission_factsheet_eutm_rca.pdf.

¹⁸ Samuel Ramani, "Moscow's Hand in Sudan's Future", Carnegie Endowment for International Peace, July 11, 2019, <https://carnegieendowment.org/sada/79488>.

¹⁹ Council of the EU, "Sudan: Foreign Affairs Council statement", Brussels, June 17, 2019: <https://www.consilium.europa.eu/en/press/press-releases/2019/06/17/sudan-foreign-affairs-council-statement/>.

²⁰ Alex Vines, "Global Engagement With Africa Continued to Surge in 2018", Chatham House, January 8, 2019, <https://www.chathamhouse.org/expert/comment/global-engagement-africa-continued-surge-2018>.

CONCLUSIONS

COMMON DENOMINATORS, GEOPOLITICAL HAZARDS AND POST-COVID-19 SCENARIOS

There is a broad consensus between the EU and its member states on how to approach their relationships with sub-Saharan Africa. This is much less the case with global powers, with few exceptions. By looking at which strategic trajectory those actors take, it is possible to gauge the future course of multipolarity in Africa and identify entry points for international cooperation, while of course bearing in mind that internal African dynamics exert their own impact.¹

EUROPEAN STRATEGIES: COMMON DENOMINATORS AND FAULTLINES

Beginning with Europe, there are six main common denominators among EU member states. First, they all acknowledge the importance of fostering inclusive economic growth as a key element of a renewed partnership with Africa, especially in the light of the stronger continental economic integration underpinned

by the AfCFTA. This focuses heavily on private sector development, job creation and investment promotion, which feature as core elements in nearly all strategic documents, and marks a shift from a donor-recipient to a partnership-of-equals approach.

Second, member states pay special attention to achieving peace and security in the continent, and particularly in the Sahel, a region that is considered as a strategic priority as 'Europe's African border'. Here are concentrated most of the stabilisation efforts and attempts to apply an integrated approach across the humanitarian, development and peace nexus. In recent years, however, a growing attention to conflict prevention has emerged, and we may expect this to intensify as violent extremist groups expand beyond the traditional hotspots, also given the high costs and limited impact of counter-terrorism and countering violent extremism approaches.

Third, member states share a strategic narrative emphasising governance, rule of law, protection of human rights, and the whole set of normative conditions that underpin the EU's foreign policy (and by extension that of its national constituents), through the definition and promotion of self-declared norms and values.

¹ As mentioned in the introduction, an analysis of African countries' strategies and relations with Europe and other global powers would have gone beyond the limited scope of this *Chaillot Paper*.

Fourth, commitment to a rule-based, multi-lateral order remains firm for most member states, although it goes hand-in-hand with the growing awareness that realism in the partnership with African countries is essential to face multipolar competition.

Fifth, member states pay increasing attention to sustainability, whether this takes the form of the growing importance of addressing climate change, facilitating the transition to a green economy, focusing on gender equality, as well as on governance and effective service delivery.

Finally, connectivity and digitalisation are innovative sectors that will define the prospects for growth in Africa in the next decade, hence capturing member states' strategic attention, particularly in terms of the business opportunities that can arise in these areas.

In terms of geographic presence, EU member states concentrate most of their engagements in West Africa and the Sahel, and in the Horn of Africa. Looking ahead, a growing focus on the broader Eastern Africa/Indian Ocean area can be expected. South Africa and Ethiopia will remain, respectively, the main economic and political hubs and 'landing points' for member states in the continent. In West Africa, Ghana is emerging as a key commercial hub, competing with Nigeria.

Areas of consensus apart, where can we expect EU member states to disagree? Which areas are likely to generate conflict or competition among member states? Although they speak a similar strategic language, the strategic interests of member states are obviously not the same. The relatively good news is that most of these faultlines are predictable and long-standing, corresponding to areas in which European capitals have traditionally clashed, such as competing energy interests, the struggle to maintain political

influence in specific sub-regions or countries, migration governance or lack of coordination in military interventions. There are, however, new possible faultlines on the horizon.

