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CHINA AND AFRICA 2.0

Crafting a New Era of Partnerships: 20 Trends



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This report has been edited in close consultation with Univ.-Prof. Dr. Xuewu Gu. It is an extension of the study “China’s Engagement in Africa: Activities, Effects and Trends”. Dr. Gu is Professor and Chair of International Relations at the Institute of Political Science and Sociology and Director of the Center for Global Studies at the Rheinische Friedrich-Wilhelms-University of Bonn, Germany.

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EXECUTIVE SUMMARY

By April 2022, 52 of 54 African countries had signed a Belt and Road Initiative (BRI) Memorandum of Understanding with China, a clear indicator that the flagship project of China's foreign policy in the 21st century is penetrating the entire African continent. In late 2019, China launched a revision of the Belt and Road Initiative, BRI 2.0, that aims to be more green, more sustainable, more digital, and more inclusive of investments in healthcare services.

China acts as a newcomer in the landscape of Africa's Special Economic Zones (SEZs) and Economic and Trade Cooperation Zones (ETCZs). However, the country's tiny share on total SEZs in Africa (less than 0,3%) indicates that Beijing seems to have no desire to export its development model to Africa or to try to "colonize" the continent with Chinese philosophy, institutions and business models.

For more than 10 years, annual Chinese foreign direct investment (FDI) flows to Africa grew moderately from \$2.1 billion in 2010 to almost \$5.4 billion in 2018, with the exception of 2019, when Chinese FDI declined to \$2.7 billion. This hesitation is mainly affected by the overall trend of shrinkage of China's FDI based on investors' attitudes awaiting further information on upgrading the BRI from 1.0 to 2.0. In 2020, the strategic clarity of BRI 2.0 has encouraged Chinese investors to continue to invest heavily across Africa throughout the pandemic which increased again to \$4.2 billion.

China-Africa trade reached a record high of \$254 billion in 2021; an impressive increase of 35 percent in comparison with 2020, begging the question if this is a long-term trend or a flash in the pan. Nevertheless, this strong increase is remarkable, particularly since it is made up of an increase in both Chinese exports to Africa (29.9 percent yearly) and imports from Africa (43.7 percent yearly).

Not every country in Africa benefits from China's investments in the same intensity. In actuality, the beneficiaries are not equally distributed over the continent. Of all Chinese FDI in 2020, 63 percent was focused on only ten countries: South Africa, DRC, Zambia, Ethiopia, Angola, Nigeria, Kenya, Zimbabwe, Algeria, and Ghana. This concentration of investment in ten markets leaves only approximately \$380 million for each of the other recipients, a sum which averages at only half the sum amounting from loans.

The resurgence of Chinese FDI in Africa is a clear sign of Beijing's willingness to continue to shape Africa's FDI landscape in the coming post-pandemic years. Indeed, projects attracting minerals and raw materials are paving the way for investments in the African service sector such as scientific research and technology services, transport, warehousing, smart cities, and postal services.

The top 10 African trading partners of China account for more than 66 percent of the trade between China and Africa. Topping the list is South Africa, which accounts for \$54 billion or 21 percent of total China-Africa trade. It is followed at some distance by Nigeria and Angola. In contrast, only seven African countries recorded a decline in trade volumes, namely Central African Republic, Gabon, Sudan, Chad, Western Sahara, Sao Tome and Principe, and South Sudan. Nevertheless, while the Central African Republic was able to export 62 percent more goods to China, Sao Tome and Principe imported three times the volume of Chinese goods compared to the previous year, even though neither of them joined the BRI until 2021.

With 18 percent of the total share of external debt, China became the most significant debt relief country in the world. It suspended \$5.7 billion in debt payments, more than half of the total global debt moratorium and 45 percent of its own debt ratio. By doing so, the country presents itself as a champion of "debt relief" rather than of a "debt trap".

The COVID-19 Pandemic has accelerated the expansion of the so-called "Health Silk Road" to Africa enabling China to play a leading role in sharing masks, respirators and vaccines with the continent. As a result, China emerges as a country that is temporally earlier than the U.S. and spatially wider than the EU in providing Africa with COVID-19 vaccines and other medical supplies to combat the pandemic.

With the prospect of the COVID-19 pandemic continuing, China-Africa aid, investment and trade in medical supplies will see growth in the short term. Given the pre-pandemic pattern of medical cooperation between China and Africa which was dominated by aid, and the unstable trend of trade and investment in pharmaceutical products, the long-term trend in the area of investment and trade is still unclear.

China's industrial and infrastructure investments in Africa have declined due to the combined effects of the previous global economic slowdown and the COVID-19 pandemic, and are gradually shifting to green and sustainable as well as digital sectors. It seems that China is starting to pay more attention to the impact of its investment and construction in the natural and social environments.

Chinese technology and infrastructure companies are becoming a crucial factor in the rapid modernization of African societies and economies. Chinese mobile phone producers dominate African markets. Huawei is more or less monopolizing the transformation of Africa's telecommunication networks from 4G to 5G even though the infrastructure stacks of African countries remain a mix of Western and Chinese technology.

China is making vigorous efforts to increase its military cooperation with African countries attempting to position itself as a reliable security provider for the continent. Beijing leans mainly on using UN peacekeeping operations as a platform for its security engagement in Africa. Of the five permanent members of the UN Security Council (UNSC P5), China has become the biggest contributor to military observers, verifiers, inspectors, police operations and peacekeeping troops by order of the United Nations.

In recent years, military cooperation between China and Africa has been increasingly institutionalized in that China is taking advantage of the BRI to bestow its projects with a wider framework. Unlike France and the U.S. which maintain a large overt troop presence in Africa, China tends to integrate its military cooperation into UN peacekeeping operations or to present it as accompanying measures to its economic relations with African countries.

Soft power, which is gaining increasing importance today, refers to the ability to get desired outcomes in international affairs not by (military) coercion or (economic) inducement, but by (cultural) attraction. Africa is encountering a China that recognizes this form of power. Indeed, most African countries are gaining first-hand experience with strong inflows of Chinese soft power elements.

The "Big Four" in the Chinese international media landscape (Xinhua News Agency, Central China Television, China Radio International, and China Daily) have stepped up their game, and Africa has become a key target across the board. At the same time, the number of Confucius Institutes has risen globally to about 550 over the past few years. In Africa, they now rank only second to the French Alliance Française.

China has become a major hub of international student mobility, especially for Africa. In 2020, it ranked second only to France among top destinations for African students, with Ghana, Nigeria, Tanzania, Zambia, and Zimbabwe as the leading countries of origin.

Despite China's role as a key player in the race for soft power in Africa and around the world, opinion polls and surveys indicate some concerns regarding perceptions of China abroad, a sure sign that the country has a long way to go to enhance the effects of its soft power tools.

The number of Chinese workers going to Africa has declined significantly due to the overlapping effects of travel restrictions since the pandemic and the economic slowdown that preceded the pandemic. It is also a result of the upgrading of the BRI 1.0 to BRI 2.0, requiring Chinese corporations to create more jobs for the local workforce. Numbers of Chinese visitors and emigrants to Africa are expected to remain low for some time to come due to China's strict pandemic containment strategy, tight restrictions on entry and exit, and the lack of medical infrastructure in Africa.

INTRODUCTION

As Michelle D. Gavin, former U.S. Ambassador to Botswana pointed out, all major powers are facing the same facts: “by 2050, a quarter of the world’s population will be African and the continent’s youthful and growing labor force — the largest in the world by that point — will stand in stark contrast to the ageing populations of other regions”.¹ From the vantage point of global diplomacy, Africa’s unique advantage is its large number of states which constitute “a voting block of 28% at the United Nations (UN)”.² In terms of geopolitics, the continent presents itself as an indispensable maritime gateway from Asia to Europe and back. Geoeconomically, with a population of 1.3 billion and a land area of 30.37 million km², bestowed with considerable resources, Africa remains an uncharted territory with huge potential to reach the centrality of global economy in the coming decades.

In contrast to the United States which has deployed more than 6000 troops “on the ground in Africa”,³ China has chosen an economic path to engage with the continent even though Africa-China security cooperation is intensifying. In fact, there is a long tradition of Chinese investments in infrastructure, reaching back to the period of decolonization. A famous example is the construction of a train line between Tanzania and Zambia (completed in 1976), where China sent around 56,000 engineers and workers to build 320 bridges, 22 tunnels and 93 stations.⁴

In 2021, the China Civil Engineering Construction Corporation and the China Railway Construction Limited announced that they will construct a \$1.32 billion train connection between the Lake Victoria port city of Mwanza and the town of Isaka, Tanzania. The 341 km train line is part of a railway network connecting the Indian Ocean port of Dar es Salaam with the hinterland.⁵ Even more than railways, Chinese companies have been the leading actor in African dam projects, only surpassing Chinese construction activities in Southeast Asia.⁶ Most recently, the Ethiopian renaissance dam, the biggest and one of the most controversial dam projects in the last decade, was completed with Chinese engineering expertise and diplomatic support. In 2013, China gave Ethiopia a \$1.3 billion loan to build transmission lines from the dam that distribute the expected 6.45 gigawatts of electricity.⁷

However, the tide seems to be changing. Chinese activities in Africa, which have been largely uncoordinated and mutually less supportive, are increasingly integrated into Beijing’s ambitious “Belt and Road Initiative (BRI)”. Indeed, the 21st-Century “Maritime Silk Road”, the second pillar of BRI, bestows Africa with a central role in connecting Asia and Europe. The program aims to link “a string of operating ports strategically positioned along the littorals, sea lanes and choke points of the South China Sea, the Bay of Bengal, the Indian Ocean, the Arabian Sea, the Persian Gulf, the Red Sea and the Mediterranean”.⁸ For Beijing, Africa is indispensable to keeping its Maritime Silk Road strong and effective. To this purpose, the country is fervently in the process with its African partners to pool together the coastline of the continent with ports, digital infrastructures, airports, healthcare services, and “smart cities”, one of the 20 megatrends found by this study.

These activities demonstrate that China’s engagement in Africa is fully integrated into the BRI 2.0 since late 2019. BRI 2.0 as a revision of BRI 1.0 overhauls the most negative and high-risk elements of the initial phase (2013-2019). More “green”, more “sustainable”, more “digital” as well as more “health-care” are the pledges of Beijing to Africa. The 20 trends identified by this study confirm the wiliness of Beijing to implement this new agenda for Africa. It remains to be seen to what extent the promises will become reality in the foreseeable future.

1 Gavin, Michelle D.: Major Power Rivalry in Africa, Discussion Paper Series on Managing Global Disorder No. 5 May 2021, Center for Preventive Action, Council on Foreign Relations, May 2021, p. 1., accessed April 22, 2022, <https://www.cfr.org/report/major-power-rivalry-africa>.

2 Chanaka, Teshome Toga: China-Africa cooperation, published by CCG (Center for China and Globalization), April 4, 2022, accessed April 4, 2022, <https://mp.weixin.qq.com/s/EI6BaD3L1T5ByNF78nW-g>.

3 Ibid., p. 4.

4 “China Helped Us When Help Was Most Needed” — The Tanzania-Zambia Railway: A Testament to China-Africa Friendship. (The Global Times, June 22, 2021), accessed April 5, 2022, <https://www.globaltimes.cn/page/202106/1226766.shtml>.

5 Two Chinese firms to build \$1.32 billion Tanzanian rail line. (Reuters, January 7, 2021), accessed April 5, 2022, at <https://www.reuters.com/article/uk-tanzania-railway-idUSKBN29C20X>.

6 The New Great Walls. A Guide To China’s Oversea Dams Industry (International Rivers, Second Edition, November 2012), accessed April 5, 2022, at <https://www.globalccsinstitute.com/archive/hub/publications/162708/new-great-walls-chinas-overseas-dam-industry.pdf>, p. 6; see also: Bosshard, Peter: China dams the world, in: World Policy Journal Volume 26, Issue 4, 2009, pp. 43-51.

7 Gorvett, Jonathan: China in the middle of Nile mega-dam feud. (Asia Times, July 31, 2021), last accessed April 5, 2022, at <https://asiatimes.com/2021/07/china-in-the-middle-of-nile-mega-dam-feud/>.

8 Arase, David: The Belt and Road Initiative Enters a Second Phase, in: Asia Global Online, April 15, 2021, Accessed April 22, 2022, <https://www.asiaglobalonline.hku.hk/belt-and-road-initiative-enters-second-phase>.

1. DIPLOMACY, TRADE & INVESTMENT

1.1 The Belt and Road Initiative (BRI) is penetrating the entire continent

The Belt and Road Initiative (BRI) is China's major foreign policy directive since 2013 and initiated in Africa in 2015. By simply looking at a map of the African continent, the BRI seems to be a success story. Of the 54 African countries, 52 have already signed a Memorandum of Understanding (MoU) concerning the BRI, rendering these countries official participants. Cameroon, Somalia and South Africa are among the first countries to sign a MoU. The most successful year was 2018, when 28 African countries entered the BRI. During the first year of the COVID-19 pandemic, no new MoUs were signed, but in 2021, Botswana, the Democratic Republic of Congo, Eritrea, the Central African Republic, Guinea-Bissau, Sao Tome and Principe and Burkina Faso revived the BRI's expansion. Malawi signed the latest MoU in March 2022. As of April 2022, only Eswatini and Mauritius had not signed a MoU. In other words, about 96 percent of all African countries have already signed a MoU. Since Mauritius signed a Free Trade Agreement with China in 2019, a future BRI MoU is likely. Thus, not having signed a MoU does not exclude bilateral trade agreements.

African member states of the BRI

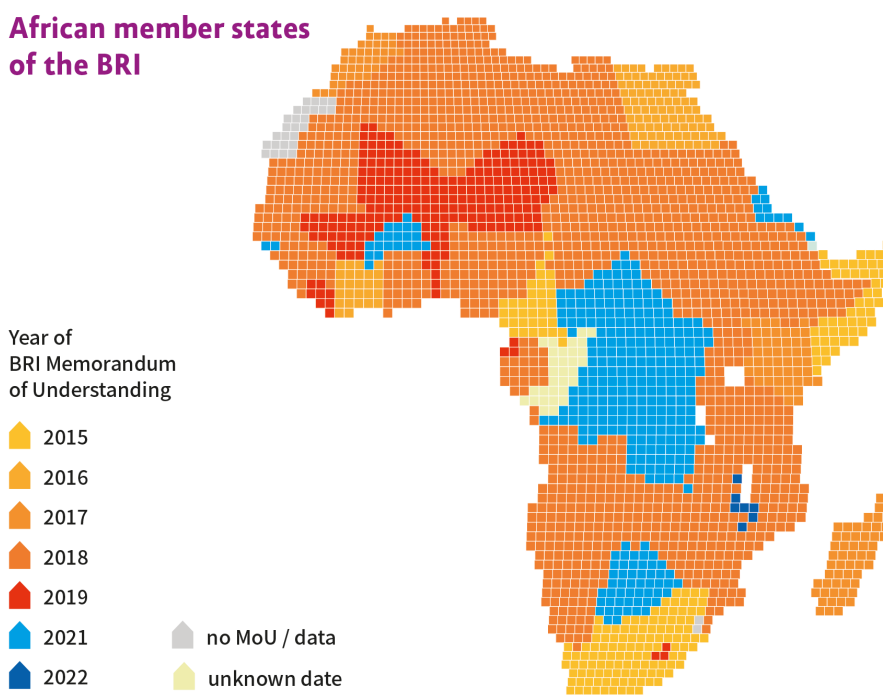


Figure generated by C. Heidbrink (2022). Source: Green Finance & Development Center
Chart: Schwachow Visual Stories

Considering the centrality of BRI to China's foreign policy, it is almost impossible to distinguish BRI projects from non-BRI projects. This is also due to the fact that China's engagement predates and exceeds the BRI. Many infrastructure projects which were already planned before the official announcement of BRI have later been relabeled and subsumed under the BRI. This "rebranding" of infrastructure projects can also be observed in Africa. Kenya's Standard Gauge Railway (SGR) connecting Mombasa to Nairobi, for example, was already planned long before the BRI by Kenyan officials. The cooperation agreement with China was signed in May 2014, hence after the BRI's announcement by Xi Jinping in 2013 but prior to the BRI's official creation in 2015.

1.2 Beijing is coy to expand its “Special Economic Zones” in Africa

Special Economic Zones (SEZs) and Economic and Trade Cooperation Zones (ETCZs) have played an essential role in China’s modernization since Deng Xiaoping started to reform and open the country to the world in the 1980s. Applying the model of SEZs and ETCZs to Africa has been seen by Beijing as an effective measure to promote China’s engagement in the continent and to enhance the international competitiveness of Chinese companies in the world. Therefore, it is surprising that Beijing’s advancement of SEZs and ETCZs in Africa has noticeably diminished after the boom years in the wake of the country’s entry into the WTO in 2001. Since 2007/2008, when the currently existing SEZs and ETCZs were added, no single new SEZ or ETCZ has been established. As the table “Chinese SEZs and ETCZs in Africa” shows, Beijing’s advancement of SEZs and ETCZs in Africa has been stagnating in quantity for years.

Chinese SEZs and ETCZs in Africa⁹

| Country | SEZ or ETCZ | Starting year | Developers | Sectors |
|------------------|---|---------------|--|---|
| Zambia | Zambia-China ETCZ (ZCCZ) | 2007 | Non-Ferrous China Africa, subsidiary of CNMC | Copper mining |
| Algeria | Jiangling ETCZ | 2008 | Chinese Jiangling Motors Cooperation: Jiangxi Coal Corporation Group; Groupe Mazouz | Automobile |
| Egypt | TEDA Suez ETCZ | 2008 | Tianjin Development Zone and Tianjin TEDA Investment Holding Co., Ltd. | Construction materials, manufacture and logistics, commercial and entertainment |
| Nigeria | Nigeria Lekki FTZ | 2007 | China Civil Engineering Construction Group; Jiangning Development Corporation; Nanjing Beyong; China Railway | Transport equipment, textile and light industries, home appliances, telecoms |
| Nigeria | Ogun-Guangdong Free Trade Zone (OGFTZ) | 2008 | Guangdong Xinguan; South China Development Group | Construction materials, wood processing, medicine, PCs and lighting |
| Mauritius | Mauritius Tianli ETCZ (currently Jinfei ETCZ) | 2007 | Taiyuan Iron & Steel Co; Shanxi Coking Coal Group; Tianli Group | Hospitality, real estate, services, manufacture and logistics |
| Ethiopia | Ethiopia Eastern Industrial Zone | 2007 | Qiyuan Group; Jianglian International Trading Co; Yangyang Asset Management | Electric machinery, steel and metallurgy, construction material |

At the first Forum on China-Africa Cooperation (FOCAC) Summit held in Beijing in 2006, the then Chinese President Hu Jintao announced the establishment of three to five trade and economic cooperation zones in Africa in the years 2006-2009.¹⁰ Quickly after the announcement and driven energetically by governments of both China and Zambia, the first Chinese overseas economic and trade cooperation zone in Africa, the Zambia-China Cooperation Zone (ZCCZ), was established in February 2007. The zone emerged from the strategic interests of both sides: China is interested in Zambia’s copper reservoirs and market, while Zambia desires to attract more investment and development chances, especially to “develop a manufacturing base around its mining sector”.¹¹

9 Alves, Ana Cristina: Chinese Economic and Trade Co-operation Zones in Africa: The Case of Mauritius, South African Institute of International Affairs. Occasional Paper No.74, January 2011, accessed on April 5, 2022, at https://media.africaportal.org/documents/saia_sop_74_alves_20110131.pdf, p. 6.

10 Ren, Xiaoping: The Forum on China-Africa Cooperation and Its Significance for Namibia, November 8, 2009, accessed April 3, 2022, at <https://www.fmprc.gov.cn/ce/cena/eng/zngx/t625458.htm>.

11 Meng, Guangwen, Sui, Nana and Wang, Xue: Construction and Development of the Zambia-China Economic and Trade Cooperation Zone. *Tropical Geography*, 2017, 37 (2): 246-257.

In the same year, the Chinese government approved the Sino-Nigeria Lekki Free Zone (LFZ) and signed a framework agreement with the Mauritius government targeting the establishment of “Mauritius Tianli ETCZ” (currently Jinfei ETCZ). In 2007, Ethiopia Eastern Industrial Zone was founded and has been treated with great importance by the Chinese and Ethiopian governments.¹² The years 2007-2008 have witnessed the founding of the second free trade zone between China and Nigeria – the Ogun-Guangdong Free Trade Zone (OGFTZ). Also in 2008, China and Algeria entered into an agreement to launch a new Chinese SEZ in North Africa – the Jiangling Economic and Trade Cooperation Zone, which focused on the automobile industry. Around the same time, China and Egypt established the TEDA Suez ETCZ, aiming to invite Chinese companies to set up their industries. Presently, the cooperation zone has become a significant platform for China-Egypt economic and trade cooperation.¹³

However, the fact that the number of seven Chinese SEZs and ETCZs in Africa has remained unchanged for years does not mean that Beijing has ceased to enhance the quality and effects of its SEZs and ETCZs on the continent. On the contrary, China’s SEZs and the ETCZs in Africa have strictly focused on resource-rich countries such as Egypt, Algeria, Zambia and Nigeria, and on countries with larger populations such as Nigeria, Egypt, Ethiopia and Algeria, demonstrating an impressive strategic clarity for its SEZ-ETCT-Advancement. All these SEZs and ETCZs have been promoted by the so-called “Going Global” strategy, a flagship project used by Beijing to enhance the global reach of China’s economy and corporations. They continue to enjoy strong support from the Chinese government.

In recent years, however, China’s strategy has shifted. Instead of establishing new SEZs and ETCZs, China has set out to deepen and upgrade the economic and trade zones. For example, the TEDA Suez ETCZ was officially extended to new business sectors in 2016 in an inauguration ceremony attended by Chinese President Xi Jinping on a state visit to Egypt. In September 2021, China and Zambia strengthened their trade ties, upgrading their existing ETCZ into a comprehensive free trade zone in Southern Central Africa.¹⁴

The stagnation of initiating new Chinese SEZs and ETCZs is related to the overwhelming effects of the BRI on most Chinese overseas projects. In Africa, China makes the economic zones with African countries part of the BRI project, providing old China-Africa SEZs and ETCZs with both new drivers and appearances. On January 27, 2014, the Shanghai-based private investment company Touchroad International Holdings Group and the Djiboutian government signed a MoU to build a special economic zone which will serve as a pivot to the BRI.¹⁴ Additionally, in 2016, the Chinese and Egyptian governments agreed to expand their cooperation during the BRI meeting, especially the desire of Cairo to connect its own development plans with the BRI in the hopes to attract more Chinese investment.¹⁶

Almost by stealth, China-Africa SEZs and ETCZs have started to extend their original focus from mining and manufacturing to high-tech businesses striving for a leading role in shaping African modernity. For instance, The Zambia Development Agency (ZDA) has signed a MoU with the ZCCZ, China Commodities City Overseas Investment (CCCI) and the Belt and Road Joint Research Centre (BRJRC) of the University of Zambia to create a new E-Commerce Industrial Park.¹⁷ The same is true for the inception of the “Eden Garden” located at the heart of Jinfei ETCZ with the goal to spread the “smart city” concept in Mauritius.¹⁸

Nevertheless, China presents itself as a newcomer in the landscape of Africa’s SEZs. Indeed, very few SEZs have been established by China in comparison to other countries and partners. During the 1970s when, the first SEZs were established by African countries and their partners, China was still in the swamp of the “Cultural Revolution” that lead its economy almost to the brink of collapse. It was the country’s entry into the WTO in 2001 that promoted China’s SEZ advance to Africa, as part of its strategy to embrace globalization.

13 China Services Info: Eastern Industry Zone, February 13, 2019, accessed April 2, 2022, at <https://govt.chinadaily.com.cn/s/201902/13/WS5c63c810498e27e33803839f/eastern-industry-zone.html#:~:text=Founded%20in%202007%2C%20the%20zone,from%20governments%20at%20many%20levels.>

14 Chinadaily: China, Egypt joint hands to write new chapter of Suez Canal development, November 18, 2019, accessed April 2, 2022, at <https://www.chinadaily.com.cn/a/201911/18/WS5dd23667a310cf3e355781bf.html>.

15 ZDA: ZDA, ZCCZ, CCCI, BRJRC Collaborate to Create E-Commerce Industrial Park to Strengthen Trade Relations between Zambia and China, September 16, 2021, accessed April 4, 2022, at <https://www.zda.org.zm/index.php/2021/09/16/zda-zccz-ccci-brjrc-collaborate-to-create-e-commerce-industrial-park-to-strengthen-trade-relations-between-zambia-and-china/>.

16 Chinadaily: Touchroad Djibouti Special Economic Zone – African fulcrum of Belt and Road, August 12, 2016, accessed April 5, 2022, at https://www.chinadaily.com.cn/m/touchroad/2016-08/12/content_26451224.htm.

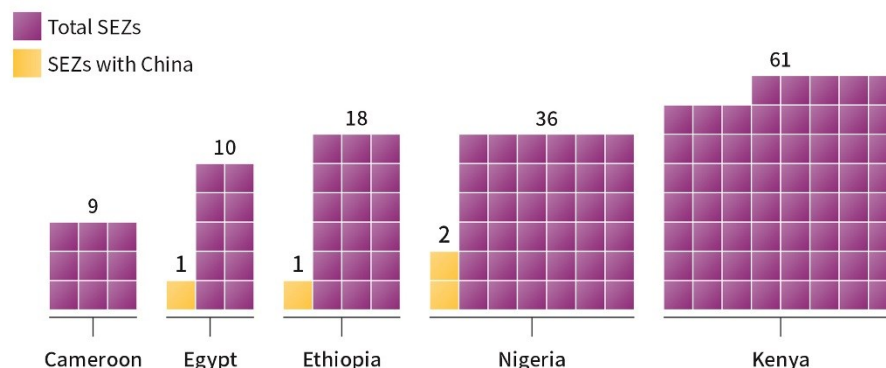
17 Chen, Tianshe and Li, Na: BRI from the prospect of Relations between China and Egypt (“一带一路 视域下的中埃关系”) accessed April 7, 2022, at https://imes.nwu.edu.cn/_local/0/78/7A/B9F92A9CB83F2A1514A32B28EC7_3C33D99F_8BFFD.pdf

18 ZDA: ZDA, ZCCZ, CCCI, BRJRC Collaborate to Create E-Commerce Industrial Park to Strengthen Trade Relations between Zambia and China, September 16, 2021, accessed April 4, 2022, at <https://www.zda.org.zm/index.php/2021/09/16/zda-zccz-ccci-brjrc-collaborate-to-create-e-commerce-industrial-park-to-strengthen-trade-relations-between-zambia-and-china/>.

19 The State Council Information Office of the People’s Republic of China: Chinese firm helps establish smart city in Mauritius as economic ties blossom, July 31, 2018, accessed April 5, 2022, at http://english.scio.gov.cn/beltandroad/2018-07/31/content_57904795.htm.

According to the United Nations Conference on Trade and Development (UNCTAD), there are, at the present time, 237 SEZs in Africa. The largest concentration of them can be found in Kenya (61), Nigeria (38), Ethiopia (18) and Egypt (10).²⁰ Of 134 SEZs established in these “Top Five SEZ-Countries of Africa”, only four were initiated by China accounting for a modest percentage of 0,3%. This shows that, although China is probably the most well-known player in Africa for the time being, other international partners have been more active than China in developing and promoting SEZs in Africa.²¹

China in the landscape of African “Special Economic Zones”



Source: UNCTAD. Figure generated by Huang Ying
Chart: Schwachow Visual Stories

Certainly, all SEZs between China and Africa are energetically supported by the Chinese government, which provides them with relatively stable investment and finance.²² However, China’s tiny share of SEZs in Africa is quite revealing: There is no evidence that Beijing was making vigorous efforts to spread its development model to Africa and trying to “colonize” the continent with Chinese system, philosophy, institutions, and business models.

1.3 China’s FDI to Africa picked up

China began its direct investments in Africa in the 1980s.²³ As the figure below shows, annual Chinese FDI flows to Africa remained relatively stable – from a mere \$2.1 billion in 2010 to almost \$5.4 billion in 2018. However, Chinese FDI flows to Africa declined in 2019 to \$2.7 billion, a drop of 49.8 % compared to the previous year, which corresponded with the overall trend of shrinkage of China’s FDI.²⁴ Since 2020, and throughout the pandemic, China has continued to invest heavily across Africa, when annual investments soared again to \$4.2 billion.

Chinese investments in the African continent focus on a selective number of markets. Construction with 35 percent of total investments made up the largest share in 2020, followed closely by mining with 21 percent. Other sectors such as manufacturing, financial services, leasing and business services were supported to a lesser degree. Additionally, the beneficiaries are not equally distributed over the continent. Of all Chinese FDI in 2020, 63 percent was focused on only ten countries: South Africa, DRC, Zambia, Ethiopia, Angola, Nigeria, Kenya, Zimbabwe, Algeria, and Ghana. In stark contrast, this strong concentration of investment leaves only approximately \$380 million for each of the other recipients, a sum which averages at only half the sum amounting from loans.²⁵

²⁰ United Nations Conference on Trade and Development (UNCTAD): Handbook on Special Economic Zones in Africa. Towards Economic Diversification across the Continent 2021, https://unctad.org/system/files/official-document/diaeia2021d3_en.pdf, pp. 35-36.

²¹ United Nations Conference on Trade and Development (UNCTAD): Handbook on Special Economic Zones in Africa. Towards Economic Diversification across the Continent 2021, https://unctad.org/system/files/official-document/diaeia2021d3_en.pdf, p. 42.

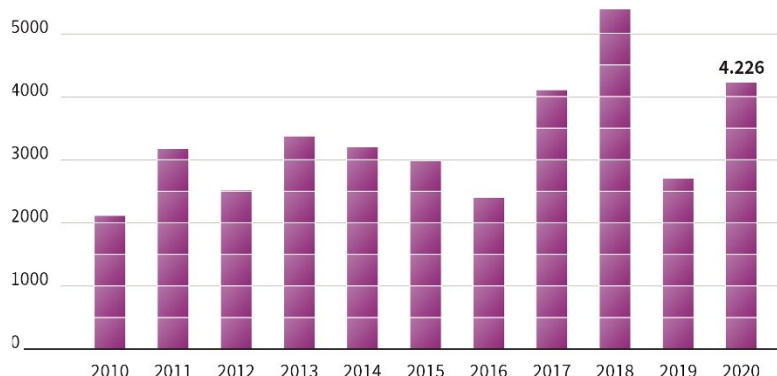
²² Rifaoui, Anass: Special Economic Zones in Africa (SEZs): Impact, efforts, and recommendations, January 18, 2021, accessed April 12, 2022, at <https://infomineo.com/special-economic-zones-in-africa-impact-efforts-and-recommendations/>.

²³ Meng, Guangwen, Sui, Nana and Wang, Xue: Construction and Development of the Zambia-China Economic and Trade Cooperation Zone, *Tropical Geography*, 2017, 37 (2): 246-257.