Common denominators

In EU member states' strategies



First, the growing strategic importance of Africa for many EU member states can amplify intra-EU competition. A case in point is West Africa, where France, which has traditionally maintained a strong presence and influence, will be confronted with a higher number of European states engaged in the region, creating some opportunities

for burden sharing (for instance, support to military operations or development projects, as demonstrated by the establishment of the new Takuba task force) but also problems

The growing strategic importance of Africa for many EU member states can amplify intra-EU competition.

related to coordination, and harmonisation of individual nations' interests and priorities.

Another potential faultline is the potential fragmentation of national trade and investment plans, which can lead to a 'mini-scramble' within the EU if uncoordinated initiatives launched by European capitals, such as high-level summits or economic gatherings, undermine collective action. Some EU member states may also feel 'challenged' by others in specific niche areas, such as education and cultural diplomacy.

Finally, in terms of narratives, member states have dissimilar historical trajectories, which results in diverging approaches towards the African sub-continent: while those with a colonialist past are sometimes still struggling to shed negative associations with the colonial period, other countries, namely those of the post-Soviet space, can share with sub-Saharan states their experience in the implementation of economic and political reforms during the transitional period.

While we may not see EU member states pushing competition to the extreme, for instance by fighting 'trade wars' among each other, projecting a fragmented image and squabbling for contracts or political influence could undermine the EU's credibility and effectiveness in the continent *vis-à-vis* other global actors. Intra-EU faultlines could create a 'lose-lose' situation, resulting in Europe as a whole being weakened, with no significant gain for national capitals. Because of growing multipolar competition, African countries can in fact pick and choose their best allies and most profitable deals. In other words, the EU risks losing important ground in the continent, or exposing its flank to manipulation by competing external powers, if its member states' strategies do not result in a coherent and coordinated approach.

Because of growing multipolar competition, African countries can in fact pick and choose their best allies and most profitable deals.

GLOBAL STRATEGIES: GEOPOLITICAL HAZARDS AND ENTRY POINTS FOR COOPERATION

The volume has shown that there is significant variation in global powers' strategies towards sub-Saharan Africa, and only limited synergies with European ones. There are, in particular, six types of geopolitical hazards, areas where EU and its member states are likely to face adverse global power competition and influences. This is also where the language of power becomes different, where visions of Africa's future become conflicting and the main risks and challenges for a sustainable and mutually beneficial partnership between Africa and Europe originate. Despite those hazards, there are nonetheless entry points for multilateral cooperation.

If exploited, those openings could allow the EU to mitigate risks and maximise opportunities arising from the new African geopolitics.

The first hazard concerns the battle of strategic narratives. In a multipolar world, we can expect sub-Saharan Africa, but also North Africa, to become frontlines of

this conflict. Here, attempts to discredit the EU and fuel anti-Western rhetoric will intensify and assume various forms, in an effort to make geopolitical gains or widen the gap between Europe and Africa. For instance, should Russia sustain and expand its influence in sub-Saharan Africa, this could have adverse implications for Europe, especially if Russian soft power and disinformation campaigns lead to a growth in anti-European sentiment. Similarly, Turkey's Neo-Ottomanism and soft power emphasises an anti-Western rhetoric, reinforced by a history of opposition to colonialism and by the role of religious solidarity, whereby Islam can cement links between Turkey and several

sub-Saharan countries. Finally, Chinese penetration of the continent, through loans and credits without the strings of conditionality, discredits the European way of promoting rule of law and good governance in Africa. Furthermore, China is aggressively projecting the image of a reliable and honest partner, which, despite the risks associated with the debt trap or the growing militarisation of the Chinese presence in Africa, can push African countries further away from Europe. In the new African geopolitics, narratives will play an important role in shaping perceptions and affecting key policy decisions. In the struggle for influence, the EU's strategic position in Africa will be put under pressure by competing narratives, pushed by state, as well as non-state actors, such as terrorist and violent extremist groups.

The second type of hazard is related to the support to transition processes and regime change. In its pursuit of a foreign policy based on the promotion of democracy, rule of law, fair and transparent elections and peaceful transitions, the EU will be increasingly confronted with other actors who, depending on their interests, may support authoritarian leaders, fraudulent elections and violent state repression, as well as turn a blind eye to political violence and human rights violations. For instance, in post-Bashir Sudan, Russian support to the Transitional Military Council and active delegitimisation of the Sudanese opposition and support to the Transitional Military Council² run counter to the EU's efforts to support a peaceful transition to civilian rule and condemn any form of violence and human rights abuse.³ In the case of Somalia, Turkey and the UAE's support to two different factions is detrimental to stability insofar as it fuels internal polarisation. Disagreement among global powers with regard to

In the new African geopolitics, narratives will play an important role in shaping perceptions and affecting key policy decisions.

desired outcomes of transitions may increase the likelihood of proxy wars or exacerbate tensions among local actors, which could make it difficult if not impossible to identify pathways towards democracy, undermining one of the key elements of the EU's normative power. Nevertheless, in this regard, the EU can showcase a strong determination and internal cohesion, as concerns about Russia's intrusion in countries undergoing

political transition are shared by all member states, especially by those belonging to the post-Soviet space.

Third, security, defence and the arms trade are areas where the EU's interests and approach will be opposed to those of other global powers, in two ways. One, sub-Saharan Africa is seeing a growing presence of foreign military forces. In particular, the Horn of Africa has experienced a steady build-up of foreign military forces on land, at sea and in the air since the early 2000s, now operating alongside US and European ones. While there has been little direct hostility between the different foreign military forces in the Horn so far, geopolitical, commercial and military competition could trigger negative repercussions.

Two, arms deals and defence support provided by other global powers can clash with the EU's instruments for the provision of security, such as SSR. For example, the growing volume of Russian arms sales to sub-Saharan Africa has an impact on the mandate and effectiveness of the EU's CSDP missions, such as EUTM-RCA, in matters related to SSR and the implementation of the integrated approach to support the transition process. Russian mercenaries present in sub-Saharan African countries, for instance the Wagner Group in Northern Mozambique, can

2 Samuel Ramani, "Moscow's Hand in Sudan's Future", Carnegie Endowment for International Peace, July 11, 2019, <https://carnegieendowment.org/sada/79488>.

3 Council of the EU, "Sudan: Foreign Affairs Council statement", Brussels, June 17, 2019: <https://www.consilium.europa.eu/en/press/press-releases/2019/06/17/sudan-foreign-affairs-council-statement/>.

also undermine international security cooperation and fuel instability.

Overall, the defence dimension of global power competition can have the most direct impact in making sub-Saharan Africa more insecure, due to the likelihood of military competition emerging or unregulated flows of arms towards fragile settings. Furthermore, the US 'blank slate review', if confirmed by the next US Administration, risks exacerbating the disalignment between US and EU security interests in Africa, especially in the Sahel.

Fourth, global power competition may be particularly strong in the Indian Ocean. New alliances and dynamics are forming here. India and Japan have stepped up strategic dialogue in order to develop joint policies in the Indian Ocean, which culminated in 2017 in the AAGC. One of the main tenets of their engagement is to balance China's rise in the area. Russia and Saudi Arabia have also expanded their presence in the region. Russia and Madagascar have a close relationship, as Moscow reportedly played a key role in the 2019 Madagascar elections. In 2018 Saudi Arabia pledged \$22 million for a water project in Comoros, and the relationship between the two countries has continued to grow in sectors such as tourism, agriculture and energy. In the coming years, the geopolitical relevance of coastal states and islands in the Indian Ocean is set to increase, given their location near transit routes providing access and influence over important chokepoints and waterways. As EU member states other than France may increase their attention towards the area, the geopolitical competition may turn fierce, especially if combined with instability (trafficking, crime, maritime insecurity) and political spoilers (such as the Diego Garcia dispute).⁴

The implementation of the AfCFTA in the next decade will increase the urgency for infrastructure development.