²⁴ Secretariat of the China-Africa Economic and Trade Expo (CAETE), ed.: China-Africa Economic and Trade Relationship Annual Report 2021, accessed April 10, 2022, at <https://res.caidev.org.cn/rc-upload-1636704478930-33-1636706776439.pdf>, p. 4.

²⁵ Fu, Yike: The Quiet China-Africa Revolution: Chinese Investment, *The Diplomat*, November 22, 2021, accessed March 17, 2022, <https://thediplomat.com/2021/11/the-quiet-china-africa-revolution-chinese-investment/>.

**Annual FDI flows from China to Africa
from 2010 to 2020 (in million U.S.\$,²⁶**



Source: UNCTAD
Chart: Schwowchow Visual Stories

The resurgence of Chinese FDI in Africa is a clear sign of Beijing's willingness to continue to shape Africa's landscape in the coming post-pandemic years. Indeed, projects involving minerals and raw materials are paving the way for investing in the African service sector, such as scientific research and technology services, transport, warehousing, and postal services.²⁷ At the same time, Chinese FDI flows reveal that Beijing still remains keen on investing in the infrastructure of African countries. Regarding infrastructure ambitions, Chinese and African interests overlap profoundly: Africa's large demand for modern infrastructure meets the enormous capacities of China's building companies and their hunger for giant projects such as airports, bridges, highways, railways and hospitals. China has, in fact, become the largest foreign investor in infrastructure in Africa.²⁸

Both China and its African partners seem to have recognized the necessity to upgrade their cooperations framework to make new investments more sustainable. In this context, the Eighth Ministerial Conference of the Forum on China-Africa Cooperation held in November 2021 in Dakar, Senegal, might become a new milestone in China's investment in Africa. In the key document "China-Africa Cooperation Vision 2035" adopted by the Conference based on the opening speech by President Xi Jinping, Beijing pledges to "invest another USD 60 billion in Africa by 2035, especially in support of African agriculture, manufacturing, infrastructure, environmental protection, digital economy, blue economy, etc".²⁹ The Chinese president promised to "upgrade [...] African railway, highway, shipping, port, airline and communications network" and to provide Africa with "quality infrastructure" as well as "new types of infrastructure" developing the digital economy to bridge the digital divide [between Africa and the world].³⁰

A glance at the map shows that China is investing heavily in coastal regions, with port projects taking center stage in the course of the BRI. Around 45 percent of all BRI projects concentrate on infrastructure, including ports. In total, China has invested in over 74 African ports. These include the ports in Dolareh, Damerjog and Tadjourah in Djibouti, Massawa in Eritrea, Port Sudan, the ports in Lamu and Mombasa in Kenya, among others. The most famous case is probably the port of Djibouti, where the People's Liberation Army (PLA) Navy built its first overseas military base, which has been in operation since 2017.

²⁶ Statista: Annual flow of foreign direct investments from China to Africa from 2010 to 2020, October 28, 2021, accessed April 10, 2022, at <https://www.statista.com/statistics/277985/cash-flow-of-chinese-direct-investments-in-africa/>.

²⁷ Mitchell, Jason: What will Africa's FDI environment look like in 2030? Ask China..., *Investment Monitor*, January 4, 2022, accessed April 9, 2022, at <https://www.investmentmonitor.ai/analysis/what-will-africas-fdi-environment-look-like-in-2030-ask-china>.

²⁸ Chen, Zhaoyuan: China-Africa cooperation upgraded, *China Daily*, December 25, 2021, accessed April 10, 2022, at <https://global.chinadaily.com.cn/a/202112/25/WS61c6692fa310cdd39bc7d6a8.html>.

²⁹ China-Africa Cooperation Vision 2035, accessed April 12, 2022, http://focac.org.cn/focacdakar/eng/hyqk_1/202112/20211210_10466585.htm.

³⁰ Ibid.

Chinese FDI flows to African countries 2015—2020

The map shows the flow of foreign direct investments from China to African countries between 2015 and 2020. Negative values indicate that outflows of investment exceed inflows.

Sum of US\$ mn, unadjusted

-500 0 3000

Ports with Chinese investment

Source: The Statistical Bulletin of China's Outward Foreign Direct Investment published by China's MOFCOM. The 2020 data is obtained from MOFCOM via the CEIC database; SAIS China-Africa Research Initiative; Map: C.Heidbrink (2022); Chart: Schwachow Visual Stories

In addition, China is investing in connectivity projects such as railroads (around 20 percent of BRI projects) to link landlocked mining and energy projects to the emerging railroad system.³¹ This investment focus is due to China's own development experience in building transportation networks that connect coastal regions and ports with inland or remote areas.³² In response, some Western observers have expressed fears that China could abuse its influence over these ports for its own strategic interests. This concerns both economic preferential treatment – such as the transport of raw materials, finished goods and labour – and military purposes by monitoring and blocking overseas and deep-sea traffic.³³

Despite these headwinds and concerns, the majority of Africans welcome Chinese engagement. According to polls carried out by Afrobarometer in 2021, 63 percent of Africans consider China's economic and political influence in their country to be positive. Only 14 percent consider it negative. Interestingly, the perceptions expressed about the influence of the USA in Africa are almost identical (60 percent vs. 13 percent).³⁴ The 2021 CMS survey also found that most African respondents (62 percent) were satisfied with the results of the BRI. A similar percentage of African participants aimed to maintain or increase their involvement in the BRI demonstrating a generally optimistic attitude. This may also be due to widely shared expectations that the development of new BRI projects may help to offset the impact of the pandemic. The virus has indeed had serious impacts on BRI projects, as reported by the Chinese Ministry of Foreign Affairs.³⁵ It has also shifted greater attention to the so-called Health Silk Road, which focuses on the supply of medical infrastructure, goods and services.

31 Lokanathan, Venkateswaran: China's Belt and Road Initiative: Implications in Africa, ORF Issue Brief No. 395, Observer Research Foundation, 2020, p.4., accessed March 24, 2022, https://www.orfonline.org/wp-content/uploads/2020/08/ORF_IssueBrief_395_BRI-Africa.pdf.

32 Weng, Lingfei, Xue, Lan, Sayer, Jeffrey, Riggs, Rebecca Anne, Langston, James Douglas and Boedhihartono, Agni Klintuni: Challenges faced by Chinese firms implementing the 'Belt and Road Initiative': Evidence from three railway projects, in: Research in Globalization, Vol. 3, 100074, 2021, p. 4.

33 Lokanathan, Venkateswaran: China's Belt and Road Initiative: Implications in Africa, ORF Issue Brief No. 395, Observer Research Foundation, 2020, p.4., accessed March 24, 2022, https://www.orfonline.org/wp-content/uploads/2020/08/ORF_IssueBrief_395_BRI-Africa.pdf.

34 Appiah-Nyamekye Sanny, Josephine and Selormey, Edem: Africans welcome China's influence but maintain democratic aspirations, Afrobarometer Dispatch, No. 489, November 15, 2021, accessed March 24, 2022, https://media.africaportal.org/documents/ad489-pap3-africans_welcome_chinas_influence_maintain_democratic_aspirations.pdf.

35 CMS Legal Services: Belt and Road Initiative. The view from Africa, 2021, p.2., accessed March 22, 2022, <https://cms.law/en/media/international/files/publications/publications/bri-view-from-africa?v=1>.

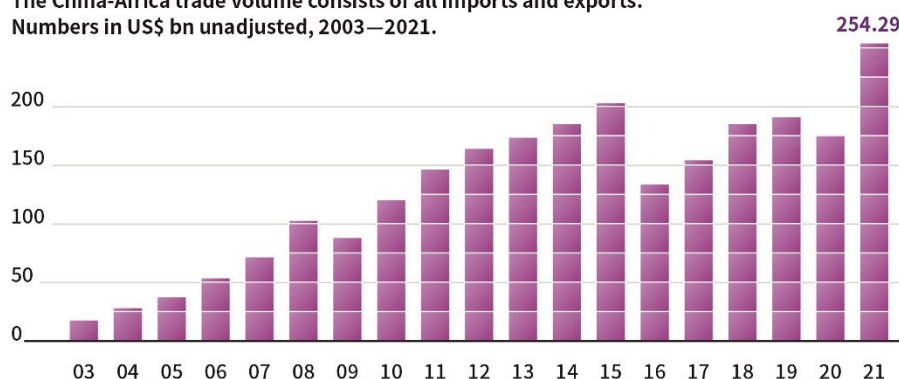
1.4 China-Africa Trade remains resilient but suffers from a constant imbalance of trade flows

Similar to FDI, China-Africa trade figures also show some irregularities. Bilateral trade initially peaked at \$203 billion in 2015 and then declined to \$133 billion in 2016. The recent 35 percent yearly increase in China-Africa trade to a record high of \$254 billion in 2021 should therefore be watched closely to assess whether it is a long-term trend or a flash in the pan. Nevertheless, this strong increase in trade volume is remarkable. Particularly since it is made up of an increase in both Chinese exports to Africa (29.9% per year) and imports from Africa (43.7% per year).

The top 10 African trading partners of China account for more than 66 percent of the trade volume between China and Africa. Topping the list is South Africa, which accounts for \$54 billion or 21 percent of total China-

China-Africa trade at record high

The China-Africa trade volume consists of all imports and exports.
Numbers in US\$ bn unadjusted, 2003–2021.



Source: Johns Hopkins China-Africa Research Initiative. General Administration of Customs PRC.
Figure generated by C. Heidbrink (2022). Chart: Schwowchow Visual Stories

Africa trade. It is followed at some distance by Nigeria and Angola. In contrast, only seven African countries recorded a decline in trade volumes, namely Central African Republic, Gabon, Sudan, Chad, Western Sahara, Sao Tome and Principe, and South Sudan. Nevertheless, while the Central African Republic was able to export 62 percent more goods to China, Sao Tome and Principe imported three times the volume of Chinese goods compared to the previous year. Both countries did not join the BRI until 2021, making future developments for these two countries interesting research cases.³⁶

In addition, asymmetries and shifts in trade flows and types of goods can be identified. In 2021, Africa recorded a trade deficit with China. Chinese exports amounted to \$148 billion, whereas China imported only \$105.92 billion worth of African goods. Accordingly, Chinese exports to Africa amounted to 58% of the trade volume in 2021.³⁷ This again marks a rebalance in comparison to the year before, when Chinese exports accounted for 65 percent of the trade volume. While imports and exports balanced each other throughout the 2000s, the share of Chinese exports to Africa has consistently outpaced its imports from the continent since 2012.

Top 10 African countries with the highest bilateral trade volume

In 2021, trade volume between China's top 10 trading partners in Africa accounts for more than 66 percent of total trade between China and the African continent.
Trade value in thousands of US\$.

| Country | Trade Value | Exports | Imports | Change y-o-y | Share of China-Africa Trade |
|----------------|-------------|------------|------------|--------------|-----------------------------|
| 1 South Africa | 54,347,220 | 21,119,650 | 33,227,570 | 50.7% | 21.4% |
| 2 Nigeria | 25,683,424 | 22,641,264 | 3,042,160 | 33.3% | 10.1% |
| 3 Angola | 23,343,642 | 2,493,080 | 20,850,561 | 41.4% | 9.2% |
| 4 Egypt | 19,973,398 | 18,266,614 | 1,706,783 | 37.3% | 7.9% |
| 5 DRC | 14,392,348 | 2,757,313 | 11,635,035 | 58.2% | 5.7% |
| 6 Ghana | 9,570,138 | 8,105,157 | 1,464,982 | 12.2% | 3.8% |
| 7 Algeria | 7,430,833 | 6,350,062 | 1,080,771 | 12.7% | 2.9% |
| 8 Kenya | 6,961,834 | 6,735,258 | 226,576 | 25.2% | 2.7% |
| 9 Tanzania | 6,744,521 | 6,138,957 | 605,564 | 47.1% | 2.7% |
| 10 Morocco | 6,513,496 | 5,689,529 | 823,967 | 36.6% | 2.6% |

Source: Johns Hopkins University; Table generated by C. Heidbrink (2022)
Chart: Schwowchow Visual Stories

³⁶ General Administration of Customs P.R. China: 2021 nian 12 yue jin chukou shangpin guo bie (diqu) zong zhi biao (meiyuan zhi) [Table of total value of import and export commodities by country (region) in December (U.S. dollar value)], January 18, 2022, accessed April 13, 2022, <http://www.customs.gov.cn/customs/302249/zfxgk/2799825/302274/302277/302276/4127455/index.html>.

³⁷ Ibid.

Since the figures have fluctuated widely over the course of the last two decades, they do not provide empirical evidence for systematically applied expansion strategy for Chinese exports. This expansion strategy is particularly assumed in the course of the BRI. However, especially after the establishment of the BRI, a decline in China's export share can be observed between 2015 and 2018, although it increased again thereafter.³⁸ Thus, the overarching fear that the African markets will be swamped with cheap Chinese imports has so far not been proven.³⁹ Whilst China mostly imports raw materials, its export to Africa consists mainly of value-added products. As a designated strategic partner, Nigeria exports minerals, oils, plastics, rubber, animal products, ships and fruits to China. In contrast, Chinese imports to Nigeria consist mainly of machinery, mechanical products, information and digital technologies and cell phones.⁴⁰ Due to the pandemic, China exported significantly more medical and health-related items in 2021, which can be referred to as the so-called Health Silk Road. Whether this represents a long-term trend needs to be further monitored in order to gauge the changing nature of BRI.



Source: General Administration of Customs PRC
Chart: Schwachow Visual Stories

1.5 BRI 2.0 changes income distribution among companies in favour of Africa

Gross annual revenues of Chinese companies' construction projects in the continent have declined since 2015, a sure sign that higher social standards and qualitative requirements of project operators for BRI 2.0 have diverted income towards local partners and away from Chinese corporations. In fact, their annual gross revenue from engineering and construction projects increased rapidly between 2000 and 2015. However, these revenues declined after the BRI was officially established. In 2015, the revenues totaled \$54.74 billion, and in 2020 \$38.15 billion. By global comparison, African projects account for the second-largest gross revenue of Chinese companies in engineering and construction projects.

Share of gross annual revenues of Chinese construction projects in 2020



Source: Johns Hopkins China-Africa Research Initiative. Figure generated by C. Heidbrink (2022).
Chart: Schwachow Visual Stories

38 John Hopkins University SAIS China-Africa Research Initiative: China's exports to African Countries, 2022, accessed March 17, 2022, <http://www.sais-cari.org/data-china-africa-trade>.

39 Devonshire-Ellis, Chris: China's Belt And Road Initiative Member Countries: Exports Up 28% In Three Years, Silk Road Briefing, November 11, 2020, accessed March 17, 2022, <https://www.silkroadbriefing.com/news/2020/11/10/chinas-belt-and-road-initiative-member-countries-exports-up-28-in-three-years/>.

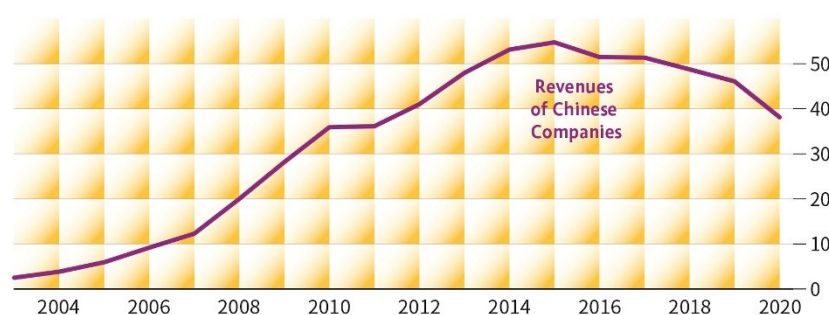
40 Devonshire-Ellis, Chris: China's 2021 Progress Across The African Belt & Road Initiative, Silk Road Briefing, January 12, 2021, accessed March 17, 2022, <https://www.silkroadbriefing.com/news/2021/01/12/chinas-2021-progress-across-the-african-belt-road-initiative/>.