A final area potentially fraught with hazard is global competition for infrastructure development, whether physical or digital. Sub-Saharan Africa's infrastructure gap is huge: its infrastructure services are costly and of poor quality compared to other parts of the world. It is estimated that this holds back productivity by up to 40% and lowers the continent's GDP by about 2% per year. The implementation of the AfCFTA in the next decade will increase the urgency for infrastructure development. Brazil, China, India, Korea, Malaysia, Russia and Turkey are examples of new partners that will increase their contribution to infrastructure development, driven by national interests such as access to commodities, natural resources and the desire to enlarge their spheres of influence. Those players have a competitive edge over traditional Africa partners, above all European ones. Often, their firms are not subject to the trans-

parency, environmental and labour standards that apply to the operations of DAC economies in Africa. In some circumstances this provides them with the capacity to underbid firms from Africa's Western and European partners. Infrastructure is viewed as a crucial ingredient to foster growth and productivity. Amid the post-Covid-19 slowdown, sub-Saharan Africa urgently needs to continue the growth momentum it has experienced in recent decades. Since only an adequate supply of infrastructure can help achieve that goal, competition for infrastructure financing and development is only set to increase.

Despite those hazards and a growing pattern of competition, the analysis has shown that there are some entry points for cooperation that could be leveraged to mitigate risks and maximise opportunities for EU interests in sub-Saharan Africa. Some of them are low-hanging fruits.

⁴ Sovereignty over the Chagos Archipelago is disputed between Mauritius and the United Kingdom. In May 2019, the UN passed a resolution demanding that the UK return control of the Chagos Islands to Mauritius. The UK has not handed over control yet as it does not recognise Mauritius' claim to sovereignty. The largest island in the Archipelago, Diego Garcia, is strategically important as it hosts a US military airbase.

Japan, in particular, is in line with EU member states' strategic approach. Its longstanding engagement as a top ODA donor, emphasis on private sector development and experience in developing human capital could be an added value for EU member states to ensure that economic partnerships are as beneficial as possible for African countries. A broader framework of cooperation for the EU is to be conceived as part of the growing synergies between Japan and India, namely in the Indian Ocean. India and Japan's commitment to forging stronger strategic and commercial links, and extending outreach to Asia and Africa, fits in well with the EU's priority of promoting connectivity. New patterns of trilateral cooperation to ensure maritime security, boost trade and economic growth and at the same preserve and advance the establishment of a rules-based international order can be found around the AAGC. There is also room for deepening cooperation on a free and open 'Indo-Pacific', upholding sustainable connectivity and quality infrastructures, as stated in the Joint Communication 'Connecting Europe and Asia – Building Blocks for an EU Strategy'. Synergies with India and Japan may also help counter narratives that are opposed to or at odds with Western values⁵ and increase information sharing and joint maritime surveillance in the Indian Ocean, thereby reinforcing capacities to fight against piracy and armed robbery, and ensuring maritime security and freedom of navigation, which are key interests for the EU.

Fostering a cooperative approach with other global powers may prove more difficult, but can be worth trying, to avoid or minimise confrontation. EU-China know-how complementarity through enhanced business cooperation can be an example of such an approach. In particular, tripartite cooperation for infrastructure

projects involving African countries can be a promising framework to mitigate some of the direct and unintended negative consequences of China's strategy, such as the debt trap or poor sustainability and conflict sensitivity of infrastructure development.

Finally, two important elements to take into account are transatlantic cooperation and EU-UK relations post-Brexit. In both cases, the relationship among long-standing allies has been put under strain by political developments, whether this means a strategic shift (US) or a 'divorce' (Brexit). Starting with the latter, room for cooperation between the EU and the UK remains substantial despite Brexit, as is the alignment in terms of values, narratives and strategic objectives. If not complicated by the intricacies of leave negotiations, the continuation of a close relationship and cooperation between the two sides of the Channel can be expected, especially across the security-development-peace nexus. With the US, cooperation may prove very complex in the short term, as the Trump Administration's approach jeopardises European security interests in sub-Saharan Africa and the European and American narratives towards sub-Saharan Africa diverge significantly. Against this backdrop, a quest for EU strategic autonomy *vis-à-vis* the US in its engagement with sub-Saharan Africa can be expected. While the space for transatlantic cooperation in sub-Saharan Africa is becoming narrower, revamping the relationship when the political context allows could be beneficial for both powers, and provide an important contribution to reinforcing multilateralism, particularly as the US will remain the leading provider of development aid and an influential political player in the continent.