However, neither Algeria, being the major source of revenues for Chinese companies in engineering and construction projects in 2020, nor Egypt, which placed third, are among the top 10 destinations of FDI since the establishment of the BRI. With FDI flows of \$553 million, Egypt is ranked 15th, whereas Algeria ranked 33rd out of 54 African countries with only \$43 million in FDI.

In 2020, for example, Africa's share was about 24.6 percent, while the share for Asia was 57.2 percent. Revenues from Europe (9.0 percent) and the Americas (6 percent) were far behind. However, a shift can be seen here as well: Asia has become increasingly important as a source of revenue for Chinese companies after 2015, while Africa's share has since fallen (in 2015, it still accounted for 35.6 percent of revenue) revealing the willingness of Chinese companies to cede more profits to their African partners in exchange for their tacit acceptance of BRI projects.

Revenues of Chinese companies

Revenues of Chinese companies measure the gross annual revenues of Chinese companies' engineering and construction projects in Africa. Revenues in billion US \$ unadjusted.



Source: Johns Hopkins China-Africa Research Initiative. Figure generated by C. Heidbrink (2022).
Chart: Schwachow Visual Stories

Interestingly, 7 out of 10 top destinations for Chinese FDI between 2015 and 2020 are also on the top 10 list of major revenue sources for Chinese companies, namely Nigeria, Kenya, Ethiopia, DRC, Zambia, Angola and Tanzania. Consequently, past investments generated revenue for Chinese companies, which are entrusted with the implementation of BRI projects. Previously, this pattern was also often seen as sham investments in the target countries, as the funds did not remain in the countries but were returned to China. Since the start of BRI in 2015, this business model seems to diminish.⁴¹

Top 10 destinations in Africa

of aggregated Chinese FDI flows between 2015 and 2020 (inflows and outflows combined)

| Country | FDI Flows in US\$ mn unadjusted |
|--------------|---------------------------------|
| South Africa | 2,775 |
| DRC | 2,661 |
| Ethiopia | 1,666 |
| Angola | 1,639 |
| Kenya | 1,594 |
| Zambia | 1,502 |
| Ghana | 983 |
| Nigeria | 924 |
| Uganda | 873 |
| Tanzania | 854 |

Generating Gross Annual Rev. of Chinese Companies, Construction Projects in 2020

| Country | Revenues in US\$ mn unadjusted |
|----------|--------------------------------|
| Algeria | 4,688 |
| Nigeria | 3,510 |
| Egypt | 2,933 |
| Kenya | 2,957 |
| Ethiopia | 2,925 |
| DRC | 2,025 |
| Zambia | 2,022 |
| Guinea | 1,778 |
| Angola | 1,515 |
| Tanzania | 1,456 |

Source: Johns Hopkins University, Table: C. Heidbrink
Chart: Schwachow Visual Stories

41 John Hopkins University SAIS China-Africa Research Initiative: Chinese FDI Stock in African Countries, 2022, accessed March 17, 2022, <http://www.sais-cari.org/chinese-investment-in-africa>; John Hopkins University SAIS China-Africa Research Initiative: China's exports to African Countries, 2022, accessed March 17, 2022, <http://www.sais-cari.org/data-china-africa-trade>; John Hopkins University SAIS China-Africa Research Initiative: Number of Chinese workers in Africa by the end of the year (includes both concentrated projects and labor services), 2022, accessed March 17, 2022, <http://www.sais-cari.org/data-chinese-workers-in-africa>.

1.6 China is a champion of “debt relief” rather than a suspect of “debt-trap-diplomacy”

Indeed, China’s rising FDI in Africa faces increasing risks and challenges. Especially, American analysts see huge problems obscured by African governments and state-owned enterprises. The China-Africa Research Initiative report presented by the Johns Hopkins School of Advanced International Studies (SAIS) reveals that the Chinese financiers have signed 1,141 loan commitments worth \$153 billion with African governments and state-owned enterprises.⁴² According to their investigations, some African countries are suspending or scrutinizing contracts with Chinese firms, most of which belong to the BRI, because they are unable to repay their loans.⁴³ These developments triggered discussion about the so-called “debt trap” into which China allegedly lures other countries for political reasons. Empirical evidence shows that Chinese actors were repeatedly required to renegotiate initial conditions resulting in debt relief. Beijing has granted at least \$12.1 billion in global debt relief to several countries in 2020 and 2021. Among those officially confirmed were a \$378 million debt cancellation for Kenya and a \$110 million debt relief for Zambia.⁴⁴

Considering the actual situation of African countries, China has made nine commitments to cancel the debts of borrowing countries since 2000. For countries that have failed to pay their debts in a timely manner, China has offered a variety of debt restructuring options to help African countries tide over their difficulties, rather than using asset seizures and other means to require borrowers to pay off their debts.

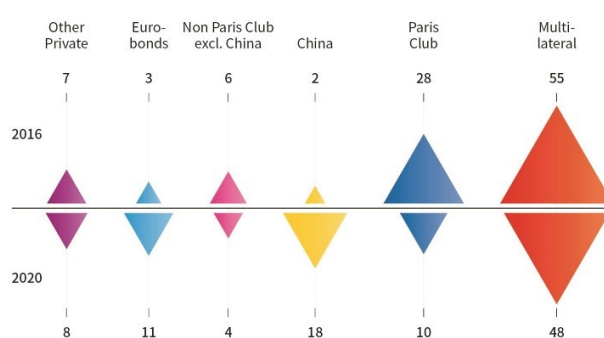
The China Africa Research Initiative at John Hopkins University finds that China has restructured or refinanced about \$15 billion of African debt between 2000 and 2019, without the “asset seizures” that countries like the United States have criticized them for as part of “debt trap” suspicions. While some contractual provisions call for arbitration against the borrowing country in the event of failure to repay the debt in a timely manner, there is no evidence that China has actually resorted to court enforcement of payments or the use of penalty rates.⁴⁵

Debt restructuring cases show a wide range of treatments⁴⁵

| Treatment | Cases |
|---|--|
| Reprofiling of debt service payments within original maturity | Mozambique (2017) Cameroon (2019) |
| Short Maturity Extensions (e.g. 3–7 years) | Cameroon (2002) Zimbabwe (2007, 2010, 2012) Niger (2018) |
| Longer Maturity Extensions (e.g. 10–20 years) | Ethiopia (2018) |
| Maturity Extension and Interest Rate Reduction | Zimbabwe (2003, 2004) Seychelles (2011) |
| Specific Details Unknown | Benin (2004) Sudan (2012) Chad (2017) |

Following the outbreak of the COVID-19 pandemic, the World Bank and the International Monetary Fund urged the G20 to establish a Debt Service Standstill Initiative (DSSI). Since its entry into force in May 2020, 48 countries eligible for the debt moratorium, most of them in Africa, have participated in the initiative before it expired at the end of December 2021.⁴⁶

Composition of external obligations for DSSI countries



Source: IMF, 2022
Chart: Schwachow Visual Stories

42 China Africa Research Initiative: Loan Data, accessed April 11, 2022, at <http://www.sais-cari.org/data>.

43 International Institute for Sustainable Development (IISD): Chinese Investment in Africa Rises as Project Values and Bilateral Trade Decline, October 25, 2021, accessed April 11, 2022, at <https://www.iisd.org/articles/chinese-investment-africa-bilateral-trade-decline#:~:text=Johns%20Hopkins%20University%20School%20of,governments%20and%20state%20Downed%20enterprises>.

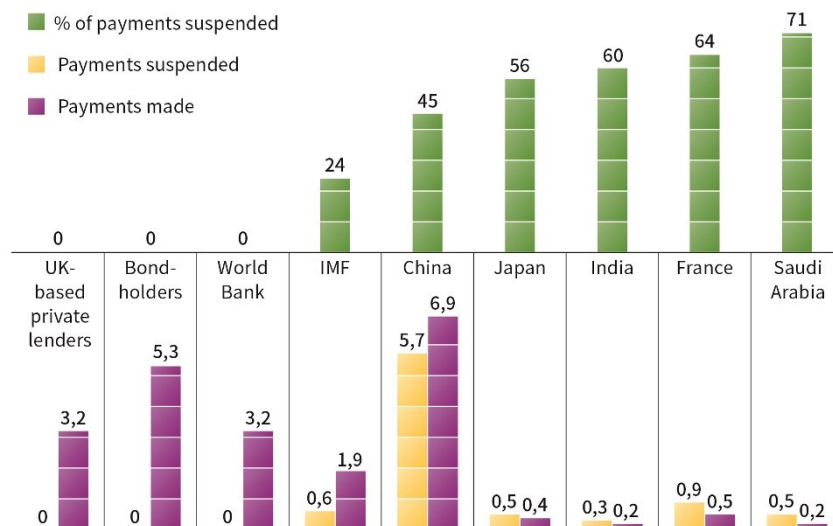
44 Nyabiage, Jevans: Chinese lenders ‘reluctant’ to offer African countries further debt relief, South China Morning Post, September 20, 2021, accessed March 23, 2022, <https://www.scmp.com/news/china/diplomacy/article/3149314/chinese-lenders-reluctant-offer-african-countries-further-debt>.

45 SAIS-CARI: Debt Relief with Chinese Characteristics, 2020, accessed April 20, 2022, <https://static1.squarespace.com/static/5652847de4b033f56d2bdc29/t/60353345259d4448e01a37d8/1614099270470/WP+39+-+Acker%2C+Brutigam%2C+Huang+-+Debt+Relief.pdf>

46 World Bank: Debt Service Suspension Initiative, 2022, accessed April 21th, 2022, <https://www.worldbank.org/en/topic/debt/brief/covid-19-debt-service-suspension-initiative>

The DSSI countries have dealt with a diversity of creditors over the past decades. Overall, borrowing has been mainly from China, Paris Club official creditors, private banks and multilateral institutions. From 2016 to 2020, the share of DSSI countries borrowing from China rose from 2 to 18 percent, the share of European private creditors increased from 3 to 11 percent, and the share of external debt owed to Paris Club creditors decreased from 28 to 10 percent.⁴⁷

Debt payments and suspension by selected creditors for the 46 countries applying

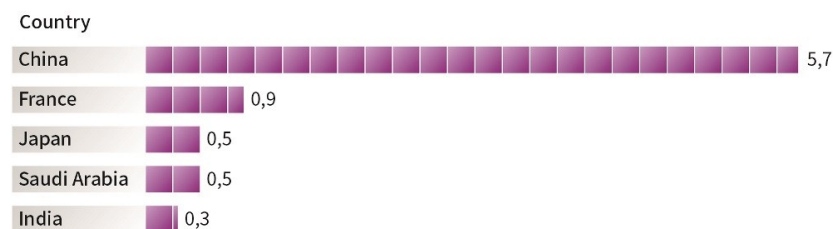


Source: Johns Hopkins China-Africa Research Initiative, General Administration of Customs PRC.
Figures generated by Xiaojun Ke. Chart: Schwachow Visual Stories

It is worth noting that China, with 18 percent of the total share of external debt, became the most significant debt relief provider of this initiative. It suspended \$5.7 billion in debt payments, contributing to more than half of the total global debt moratorium. As a result, 45 percent of debts owned by the poorest countries to China was suspended. In contrast, as the following two figures show, the U.K. offered no suspension of payments on its commercial loans and recovered \$3.2 billion in debt from countries that applied for the debt standstill initiative.⁴⁸

Most important creditors suspending payments in DSSI

in US\$ Billion



Source: JUBILEE DEBT CAMPAIGN, 2021
Chart: Schwachow Visual Stories

47 IMF: Restructuring Debt of Poorer Nations Requires More Efficient Coordination, 2022, accessed April 21th, 2022, <https://blogs.imf.org/2022/04/07/restructuring-debt-of-poorer-nations-requires-more-efficient-coordination/#>

48 JUBILEE DEBT CAMPAIGN: How the G20 debt suspension initiative benefits private lenders, 2021, accessed April 21th, 2022, https://jubileedebt.org.uk/wp-content/uploads/2021/10/How-the-G20-debt-suspension-initiative-benefits-private-lenders_10.21.pdf

◆ HEALTH, VACCINES & MEDICINE

2. HEALTH, VACCINES & MEDICINE

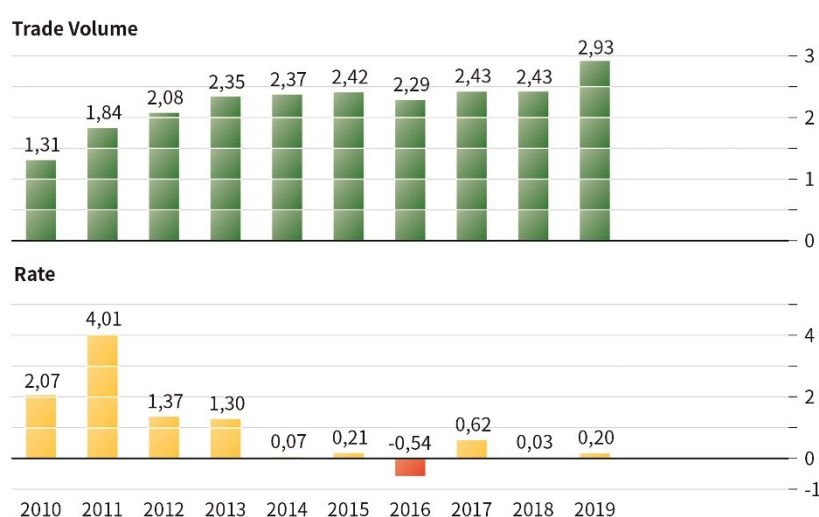
2.1 COVID-19 Pandemic is accelerating the expansion of “Health Silk Road” to Africa

Indeed, our current research findings partly confirm the assumption that the rapid increase of China-Africa trade in 2021 stays in close connection with the outbreak of the pandemic, intensifying the advancement of the “Health Silk Road” – an integral component of the BRI 2.0 – in Africa. Statistical analysis reveals that the COVID-19 Pandemic has caused strong demands from African countries for Chinese medical and pharmaceutical products, which in turn has driven bilateral trade to a record high.

Prior to the COVID-19 outbreak, the China-Africa pharmaceutical trade did not show a significant trend of increase or decrease. As the figure below indicates, from 2010 to 2019, the years before the outbreak, there was a steady and slowly increasing trend. When combined with the growth rate, it is a curve that fluctuates up and down.⁴⁹

The demand for pharmaceutical products, an immediate need in the fight against the pandemic, will amplify in the short to medium term. According to a report released by the United Nations Economic Commission to Africa (UNECA), African countries will see an increase of \$10.6 billion in medical spending due to the need to combat the COVID-19 pandemic.