5 On EU-India cooperation specifically, see: Karel Lannoo and Stefania Benaglia, "Could the EU and India jointly shape the world?" *CEPS Commentary*, May 13, 2019, <https://www.ceps.eu/could-the-eu-and-india-jointly-shape-the-world/>

International support to sub-Saharan African countries affected by Covid-19

Where the main donors have provided assistance as of June 2020

China



European Union

Team Europe response



India



Qatar



Russia



Turkey



United Arab Emirates



United Kingdom



United States



Data: CSIS, 2020; European External Action Service, 2020; Natural Earth, 2020

A GLIMPSE INTO THE FUTURE: EU STRATEGIC THINKING IN TIMES OF UNCERTAINTY

At the time this publication is coming out, the Covid-19 pandemic is reshaping the global order, in ways that are not yet determined, due to

the ongoing evolution of the crisis and its broader socio-economic implications. A question therefore arises as to what extent the pandemic will change the strategic postures outlined in this volume. Exogenous economic or political shocks can change both the rules of the game and the strategies of individual players as well as relations between them. But with regard to European and global actors' strategies towards Africa, much is likely to remain the same. Africa will remain a continent where the EU (and other powers) have direct security and economic stakes. The partnership between the two continental blocs is deep-rooted and

unlikely to be durably affected by the crisis. Global powers' interests will also be maintained. What is likely to change, however, is the African strategic map, with Covid-19 accelerating some pre-existing trends. African leaders will push to have a bigger say on global issues, ranging from climate change to trade, getting a seat at the table, and shaping the post-Covid-19 world.⁶ They will likely be more selective about the strategic partners they choose (having a wide pool of competitors) and boost their commitment to multilateralism and regional integration, to be able to cope with the economic consequences of Covid-19. The most important variable to understand the evolution of the new scramble for Africa in the post-Covid-19 world will therefore be the strategic assertiveness of African countries, and their capacity to translate this into a collective African voice shaping global order.

That said, there are three short-term implications of Covid-19 that can pose a strategic challenge to EU-Africa relations, and therefore should be given policy attention. First, the pandemic has been accompanied by a rise in political violence around the world, and particularly in Africa.⁷ Armed groups have capitalised on the crisis, as governments were distracted and focused on containing the spread of the virus, and tackling its socio-economic implications. On 23 March, terrorist attacks by Boko Haram in the Lake Chad Basin area killed 150 members of the Chadian and Nigerian armed forces.⁸ The day before, insurgents attacked and occupied Mocimboa da Praia, a town in the

gas-rich Cabo Delgado district of Northern Mozambique.⁹ Containing the expansion of violent extremism, to prevent increased instability and conflict, is as important for EU security interests and for its partnership with Africa as containing the spread of the virus.

Second, the economic fallout of the Covid-19 pandemic in Africa will be severe, even worse than the consequences of the 2008 financial crisis – according to the World Bank, it will trigger the first recession in 25 years.¹⁰ With all major global economies facing a simultaneous recession and travel restrictions likely to remain in force for months, if not years, economic growth in Africa will stop abruptly, entailing a drop in the demand for natural resources, remittances flows, and import/export volumes. The situation is also likely to delay the implementation of an AfCFTA. If Africa stops growing, the result is likely to be an increase in poverty and inequality, which may in turn lead to political violence, humanitarian crises such as intra-African population displacements and a return of massive migration towards Europe in the short to medium term.

The pandemic has been accompanied by a rise in political violence around the world, and particularly in Africa.

Third, there are potentially unprecedented humanitarian implications of a possible spread of Covid-19 in Africa, with forecasts ranging from 300,000 to worst-case scenarios of 3.3 million deaths,¹¹ given the limited capacity of health-care systems in the continent to handle the pandemic wave. If the proliferation of Covid-19 in Africa is not prevented, the humanitarian

6 Judd Devermont, "A Seat at the Table: African Leadership in a Post-Covid-19 World", *CSIS Commentary*, June 12, 2020.

7 Katarina Mustasilta, "From Bad to Worse? The impact(s) of Covid-19 on conflict dynamics", *EUISS Brief* no. 13, EUISS, June 2020.