China-Africa pharmaceutical trade volume, 2010–2019



Source: Analysis “Big Year” of Zhang, 2020
Chart: Schwowchow Visual Stories

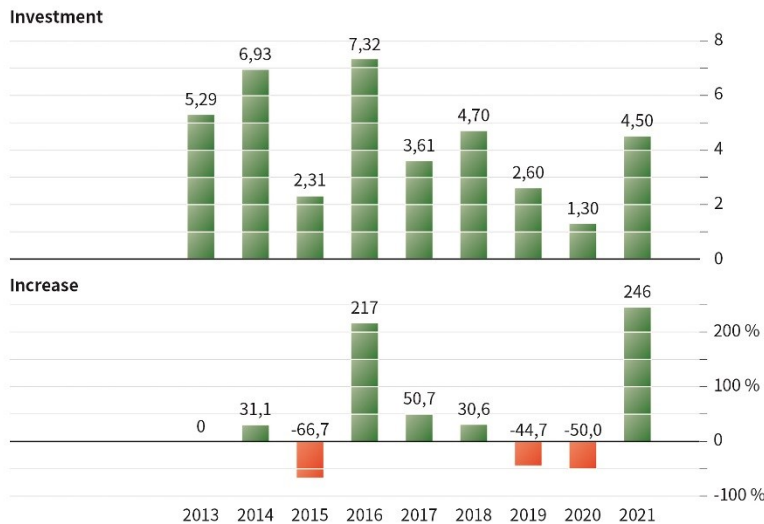
In addition, the international community's assistance to Africa in fighting the pandemic has, to a certain extent, led to an increase in the capacity of the public procurement market for Africa, including personal protection, diagnostic reagents and other products.⁵⁰ In this international environment, medical cooperation and pharmaceutical trade in the BRI 2.0 period have proliferated significantly during a short time period.⁵¹ This is shown in the figure below. However, it remains unclear whether this trend will continue in the long term.

49 Zhang, Xiaohui, “Big Year” for China and Africa Medical Cooperation: Five key points of “turning crisis into opportunity” (中非 “大年” 医药攻略 “化危为机” 五个关键点) December 2020, accessed April 8th, 2022, http://www.yyjib.com.cn/yyjib/202012/202012071633583358_9276.shtml

50 Ibid.

51 GREEN FINANCE & DEVELOPMENT CENTER: Brief: China Belt and Road Initiative (BRI) Investment Report 2021, 2022, accessed April 6th, 2022, <https://greenfdc.org/brief-china-belt-and-road-initiative-bri-investment-report-2021/>

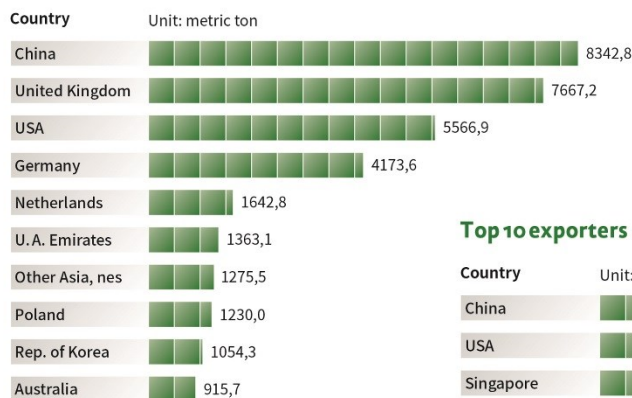
Growth/decline of BRI engagement in health, 2013–2021



Source: Analysis "Big Year" of Zhang, 2020
Chart: Schwachow Visual Stories

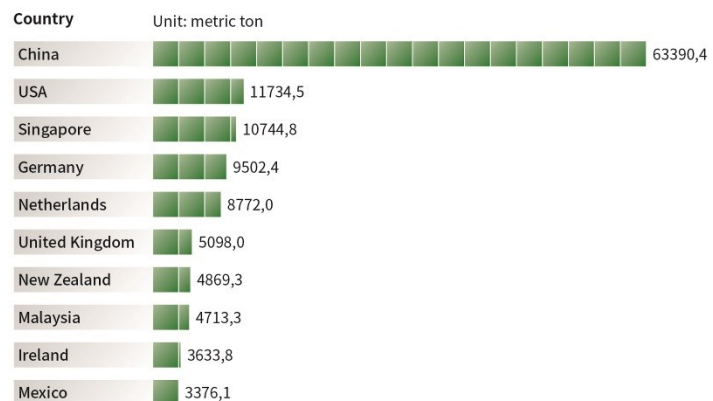
As the country where the COVID-19 pandemic first broke out, China is also the world's leading producer of protective medical gear such as masks. Its experience and production capacity in pandemic prevention and containment can have a significant impact on the effectiveness of the global response to the COVID-19 pandemic, especially in Africa, where medical resources have been lacking. The following figures show China's exports of medical and pandemic prevention/containment supplies worldwide in 2020 and 2021 and reveal that China is the largest exporter of masks, respirators and vaccines.^{52, 53}

Top 10 exporters of masks, 2020



Source: UN Comtrade 2020
Chart: Schwachow Visual Stories

Top 10 exporters of therapeutic respirators, 2020



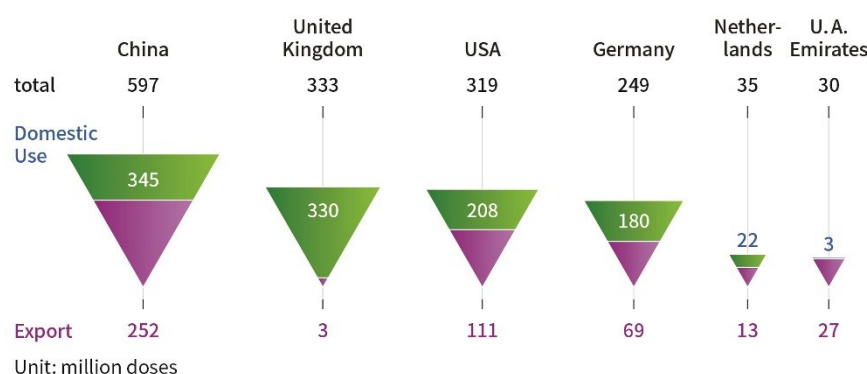
Source: UN Comtrade 2020
Chart: Schwachow Visual Stories

52 UN: UN Comtrade Database. Export data at country level, 2022, accessed April 9th, 2022, <https://comtrade.un.org/data>

53 The Institute of Boao Forum for Asia, Renmin University of China: Launch of Report on the Global Use of COVID-19 Vaccines, 2021, accessed April 9th, 2022, <http://www.199it.com/archives/1290645.html>

◆ HEALTH, VACCINES & MEDICINE

Number of domestic use and exports of COVID-19 vaccines in relevant countries as of May 2021



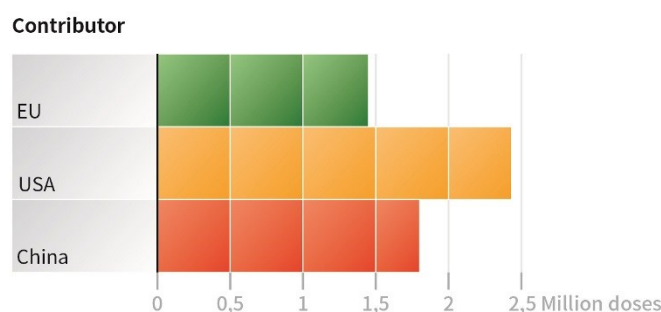
Source: Source: Institute of Boao Forum for Asia, 2021; UN Comtrade, 2020
Chart: Schwochow Visual Stories

2.2 China's timely and extensive provision of COVID-19 vaccines to Africa

There has been both overt and covert competition between China, the United States and the European Union for gaining influence in Africa's fight against the pandemic since 2020. Up to the beginning of 2022, more than 180 million doses of COVID-19 vaccine were delivered by China to 53 African countries and the African Union Commission (AUC).⁵⁴ In December 2021, Xi Jinping pledged to provide an additional one billion doses of Covid-19 vaccines to Africa in the form of donations or support for local production.⁵⁵

At a later stage, but quite energetically, the United States launched its gigantic campaign to support the African continent to stop the spread of COVID-19. Starting in May 2021, the country delivered 243 million vaccine doses to Africa and committed to donate at least 1.1 billion doses of COVID-19 vaccines for global use by 2023.⁵⁶ In contrast, the European Union provided €100 million in humanitarian support for COVID-19 vaccinations in Africa. It also shared 145 million doses of vaccines with Africa and contributed €425 million (\$469 million) to the COVAX facility.⁵⁷

COVID-19 vaccine assistance to Africa by U.S., China, and EU



Source: EU: Support package for the COVID-19 vaccination rollout in Africa
Chart: Schwochow Visual Stories

⁵⁴ Zhang, Hong: Chinese vaccines, bringing hope to Africa (中国疫苗, 给非洲带来希望), accessed March 31st, 2022, <http://health.people.com.cn/n1/2022/0106/c14739-32325083.html>

⁵⁵ Rédaction: China promises to help Africa fight Covid 19, accessed March 31st, 2022, <https://www.africanews.com/2021/12/01/china-promises-to-help-africa-fight-covid-19/>

⁵⁶ KFF: U.S. International COVID-19 Vaccine Donations Tracker – Updated as of March 30, accessed March 31st, 2022, <https://www.kff.org/coronavirus-covid-19/issue-brief/u-s-international-covid-19-vaccine-donations-tracker/>

⁵⁷ EU: Support package for the COVID-19 vaccination rollout in Africa, accessed March 31st, 2022, https://ec.europa.eu/echo/where/africa/support-package-covid-19-vaccination-rollout-africa_en

Firm competition among the top three assistance providers has also emerged in the domain of anti-pandemic materials. China has provided African countries with more than 120 batches of testing reagents and respirators among others. Its assistance in vaccines has reached 50 African countries and the AU. In addition, the country has sent medical experts to 17 African countries supporting local medics to do their job more effectively based on Chinese experiences.⁵⁸

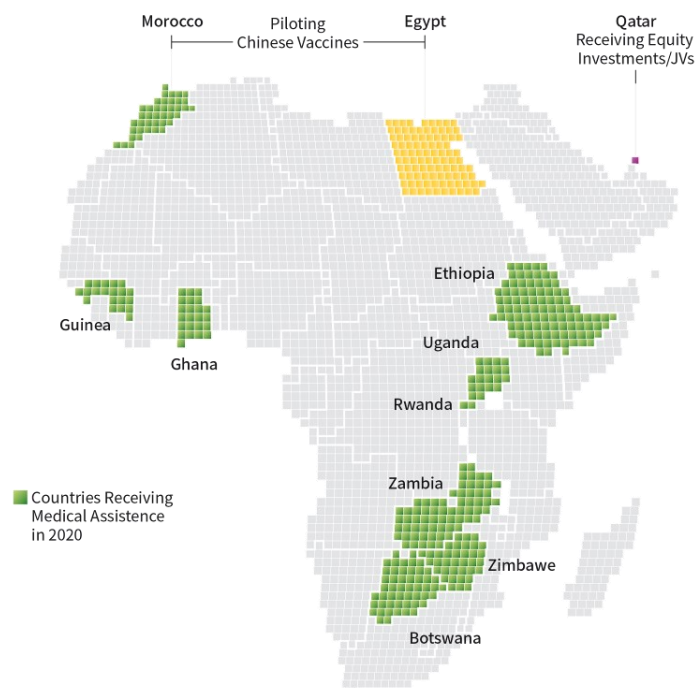
Despite being stressed by its own daunting domestic situation, the United States managed to donate up to 1,000 respiratory ventilators and accompanying equipment to South Africa to assist its national response to COVID-19. The value of the ventilator equipment alone was \$14 million, and the accompanying equipment, service programs and transportation totalled more than \$20 million in U.S. government assistance.⁵⁹

The European Union's assistance has focused on East Africa. €261 million (\$288 million) from development funding is being redirected to support the immediate healthcare response, and €475 million (\$524 million) will help mitigate the economic and social consequences of COVID-19. More than €11 million of humanitarian funding has also been allocated to the region to support the control and prevention of the pandemic, and to help vulnerable populations gain access to health care, water and sanitation.⁶⁰

2.3 Chinese equity investment approach – Africa's healthcare sector as a new niche market

China seems to have invested more than its competitors in Africa's healthcare sector. Along with the COVID-19 outbreak, Chinese healthcare investments in Africa has grown significantly between the third quarter of 2019 and the third quarter of 2020. A similar advance by the U.S. and the EU is absent insofar as available research shows. The chart below depicting a map of Africa shows the countries that received Chinese equity investments and joint ventures in healthcare sectors.⁶¹ Accordingly, Chinese equity investors have shown strong interest in countries in South-East Africa: from Ethiopia and Uganda to Zimbabwe and Botswana.

Chinese outbound healthcare investments/partners in and near Africa



Source: SIIS, 2021
Chart: Schwachow Visual Stories

58 Zhang, Jiaxing: A set of figures to understand China's international anti-pandemic assistance (一组数字读懂中国国际抗疫援助), accessed March 31st, 2022, http://stdaily.com/index/kejixinwen/2021-10/26/content_1228365.shtml

59 USAID: THE U.S. GOVERNMENT'S COVID-19 RESPONSE IN SUB-SAHARAN AFRICA, accessed March 31st, 2022, <https://www.usaid.gov/africa/documents/us-governments-covid-19-response-sub-saharan-africa>

60 EU: EU COVID-19 response for East Africa: first shipment of medical supplies arrives in Ethiopia, accessed March 31st, 2022, https://ec.europa.eu/international-partnerships/news/eu-covid-19-response-east-africa-first-shipment-medical-supplies-arrives-ethiopia_en

61 SIIS: Health Silk Road 2020: A Bridge to the Future of Health for All, 2021, accessed April 7th, 2022, <https://research.hktdc.com/en/article/NzU0NzY0NDA4>

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One of the crucial characteristics making China's assistance to Africa distinct from that of the United States and the European Union is what the German think tank SWP calls "combined assistance". In the framework of the BRI, China has provided almost all African countries with a combination of different medical supplies such as masks, test kits, respirators, and various forms of assistance such as medical teams and financial assistance to fight against COVID-19.⁶²

Furthermore, 31 African countries have been receiving medical aid in addition to the "combined assistance types" listed in the table below. Most of these aids are provided based on specific demands of the recipients, mostly in form of medical expert teams and/or financial assistance.

BRI cooperation agreements in Africa in 2021: Recipients of Chinese aid combinations⁶²

| Aid Combination | One Type of Aid (3 countries) | Two Types of Aid (20 countries) | Three Types of Aid (26 countries) |
|-----------------|---------------------------------|---|--|
| Countries Names | Djibouti Eritrea Eswatini | Botswana Burkina Faso Burundi Central African Republic Chad Democratic Republic of the Congo EQ. Guinea Gabon Guinea Libya Malawi Mali Mozambique Niger Rep. of Congo Rwanda Senegal Sudan The Gambia Zambia | Algeria Angola Benin Cameroon Côte D'Ivoire Egypt Ethiopia Ghana Guinea-Bissau Kenya Lesotho Madagascar Mali Mauritania Morocco Namibia Nigeria Senegal Sierra Leone Somalia South Africa South Sudan Tanzania Uganda Western Sahara Zimbabwe |

Recipients of special Chinese aid in 2021⁶²

| Teams of Medical Experts (21 countries) | Financial Aid (10 countries) |
|---|--|
| Algeria Angola Burkina Faso Central African Republic Comoros Côte D'Ivoire Democratic Republic of the Congo Djibouti Ethiopia EQ. Guinea Guinea Lesotho Niger Nigeria Rep. of Congo Sao Tome and Principe Sierra Leone South Sudan The Gambia Zimbabwe | Cape Verde Kenya Lesotho Niger Nigeria Rep. of Congo Rwanda Senegal South Africa Uganda |

Several African countries have received comprehensive medical assistance surpassing the supporting activities included in "combined services", medical expert teams or financial aid. Most of them have long been traditional partners of China's medical research institutions and hospitals located in different provinces in China.