8 "92 Chad soldiers killed in 'deadliest' Boko Haram attack", *Al Jazeera*, March 25, 2020, https://www.aljazeera.com/news/2020/03/92-chad-soldiers-killed-deadliest-boko-haram-attack-200325010212370.html?utm_source=website&utm_medium=article_page&utm_campaign=read_more_links

9 See: Emilia Columbo, "Supporting Mozambique's Response to the Growing Insurgent Threat in Cabo Delgado", *CSIS Commentary*, April 2020.

10 The World Bank, "Covid-19 (Coronavirus) drives sub-Saharan Africa toward first recession in 25 years", April 9, 2020, <https://www.worldbank.org/en/news/press-release/2020/04/09/covid-19-coronavirus-drives-sub-saharan-africa-toward-first-recession-in-25-years>

11 United Nations Economic Commission for Africa (UNECA), *Covid-19 in Africa: Protecting Lives and Economies*, April 2020, p. v. See also: Florence Gaub and Giovanni Faleg, "Clock is ticking: 300,000 vs 3.3m Covid-19 Africa deaths?", *EUObserver*, May 26, 2020, <https://euobserver.com/opinion/148448>.

costs could be massive, both in terms of loss of life and funding needed for crisis response. This is a nightmare scenario that may put EU-Africa relations under unprecedented strain, especially if other global powers (such as China or Russia) fill the gap by leveraging their expanded presence and influence in the continent and their ability to mobilise resources more quickly. The care package support and donations provided by the Chinese Jack Ma Foundation to the 54 African countries to boost the Covid-19 response, is just one example of the high visibility that foreign non-state, non-Western actors can achieve: it received so much attention in the media that it nearly overshadowed the aid packages agreed by the EU, through the 'Team Europe' Global EU response,¹² and international financial institutions.¹³ Being faster at mobilising resources and more visible in showing solidarity is both a geopolitical and moral imperative for Europe. Looking beyond these three challenges, the EU's strategic thinking towards Africa could benefit from a new concept of European power in line with the priorities set for

the next decade. This would mean revisiting old geopolitical calculations to reinforce competitive advantage *vis-à-vis* other global actors, fostering coordination among EU member states to minimise fragmentation, and better capturing African needs and strategic orientations. At the same time, reinforcing the fourth priority of the EU Global Strategy, which aims at building 'cooperative regional orders', can not only bring Africa and Europe closer together, but also mitigate patterns of power competition and foster cooperation with those global actors willing to share concrete commitments towards a sustainable future. The 2020 'strategic crossroads' provides a unique opportunity to decision-makers in both continents to view the world not as it is, but as they would like it to be. Thirteen years after the Joint Africa-EU Strategy, a new consensus on values, joint interests and common strategic objectives can make Europe and Africa more resilient, steadily navigating the turbulent waters of a multipolar world with likeminded partners.

12 European External Action Service (EEAS), "Team Europe' – Global EU Response to Covid-19 supporting partner countries and fragile populations", April 11, 2020, https://eeas.europa.eu/headquarters/headquarters-homepage/77470/%E2%80%9Cteam-europe%E2%80%9D-global-eu-response-covid-19-supporting-partner-countries-and-fragile-populations__en

13 "Rwanda's Kagame thanks Jack Ma for 'huge shot in the arm' after receiving donation of test kits", CNN, March 22, 2020? <https://edition.cnn.com/2020/03/16/africa/jack-ma-donate-masks-coronavirus-africa/index.html>.



ABBREVIATIONS

AADP

Africa Agri-Food Development Programme

AAGC

Asia-Africa Growth Corridor

AAPSO

Afro-Asian People's Solidarity Organisation

ACP

African, Caribbean and Pacific

AFAD

Disaster and Emergency Management Authority

AfCFTA

African Continental Free Trade Area

AfDB

African Development Bank

AFRICOM

United States Africa Command

AIEF

Africa Ireland Economic Forum

AKP

Justice and Development Party

AU

African Union

BRI

Belt and Road Initiative

CEO

Chief Executive Officer

CNN

Cable News Network

COAFR

Africa Working Party

Covid-19

Coronavirus disease 2019

CSDP

Common Security and Defence Policy

CwA

Compact with Africa

DAC

Development Assistance Committee

DRC

Democratic Republic of the Congo

EEAS

European External Action Service

EU

European Union

EUCAP Sahel Mali

EU Capacity Building Mission in Mali

EUCAP Sahel Niger

EU Capacity Building Mission in Niger

EUCAP Somalia

EU Capacity Building Mission in Somalia

EUGS

EU Global Strategy

EUTM Mali

EU Training Mission in Mali

EUTM-RCA

EU Training Mission in Central African Republic

EUTM Somalia

EU Training Mission in Somalia

FOCAC

Forum for China-Africa Cooperation

FTA

Free Trade Agreement

GCC

Gulf Cooperation Council

GDP

Gross Domestic Product

IGAD

Intergovernmental Authority on Development

ITEC

Indian Technical and Economic Cooperation

JAES

Joint Africa-EU Strategy

JCG

Japan Coast Guard

JDSF

Japanese Self-Defence Force

JETRO

Japan External Trade Organisation

JICA

Japan International Cooperation Agency

JOGMEC

Japan Oil, Gas and Metals National Corporation

MENA

Middle East and North Africa

MIADIT

Bilateral Training Mission for Police Forces in Djibouti and Somalia

MINUSCA

United Nations
Multidimensional
Integrated Stabilisation
Mission in the Central
African Republic

MINUSMA

United Nations
Multidimensional
Integrated Stabilisation
Mission in Mali

MISIN

Bilateral Mission of Support
to the Republic of Niger

MONUSCO

United Nations
Organization Stabilisation
Mission in Democratic
Republic of the Congo

MS

Member States (European
Union)

NATO

North Atlantic Treaty
Organisation

NDS

National Defense Strategy

NGO

Non-Governmental
Organisation

NSS

National Security Strategy

ODA

Official Development
Assistance

OECD

Organisation for Economic
Co-operation and
Development

OIC

Organisation of Islamic
Cooperation

PLAN

People's Liberation Army
Navy

PPP

Public-Private Partnership

REC

Regional Economic
Community

R4I

Resources for Infrastructure

SLOC

Sea Lines of Communication

SSR

Security Sector Reform

StratCom

Strategic Communications

TICAD

Tokyo International
Conference on African
Development

TIKA

Turkish International
Cooperation and
Coordination Agency

UAE

United Arab Emirates

UAV

Unmanned Aerial Vehicle

UK

United Kingdom

UN

United Nations

UNAMID

United Nations – African
Union Hybrid Operation in
Darfur

UNMISS

United Nations Mission in
South Sudan

US

United States of America

USD

United States Dollars

USSR

Union of Soviet Socialist
Republics

VEO

Violent Extremist
Organisation

As a new image and narrative of Africa as a dynamic 'land of opportunities' has emerged in the international community, the EU has not been the only actor to look at the continent through fresh lenses. A number of global powers have become increasingly engaged with Africa, projecting economic or political influence and creating new patterns of multipolar competition, which some observers have described as a 'new scramble for Africa'.

This *Chaillot Paper* analyses the evolution of EU member states' strategies towards sub-Saharan Africa, as well as those of global actors, against the backdrop of systemic changes, including the implications of the Covid-19 pandemic. It seeks to identify the points of convergence – and divergence – in member states' strategies, and examines how a coherent, joint EU strategy can be achieved. It also shows that there is significant variation in global powers' strategies towards sub-Saharan Africa, and only limited synergies with European ones. As the EU elaborates a new approach towards and relationship with the continent, in line with its 'strategic pivot' to Africa, it is likely to face adverse competition on a number of economic and geopolitical fronts. But it can also embrace opportunities for enriched international cooperation, reinforcing multilateralism and shaping a more sustainable future.