Countries receiving comprehensive medical aid and cooperation

| Countries Receiving Comprehensive Medical Assistance (9 countries) | Countries Piloting Chinese Vaccines (2 countries) |
|--|---|
| Botswana Ethiopia Ghana Guinea Morocco Rwanda Uganda Zambia Zimbabwe | Egypt Morocco |

Source: SIIS, 2021. Table by Xiaojun Ke

⁶² SWP Comment: China's Health Diplomacy during Covid-19, 2021, accessed April 7th, 2022, https://www.swp-berlin.org/publications/products/comments/2021C09_ChinaHealthDiplomacy.pdf

3. SECURITY, ENERGY AND TECHNOLOGY

3.1 China is making vigorous efforts to present itself as a reliable security provider

China's security engagement in Africa is mostly known for its activities in Djibouti. In 2017, China established its first, and so far only overseas military base in this eastern African country. According to the Wall Street Journal, China is also going to position a permanent military installation in the Central African country of Equatorial Guinea.⁶³ However, Chinese military experts long refuted this claim and pointed out that “the U.S. regularly discloses information on China building an overseas military base” in order to hype the “China threat”.⁶⁴

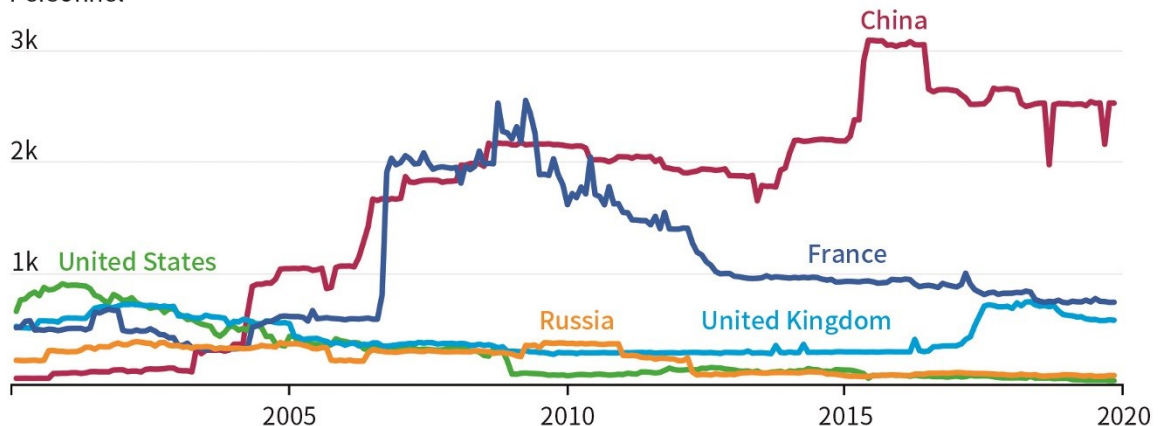
The military base is not the only sign of increasing Chinese security and military engagement in Africa. Indeed, UN peacekeeping operations serve as the most important tool to expand Chinese military cooperation with African countries. However, despite the country's first engagement with UN peacekeeping operations starting at the end of 1990 in Cambodia, throughout the 1990s, China remained reluctant, if not skeptical, to any overseas military commitments. The principle of “no-intervention” had been considered “sacred” for decades. But with its entry into the WTO in 2001, Beijing has overhauled its policy, introducing an active “military diplomacy”. As a result of this policy change, China has successfully transferred itself from a fierce opponent to an active contributor to UN peacekeeping operations.

For more than two decades, China has participated in numerous multilateral peacekeeping missions in Africa, such as 2003 in Liberia (UNMIL) and the Democratic Republic of Congo (MONUC), 2012 in South Sudan (UNMISS), 2013 in Mali (MINUSMA), and 2021 in Darfur (UNAMID). The participation in UN Peacekeeping in Africa offers China not only a legal means to safeguard its massive investments in Africa and enhance its international reputation as a benevolent rising superpower, but also helps the People's Liberation Army (PLA) to obtain military skills and operational experience.⁶⁵ Tom Bayes reports that “China's deployed peacekeepers [for the United Nations] have increased from 52 in 2000 to 2437 in July 2019”.⁶⁶ These changes are visualized in the figure below.

Peacekeeper contributions, UNSC P5

2000 — 2020

Personnel



63 Phillips, Michael M.: China Seeks First Military Base on Africa's Atlantic Coast, U.S. Intelligence Finds, The Wall Street Journal, December 5, 2021, accessed April 5, 2022, at <https://www.wsj.com/articles/china-seeks-first-military-base-on-africas-atlantic-coast-u-s-intelligence-finds-11638726327>.

64 Guo, Yuandan: WSJ report on China's military base on Africa's Atlantic coast 'not true,' says Chinese military expert, Global Times, December 6, 2021, accessed April 5, 2022, at <https://www.globaltimes.cn/page/202112/1240819.shtml>.

65 Dyrenforth, Thomas: Beijing's Blue Helmets: What to Make of China's Role in UN Peacekeeping in Africa, Modern War Institute, August 19, 2021, accessed April 10, 2022, at <https://mwi.usma.edu/beijings-blue-helmets-what-to-make-of-chinas-role-in-un-peacekeeping-in-africa/>.

66 Bayes, Tom: China's growing security role in Africa: Views from West Africa, Implications for Europe, pp. 45-46, online publication by Merics and KAS, accessed April 2, 2022, https://uni-bonn.sciebo.de/apps/files_pdfviewer/?file=%2Fremot...hinas%2520growing%2520security%2520role%2520in%2520Africa.pdf.

◆ SECURITY, ENERGY & TECHNOLOGY

Of the Five Permanent Members of the UN Security Council (P5), China has become the biggest contributor to military observers, inspectors, police operations as well as peacekeeping troops by order of the UN. According to Bayes, the diversity of its personnel contributions includes the medical, engineering, police, and combat units as well as helicopter units. In terms of financial support for the UNPKOs, China ranks second only to the U.S., contributing 15.21 percent of the total, compared to 27.89 percent from the U.S. and an aggregated 23.85 percent sent from the EU member states.⁶⁷

In addition, as Beijing strongly promotes its BRI in Africa, China's proactive engagement with UN peacekeeping operations opens new avenues to facilitate its security cooperation with participating African countries.⁶⁸ Implementing large-scale infrastructure projects depends on safety and stability, which motivates both China and African countries to upgrade their military engagement. Indeed, China is seeking to increase its military cooperation with African countries by creating connections between the UN and regional organizations. In 2021, China's Foreign Minister Wang Yi called for the UN to "help Africa improve its dependent capabilities for peacekeeping", to do more to help African countries in reducing conflicts in Africa and to set up a standing army to deal with crises.⁶⁹ Beijing is wielding its influence in the UN to safeguard its investments in BRI projects in Africa. Thus, active participation in multilateral peacekeeping operations in Africa is generating profound windfalls for BRI projects. At the same time, BRI serves as a new approach to increase Chinese involvement in African security.⁷⁰ Unlike France and the US, who maintain a large overt troop presence in Africa, China tends to integrate military cooperation into its economic relations with African countries.⁷¹

3.2 China: Less focus on African mining than the United States

It has been widely purported that China's investment in Africa is much more ecologically harmful than that of Western countries because the "World's Factory", driven by its hunger for raw materials and minerals, has shown disproportional interest to invest in mining industries. Since China is "unable to meet its annual demand for copper, zinc, nickel and a range of other raw materials", as the Institute of Developing Economies of Japan asserted, it "is now the prime driver of world mineral prices and a number of African countries have become key beneficiaries of this process".⁷²

A differentiated inquiry into the subject shows, however, that China is not the only one with mining investments in Africa. To a certain degree, the intensity of engagement with African mining industries by Western countries is often much stronger than that of China. This is at least true in the case of the United States. A systematic comparison of the composition of Chinese and American investments in Africa during recent years reveals a disproportionate share of the mining industry in the U.S. investment portfolio, in comparison to which even the massive investment of Chinese companies in African mining areas appears moderate.

The BRI has had a significant impact on the promotion of Chinese investment in various industries in Africa. After the BRI was launched, China's investment in Africa grew from \$26.19 billion to \$43.4 billion between 2013 and 2020. Construction, mining, and manufacturing maintained the top three shares of Chinese investment in Africa during this seven-year period.^{73,74}

67 Bayes, Tom: China's growing security role in Africa: Views from West Africa, Implications for Europe, pp. 45-46, online publication by Merics and KAS, accessed April 2, 2022, https://uni-bonn.sciebo.de/apps/files_pdfviewer/?file=%2Fremot...hinas%2520growing%2520security%2520role%2520in%2520Africa.pdf.

68 Herbert, Natalie: China's Belt and Road Initiative invests in African infrastructure — and African military and police forces, The Washington Post, April 30, 2021,

69 Zhang, Rachel: China urges UN to support African peacekeeping efforts, South China Morning Post, April 20, 2021, accessed April 8, 2022, at <https://www.scmp.com/news/china/diplomacy/article/3130300/china-urges-un-support-african-peacekeeping-efforts>.

70 Ministry of Foreign Affairs of the People's Republic of China: Report by State Councilor and Foreign Minister Wang Yi At the Eighth Ministerial Conference of the Forum on China-Africa Cooperation, December 6, 2021, accessed April 6, 2022, at http://focac.org.cn/focacdakar/eng/zxyw_1/202112/t20211206_10462843.htm.

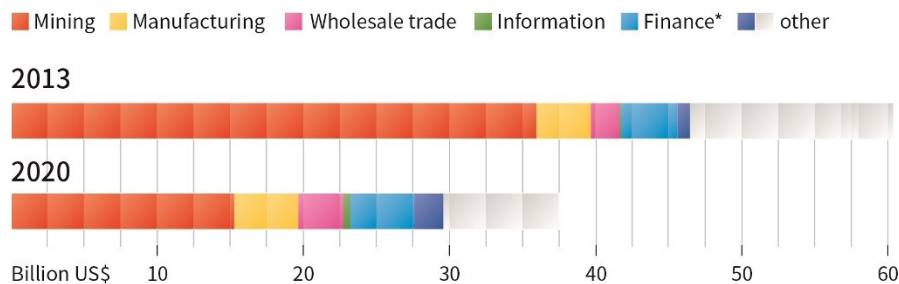
71 Tanchum, Michaël: China's new military base in Africa: What it means for Europe and America, European Council on Foreign Relations, December 14, 2021, accessed April 6, 2022, at <https://ecfr.eu/article/chinas-new-military-base-in-africa-what-it-means-for-europe-and-america/>.

72 Institute of Developing Economies (IDE): China in Africa: Capital 8 "China's Mining Footprint in Africa", accessed April 12, 2022, https://www.ide.go.jp/English/Data/Africa_file/Manualreport/cia_08.html.

73 Ministry of Commerce of the People's Republic of China: Report on Development of China's Outward Investment and Economic Cooperation, 2021, accessed April 8th, 2022, <http://www.gov.cn/xinwen/2021-09/29/5639984/files/a3015be4dc1f45458513ab39691d37dd.pdf>

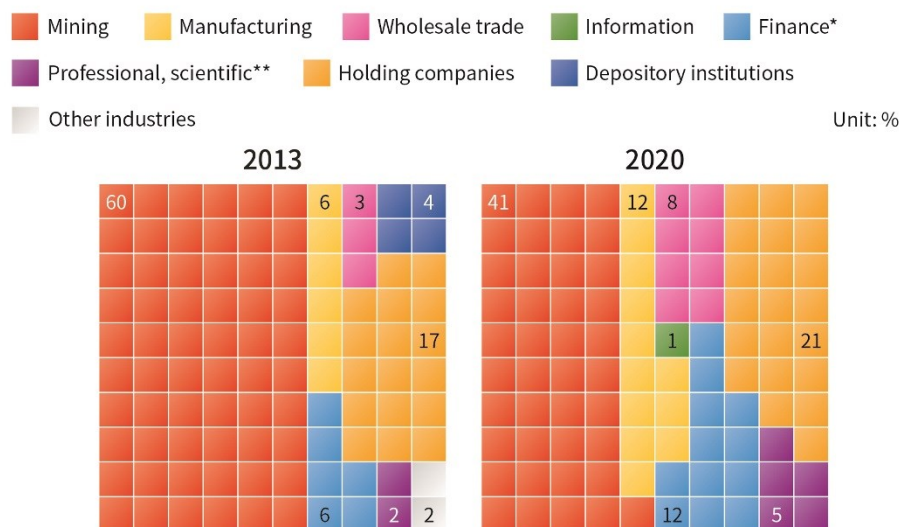
74 Ministry of Commerce of the People's Republic of China: Report on Development of China's Outward Investment and Economic Cooperation, 2014, accessed April 8th, 2022, <http://fec.mofcom.gov.cn/article/tzhzcj/tzhz/upload/duwaitoutizehuofazhanbaogao2014.pdf>

Composition of U.S. foreign direct investment in Africa by industry



*(except depository institutions) and insurance
Bureau of Economic Analysis (BEA), U. S. Department of Commerce (2021).
Figure generated by Xiaojun Ke (2022). Chart: Schwowchow Visual Stories

Composition of U.S. foreign direct investment in Africa by industry



*(except depository institutions) and insurance, ** and technical service
Bureau of Economic Analysis (BEA), U. S. Department of Commerce (2021).
Figure generated by Xiaojun Ke (2022). Chart: Schwowchow Visual Stories

During the same period, U.S. investment in Africa declined from \$60.42 billion in 2013 to \$47.5 billion in 2020. The significant reduction of total investment over this seven-year period was accompanied by a decline in investment in the mining sector from 60 percent to 41 percent. However, U.S. investment in Africa's mining sector remained the most dominant category of U.S. investment in Africa in 2020, accounting for 41 percent of total investment, twice as large as China's proportion of 21 percent over the same period.^{75,76} The following graphics visualize the changes in investment proportions.

75 BEA: Direct Investment by Country and Industry, 2020,2021, accessed April 8th, 2022, <https://www.bea.gov/sites/default/files/2021-07/dici0721.pdf>

76 BEA: Direct Investment Positions for 2013 - Country and Industry Detail, 2014, accessed April 8th, 2022, https://apps.bea.gov/scb/pdf/2014/07%20July/0714_direct_investment_positions.pdf

◆ SECURITY, ENERGY & TECHNOLOGY

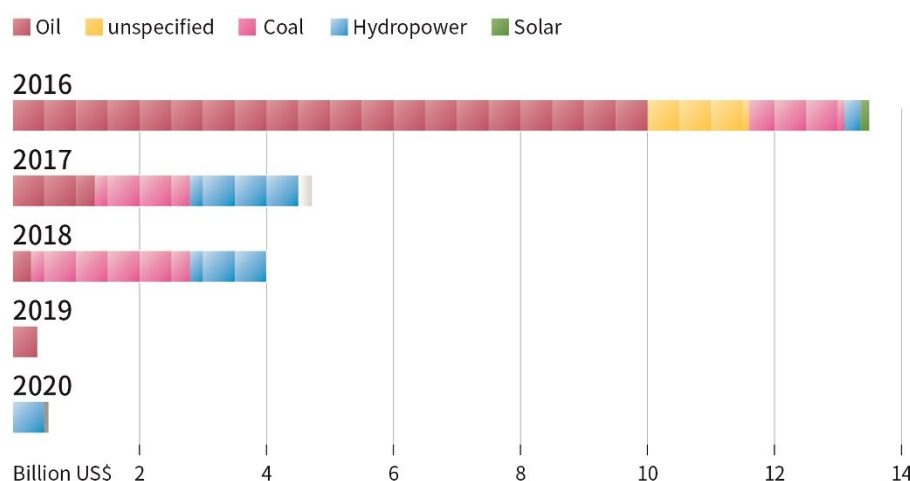
3.3 Beijing is ambling towards a “Green Deal” for Africa

In her speech at the 2019 Belt and Road Forum, International Monetary Fund (IMF) Managing Director Christine Lagarde noted that BRI 2.0 and “[t]he launch of the green investment principle at this conference is a further important step forward for the BRI”.⁷⁷

Chapter 41 of China's Fourteenth Five-Year Plan and Vision 2035 outlines a plan to promote the high-quality development of the Belt and Road to “embrace the concepts of green, openness and honesty”, and to promote the construction of the Green Silk Road by strengthening exchanges and cooperation in addressing climate change, marine cooperation, wildlife conservation, desertification prevention and control. To cope with climate change, China has proposed to achieve the goal of carbon neutrality by 2060 (“Carbon Neutral 2060”). Sharing its experience and results with “carbon neutrality” will become an important part of the construction of the Green Silk Road.⁷⁸

According to a study by the Boston University Global Development Policy Center, the Export-Import Bank of China and China Development Bank were the main financing institutions for the country's overseas energy investments in hydropower, oil and coal. The year 2020 saw a plunge in investments in unsustainable energy sources such as oil and coal.⁷⁹

China's energy investments in Africa



Although China continues to fund fossil fuel and hydropower projects (the latter produces less carbon compared to natural gas or coal, but it produces more greenhouse gases than wind and solar), it has signaled the need to mitigate climate change in its investment decisions at previous summits of the Forum on China-Africa Cooperation.⁸⁰

At the UN General Assembly in November 2021, Xi Jinping announced to cease financing coal-fired power plants overseas. Since then, China has not financed or invested in coal projects, and green energy financing increased marginally from \$6.2 billion to \$6.3 billion in 2020. A major change in the pattern of Chinese energy investment has emerged in the BRI since 2020, with a significant increase in the share of solar/wind investments.⁸¹

77 Lagarde, Christine: BRI 2.0: Stronger Frameworks in the New Phase of Belt and Road, accessed April 6th, 2022, <https://www.imf.org/en/News/Articles/2019/04/25/sp042619-stronger-frameworks-in-the-new-phase-of-belt-and-road>.

78 Guo, “One Belt, One Road” 2.0: carbon neutral to promote the construction of green silk road (“一带一路” 2.0时代, “碳中和” 推动绿色丝绸之路建设), 2021, accessed April 6th, 2022, <https://www.163.com/dy/article/G61LPVC50519C6BH.html>

79 The Boston University Global Development Policy Center: China's Global Energy Finance - China Development Bank (CDB) and Export-Import Bank of China (CHEXIM), 2022, accessed April 6th, 2022, <https://www.bu.edu/cgef/?lang=en#/2017/Country-EnergySource>

80 Lili Pike: Are China's energy investments in Africa green enough? 2018, accessed April 6th, 2022, <https://chinadialogue.net/en/energy/10799-are-china-s-energy-investments-in-africa-green-enough/>

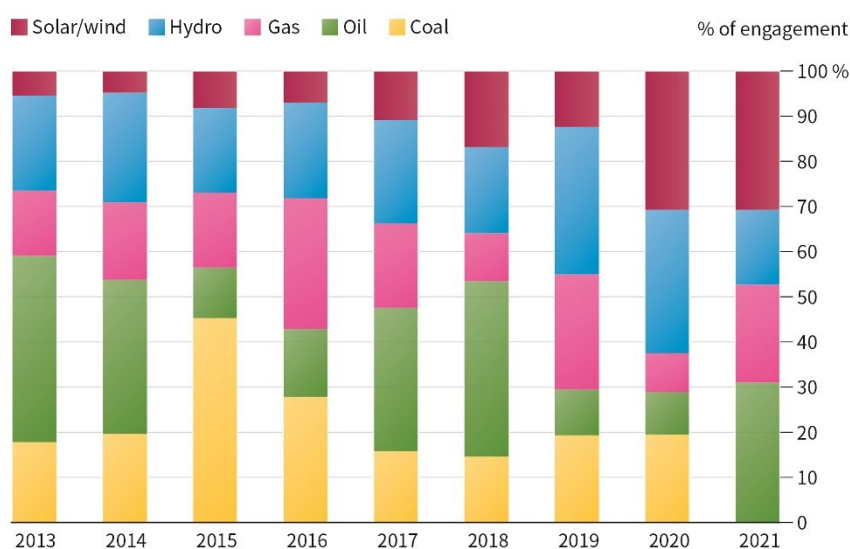
81 GREEN FINANCE & DEVELOPMENT CENTER: Brief: China Belt and Road Initiative (BRI) Investment Report 2021, 2022, accessed April 6th, 2022, <https://greenfdc.org/brief-china-belt-and-road-initiative-bri-investment-report-2021/>

At the November 2021 ministerial meeting of the Forum on China-Africa Cooperation, China announced to sharply reduce its investment in energy-intensive infrastructure in Africa for the next three years. It also cut aid in capacity building by 90 percent. At the same time, the Vision 2035 document released at the conference pledged to build a new green growth model for China-Africa joint ecological development, and in January 2022, China's Ministry of Ecology and Environment, in conjunction with the Ministry of Commerce, issued new "Guidelines for Ecological Environmental Protection of Foreign Investment Cooperation and Construction Projects", which will have a significant impact on China's overseas investment patterns in the coming years.⁸²

The following figure shows the shift in China's attitude toward energy investment and construction financing in the BRI countries and especially in Africa, with green and sustainable investment becoming an important trend for Chinese investment in the BRI 2.0 era.⁸³

Chinese energy engagement in the Belt and Road Initiative (BRI)

2013–2021 by subsector



3.4 Chinese vendors dominate Africa's smartphone market

Chinese technology and infrastructure companies are becoming a crucial factor in the rapid modernization of African societies and economies. Especially the rise of Chinese digital technology and platform companies in Africa has raised eyebrows, often linked to the claim that Chinese companies would spread authoritarian models of governance.⁸⁴ Arguably, the widespread use of mobile phones generated the most important impact on the technological transformation of individual and collective life in Africa. As Achille Mbembe points out, "the introduction of the mobile phone on the continent has been a technological event of considerable singularity. In Africa, this device is not only a medium of communication. It is also a medium of self-stylization and self-singularization".⁸⁵

⁸² John Feffer: China's Evolving Energy Policies in Africa, 2022, accessed April 6th, 2022, <https://ips-dc.org/chinas-evolving-energy-policies-in-africa/>.

⁸³ GREEN FINANCE & DEVELOPMENT CENTER: Brief: China Belt and Road Initiative (BRI) Investment Report 2021, 2022, accessed April 6th, 2022, <https://greenfdc.org/brief-china-belt-and-road-initiative-bri-investment-report-2021/>.

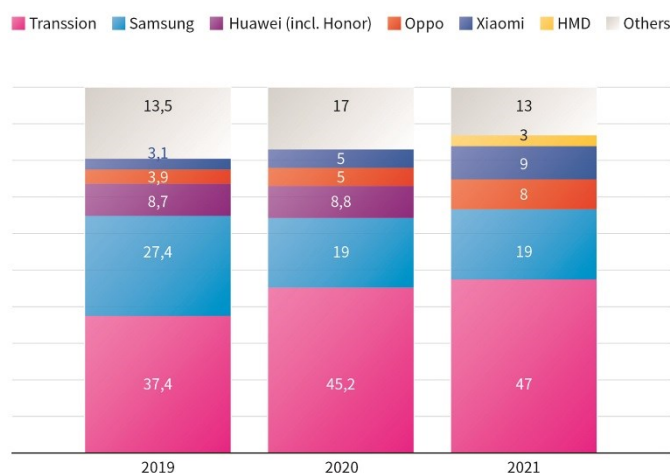
⁸⁴ Anderson, Ross: The Panopticon Is Already Here. (The Atlantic, September 2000 Issue), accessed April 5, 2022, at <https://www.theatlantic.com/magazine/archive/2020/09/china-ai-surveillance/614197/>.

⁸⁵ Mbembe, Achille: Out of the dark night, Columbia University Press 2021, p. 216.

◆ SECURITY, ENERGY & TECHNOLOGY

While “shanzhai” (imitation) products no longer sell easily on the Chinese market, companies such as Oppo and Transsion have found a growing number of untapped markets in Africa.⁸⁶ They produce affordable mobile phones, but are often largely unknown both in China and the West. Transsion has a market share of almost 47 percent in Africa for mobile phones. Chinese digital technologies, thus, play a central role in an “Africa that accords a central place to experimentation, an Africa in which astonishingly postmodern images and practices of existence germinate.”⁸⁷ As the figure below indicates, Chinese companies dominate the African market with more than 64 percent of shipped units.

Share of smartphone unit shipments to Africa by vendor



Source: www.statista.com/statistics/1104732/africa-smartphone-shipments-share-by-quarter/
Figure generated by M. Mayer (2022). Chart: Schwochow Visual Stories

3.5 Huawei is practically monopolizing Africa's transformation from 4G to 5G

The sum of investments of Chinese large high-technology companies in Africa are amounting to 12% percent of their overall projects and investments abroad, according to the data from ASPI visualized in the figure above. Given the relatively small share of Africa in Chinese foreign trade,⁸⁸ this indicates an outsized interest and expectation in the continent. This great vision of success and progress is shared by Alibaba. In November 2019, Jack Ma visited Ethiopia's capital to ink a deal in which the Alibaba Group and the Ethiopian government partnered to create the Electronic World Trade platform Ethiopia Hub. The hub is supposed to promote digital connectivity and global e-commerce.⁸⁹

Currently, digital trade mainly serves to facilitate the export of agricultural products such as coffee.⁹⁰ The

Distribution of Chinese tech companies' overseas projects and investments

29% Europe
27% Asia
17% North America
12% Africa
15% other



Source: chinattechmap.aspi.org.au/it/homepage/. Figure generated by M. Meyer (2022).
Chart: Schwochow Visual Stories

Ethiopia Hub, which is linked to Alibaba's Tmall Global, promoted the Ethiopian Coffee Brands Launch with 11,200 bags of Ethiopian coffee, they were sold within seconds. The UN is also partnering with these initiatives. UN Under-Secretary-General and Executive of the ECA, Vera Songwe, noted that the “success recorded in exporting Ethiopian coffee to China will provide a roadmap in leveraging export potential for other ten African countries, where ECA is working this year, to provide more export potential from Africa to China”.⁹¹ According to Gebremeskel Chala, Ethiopian Minister of Trade and Regional Integration, such digital connections show the “benefits that, not only Ethiopia, but Africa can reap in harnessing digitalization”.⁹²

86 Williams, Alexandria: China is making more of Africa's phones than you think. (Quartz Africa, December 12, 2019), last accessed April 5, 2022, at <https://qz.com/africa/1764356/china-makes-majority-of-africas-smartphones/>.

87 Mbembe, Achille: Out of the dark night, Columbia University Press 2021, p. 6.

88 China's leading export partners in 2021, based on export value. (Statista, February 2022), last accessed April 5, 2022, at <https://www.statista.com/statistics/256350/main-export-partners-for-china-by-export-value/>.

89 Fasil, Mahlet: Alibaba Group to help Ethiopia set up first eWTP hub, the second in Africa. (Addis Standard, November 25, 2019), last accessed April 5, 2022, at <https://addisstandard.com/news-alibaba-group-to-help-ethiopia-set-up-first-ewtp-hub-the-second-in-africa/>.

90 Mureithi, Carlos: African diplomats are live-streaming and making deliveries to China's consumers. (Quartz Africa, January 27, 2022), last accessed April 5, 2022, at <https://qz.com/africa/2117788/african-nations-bet-big-on-chinas-e-commerce-market/>.

91 Africa: Ethiopian Coffee Brands Launch on China's Largest e-Commerce Platform, Alibaba Group, in a Joint Effort with ECA and the Ethiopian Government. (All Africa, Press Release, January 24, 2022), last accessed April 5, 2022, at <https://allafrica.com/stories/202201240560.html>.

92 Africa: Ethiopian Coffee Brands Launch on China's Largest e-Commerce Platform, Alibaba Group, in a Joint Effort with ECA and the Ethiopian Government (All Africa, Press Release, January 24, 2022), last accessed April 5, 2022, at <https://allafrica.com/stories/202201240560.html>.

The graph below shows that the largest share of projects and investments in Africa is held by Huawei (44%), followed by ZTE (18%), Uniview (9%) and China telecom. This mix indicates that Chinese companies are unquestionably critical providers of telecommunication infrastructures in Africa. In fact, without Chinese tech companies, cellular communication in Africa would not be at the same level as it is today: “50 percent of 3G systems used by African telecommunication operators were built by Huawei and another 20 percent to 30 percent were built by ZTE, while Huawei has built up 70 percent of 4G networks and is likely to build all 5G networks”.⁹³

Chinese tech activities in Africa by company

44% Huawei
18% ZTE
6% China Telecom
6% China Unicom
9% Uniview
2% Alibaba
2% Ant Group
13% Others



Source: chinatmap.aspi.org.au/#/homepage/. Figure generated by M. Meyer (2022).
Chart: Schwachow Visual Stories

China’s digital silk road (DSR) addresses a need of African countries: to invest in and construct massive digital and data infrastructures,⁹⁴ required to run Africa’s megacities and emerging economic corridors. China plans to invest an additional \$8.43 billion in Africa to promote the DSR.⁹⁵ Infrastructure, scientific cooperation and digitalization were adopted as part of the “Forum on China-Africa Cooperation Dakar Action Plan (2022-2024)” in November 2021, at the 8th Ministerial Conference of the Forum on China-Africa Cooperation (FOCAC) in Dakar, Senegal.⁹⁶ African countries, thus, are highly unlikely to join the US-led “Clean Network Initiative”, which aims to curb the influence of Huawei and ZTE.

3.6 Chinese digital technologies are extensively shaping Africa’s societies

The variety of sectors and different uses of digital technologies provided by Chinese tech companies in Africa point to a trend of diversification away from infrastructure. The figure above shows that surveillance and “smart city” projects account for almost 50 percent of activities. Yet, there are also e-payment ecosystems, biotechnology, cloud computing, artificial intelligence projects and increasing investments in fintech startups.⁹⁷ As China has become the most important trading partner for most African countries, experts on economic development have been concerned that integrating African economies into global value chains will lead to increases in the “share of higher-value activities in its export structure”.⁹⁸ A closer look at the transnational network of private and state actors that deliver Chinese technology aid and push digitalization in many African countries is warranted.

93 Wright, Bianca: Made in China: Africa’s ICT infrastructure backbone. (Chief Information Officer, March 22, 2020), last accessed April 5, 2022, at <https://www.cio.com/article/193170/made-in-china-africas-ict-infrastructure-backbone.html>.

94 Chimbela, Chiponda: Investing in Africa’s tech infrastructure. Has China won already? (Deutsche Welle, May 3, 2019), last accessed April 5, 2022, at <https://www.dw.com/en/investing-in-africas-tech-infrastructure-has-china-won-already/a-48540426>.

95 Chaudhury, Dipanjan Roy: China reportedly investing \$ 8.43 bn in Africa as part of Digital Silk Road initiative. (The Economic Times, October 15, 2021), last accessed April 5, 2022, at <https://economictimes.indiatimes.com/news/international/world-news/china-reportedly-investing-8-43-bn-in-africa-as-part-of-digital-silk-road-initiative/articleshow/87039334.cms?from=mdr>.

96 Forum on China-Africa Cooperation Dakar Action Plan (2022-2024). (Ministry of Foreign Affairs of the People’s Republic of China, November 30, 2021), last accessed April 5, 2022, at https://www.fmprc.gov.cn/mfa_eng/wjdt_665385/2649_665393/202112/20211202_10461183.html.

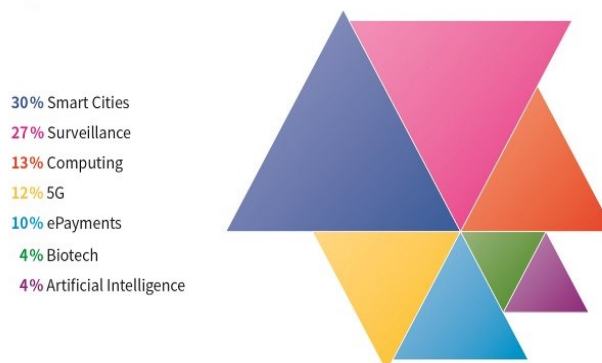
97 Nyabigye, Jevans: Chinese investors are again pouring millions into Africa’s fintech start-ups. (South China Morning Post, August 29, 2022), last accessed April 5, 2022, at <https://www.scmp.com/news/china/diplomacy/article/3146678/chinese-investors-are-again-pouring-millions-africas-fintech>.

98 Fuchs, Andreas: Africa benefits from trade with Asia and China. (IFW Kiel Institute For The World Economy, September 2, 2020), last accessed April 5, 2022, at <https://www.ifw-kiel.de/publications/media-information/2020/africa-benefits-from-trade-with-asia-and-china/>.

◆ SECURITY, ENERGY & TECHNOLOGY

In fact, the unique constellation of Chinese and local actors in the African tech landscape contradicts the one-dimensional understanding of the impact of “Chinese state capitalism” on African economies.⁹⁹ Various studies demonstrate that private tech companies and state-owned enterprises follow different logics of investment, organization, and engagement with local actors. Most importantly, African societies and governments are not passive but follow their own interests. Their heterogeneous agency is a crucial part of the new reality in African technological developments.¹⁰⁰

**Chinese tech activities in Africa
by sector**



Source: chinatechmap.aspi.org.au/#/homepage/. Figure generated by M. Meyer (2022).
Chart: Schwachow Visual Stories

Given the cheap and reliable technological solutions Chinese companies provide from smartphones and sea cables to 5G infrastructure and smart surveillance technologies, it is unquestionably that Chinese digital technologies are fast becoming crucial components at all levels of the African tech stake. The involvement of Huawei in multiple “Safe City” projects across African countries, therefore, has led to the assumption that Chinese companies could soon become dominant players in the global South: “After adopting Huawei’s equipment, countries may be “locked-in” by high replacement costs. As these economies grow, Huawei is poised to capture market share, spread its standards, and gain access to foreign data to improve its technology.”¹⁰¹

In some cases, Chinese companies used IT standards for ICT broadband backbone that were only compatible with Huawei routers.¹⁰² Another example is massive Chinese investments in the construction of a new Egyptian capital which includes urban conglomerations, smart infrastructure, and industrial and special manufacturing zones along the Suez’s Canal. This will give China a stake in the capital of one of the leading states in the region.

However, US companies, including Google, Facebook and Elon Musk’s Starlink also built enormous new infrastructures including satellite-based internet access and new sea cables that link Africa with other continents.¹⁰³ As a result, African governments will, on the one hand, greatly increase their infrastructural power and thereby become more autonomous vis-à-vis other social and economic actors and society at large. On the other hand, African countries are increasingly dependent on both US and Chinese tech companies whilst their soft and hardware infrastructure entails components from the rivalling technology providers, defying the binary exclusionary logic of the U.S. Clean Network initiative. As a result, African technology sectors and infrastructures are poised to become a hotbed for great power competition, which is evolving around China, the EU’s global gateway and a renewed U.S. interest in Africa.¹⁰⁴

99 Wang, Rong, François Bar, and Hong, Yu: ICT aid flows from China to African countries: A communication network perspective, in: International Journal of Communication, Volume 14, 2020, pp. 1498-1523 (p. 1498).

100 Chen, Weiwei: China and Africa: Ethiopia case study debunks investment myths. (The Conversation, February 21, 2022), last accessed April 5, 2022, at <https://theconversation.com/china-and-africa-ethiopia-case-study-debunks-investment-myths-177098>; see also: Lee, Ching Kwan: The Specter of Global China, University of Chicago Press 2020; Gagliardone, Iginio: China, Africa, and the Future of the Internet, Bloomsbury Publishing 2019.

101 Jonathan E. Hillman and McCalpin, Maesee: Watching Huawei’s “Safe Cities”. (Center for Strategic and International Studies, CSIS Briefs, November, 2019), last accessed April 5, 2022, at https://csis-website-prod.s3.amazonaws.com/s3fs-public/publication/191030_HillmanMcCalpin_HuaweiSafeCity_layout_v4.pdf.

102 Veda Vaidyanathan and Gomera, Jumanne: Power and Communication Infrastructure - Case Studies of Mtwara – Dar es Salaam Natural Gas Pipeline Project and National ICT Broadband Backbone (NICTBB), in: Vaidyanathan, Veda (ed.), China’s Infrastructure Development in Africa: An Examination of Projects in Tanzania and Kenya, Delhi: Institute of Chinese Studies 2019, p. 95-110

103 Wright, Bianca: Made in China: Africa’s ICT infrastructure backbone. (Chief Information Officer, March 22, 2020), last accessed April 5, 2022, at <https://www.cio.com/article/193170/made-in-china-africas-ict-infrastructure-backbone.html>.

104 Runde, Daniel, Savoy, Conor and Staguhn, Janina: China and SMEs in Sub-Saharan Africa: A Window of Opportunity for the United States. (Center for Strategic and International Studies, CSIS Briefs, October 15, 2021), last accessed April 5, 2022, at <https://www.csis.org/analysis/china-and-smes-sub-saharan-africa-window-opportunity-united-states>

Recognizing this complex technological trajectory, the claim that China spreads “totalitarian technology” in Africa also needs to be scrutinized. Observers and scholars have noticed that some African states try to imitate China’s internet governance approach, including censorship and surveillance techniques. Others have argued that China may export its brand of digital authoritarianism by using exported digital information technology and data infrastructures. Furthermore, China’s approach to cyber government is attractive to authoritarian regimes. For instance, the members of the Gulf Cooperation Council (GCC) consider China to have “the upper hand on the normative side of this competition” in reference to the U.S., while Chinese firms “play an integral role in affordable 5G network development”.¹⁰⁵ There was little evidence as of now, however, that China is indeed successfully exporting “digital authoritarianism”. Regardless of whether in the global North or South, the country has not been able to turn its infrastructural or institutional influence into productive power that is able to shape social relations, preferences, and political systems.

Moreover, as Mandira Bagwandeem pointed out, “the narrative that China is championing digital authoritarianism on the continent cannot be analyzed without the miasma of hegemony waging tech wars and overarching struggles for dominance. By portraying China (and, by extension, its tech companies) as deviant actors that want to diminish digital democracy, the US places itself on higher moral ground. However, this moral edifice is one thinly lacquered – after all, they too spy on their citizens (thanks to Edward Snowden for enlightening us on extensive surveillance by US intelligence). Furthermore, countries such as France, the US, the UK, Israel and Germany also supply high-end surveillance technology, spyware, hacking software and censorship applications to fragile democracies and illiberal governments.”¹⁰⁶

Recent scholarship on the impact of Chinese telecommunication technologies on African countries demonstrates that “rather than exporting ‘digital Leninism’ through regulations attached to its aid, it seems that China trends toward a fundamentally more Smithian pursuit of self-interest.”¹⁰⁷ Chinese companies are active within and across all levels of the infrastructure stack in African countries,¹⁰⁸ but Internet policies and infrastructural constellations emerging in African countries suggest an independent local agency that does not reproduce the binary logic of “digital colonialism”.¹⁰⁹ In sum, data infrastructures provided by Chinese companies are increasingly widespread in African countries. They are becoming co-constitutive for states and societies, yet, without easily exporting and implanting Chinese norms and principles.

105 Khorrami, Nima: The Great Power Race in GCC Cyberspace. (Carnegie Endowment For International Peace, December 14, 2020), last accessed April 5, 2022, at <https://carnegieendowment.org/sada/83446>.

106 Bagwandeem, Mandira: Don’t blame China for the rise of digital authoritarianism in Africa. (Foreign Policy Research Institute, September 13, 2021), last accessed April 5, 2022, at <https://www.fpri.org/article/2021/09/dont-blame-china-for-the-rise-of-digital-authoritarianism-in-africa/>.

107 Tong, Amy: China’s ICT Engagement in Africa: A Comparative Analysis, (The Yale Review of International Studies, Volume 11, 2021), last accessed April 5, 2022, at <http://yris.yira.org/essays/4702>.

108 Agbebi, Motolani: China’s Digital Silk Road and Africa’s Technological Future. (Council On Foreign Relations, February 1, 2022), last accessed April 5, 2022, at https://www.cfr.org/sites/default/files/pdf/Chinas%20Digital%20Silk%20Road%20and%20Africas%20Technological%20Future_FINAL.pdf.

109 Gagliardone, Iginio: China, Africa, and the Future of the Internet, Bloomsbury Publishing 2019.

4. SOFT POWER, CULTURE & POPULATION

4.1 Chinese media presence in Africa has intensified

International broadcasting, an expression of a nation's global media presence, can be defined as "a complex combination of state-sponsored news, information, and entertainment directed at a population outside the sponsoring state's boundaries".¹¹⁰ Practiced as early as in World War I, radio and newsreel were increasingly used to inform and influence foreign publics and continued during World War II and later the Cold War. Today, in the global information age of the 21st century, such traditional programs have been complemented by a broad variety of online services and social media platforms.

In the Chinese context, the so-called "Big Four" – Xinhua News Agency, Central China Television, China Radio International, and China Daily – have each undergone extensive restructuring and initiated globally-oriented programs to spread Chinese culture, improve China's image around the world, and, last but not least, realize financial profits.¹¹¹ With the creation and continual expansion of media outlets like these, China seeks to provide an alternative to the Western-dominated media "by presenting China's own version of issues and events happening inside China, Asia, and the world."¹¹²

Africa has become a special target of such programs, as recent figures and developments indicate: Xinhua News Agency, founded in 1932, is the largest official Chinese news agency with about 10,000 journalists based in 144 bureaus around the world. It provides daily news coverage in politics, economics, sports, and culture.¹¹³ Its Africa section provides basic information on Chinese relations with Africa at large as well as detailed information on each of its states from Algeria to Zimbabwe. According to Zhou Qisheng, Xinhua Executive Deputy Editor-in-Chief, "Xinhua's expansion into overseas markets is closely related to China's expansion of its soft power abroad – we cannot just rely on economic power alone!"¹¹⁴

The nation's foremost television broadcaster, Central China Television, is a further instrument designed and put to use in order to enhance China's soft power. Founded in 1958, the channel's international branch, meanwhile called China Global Television Network (CGNT), was launched in 2010. Today, in addition to its flagship headquarters in Beijing, it has two production centres abroad: one in the United States of America (Washington, D.C.) and one in Kenya (Nairobi). In recent years, programs have expanded dramatically and are accompanied by a strong presence on social media. Additionally, Chinese media provide free content for local African stations as well as training programs for journalists, once more with a special focus on Africa.¹¹⁵

Considering initiatives on the airwaves, China has in recent years heavily invested in the global outreach of China Radio International (CRI). Founded in 1941 as Radio Beijing, CRI now broadcasts globally from 30 foreign bureaus in 43 languages. Attesting to the special significance of Africa in China's media and soft power strategy, its first radio station broadcasting on FM abroad was launched in Nairobi in 2006.¹¹⁶

Lastly, China Daily takes pride in being the oldest and most widely read English-language Chinese newspaper with an international direction. Founded in 1981, it has an aggregate circulation of more than 400,000, one-quarter of which is attributed to the overseas market.¹¹⁷ In recent years, the Chinese government has been investing huge sums into China Daily, with the African market as a particular target.¹¹⁸ The launch of a specific China Daily Africa Edition in December 2012 emphasizes this.¹¹⁹

To summarize, the "Big Four" in the Chinese media landscape, and among them especially Xinhua News Agency and China Central Television, have experienced substantive expansion regarding their funding and global outreach at the hands of the Chinese government. These developments indicate that the Chinese government seems to have recognized that success in world politics in the 21st century may not (or at least not solely) rest upon having the strongest economy or the greatest military but, to quote John Arquilla and David Ronfeldt, "may ultimately be about whose story wins".¹²⁰

110 Monroe E. Price, Susan Haas, and Drew Margolin, *New Technologies and International Broadcasting: Reflections on Adaptations and Transformations*, in: *The Annals of the American Academy of Political and Social Science*, Vol. 616, No. 1, 2008, pp. 150-172 (pp. 152-153).

111 David Shambaugh, *China Goes Global: The Partial Power*, New York 2013, p. 227.

112 Zhang Xiaoling, *Chinese State Media Going Global*, in: *East Asian Policy*, Vol. 2, No. 1, 2010, pp. 42-50 (p. 43).

113 Agence France-Presse (AFP), Xinhua News Agency, accessed March 15, 2022, <https://www.afp.com/en/products/partners/xinhua-news-agency>.

114 David Shambaugh, *China Goes Global: The Partial Power*, New York 2013, p. 230.

115 Gary D. Rawnsley, *Communicating Confidence: China's Public Diplomacy*, in: Nancy Snow and Nicholas J. Cull (eds.), *Routledge Handbook of Public Diplomacy*, 2nd Edition, New York 2020, pp. 284-300 (p. 294).

116 CRIonline, *Über uns*, September 17, 2019, accessed March 15, 2022, <http://german.cri.cn/wir/wir/3268/20190917/351604.html>.

117 David Shambaugh, *China Goes Global: The Partial Power*, New York 2013, pp. 233-234.

118 Sergio Grassi, *Changing the Narrative: Chinas mediale Offensive in Afrika*, Internationale Politikanalyse, Friedrich-Ebert-Stiftung, Berlin 2014, pp. 1-3.

119 China Daily, *Pages of History*, 2016, accessed March 15, 2022, <http://www.chinadaily.com.cn/china/cd35years/index.html>.

120 John Arquilla and David Ronfeldt, *The Emergence of Noopolitik: Toward an American Information Strategy*, Santa Monica 1999, p. 53.

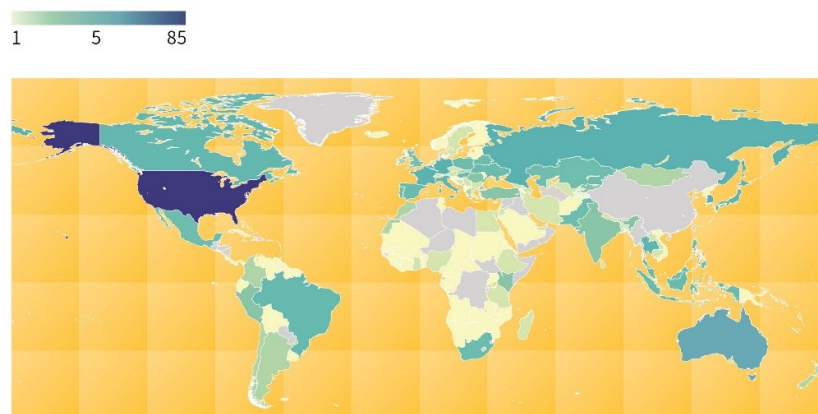
An integral component in this regard is making one's story available to the world in the first place. China's recent broadcasting and media initiatives can clearly be identified to answer this very purpose – and Africa has been identified as a particularly crucial target, with specific programs geared towards the general population as well as local elites. So far, however, a perceived closeness to the Communist Party of China (CPC) has, according to some surveys and studies, discredited much of the Chinese media outreach. In the highly competitive international media landscape, Xinhua News Agency, in particular, has yet to extricate itself from the accusation of merely transmitting state propaganda and get rid of what has been called the “Xinhua stigma”.¹²¹ A central ingredient for Chinese international broadcasting and media services in this regard is to become, in the eyes of the global public, an independent, reliable and trustworthy source of information.¹²²

4.2 Confucius Institutes are finding traction in Africa

In addition to international broadcasting, the creation of Chinese cultural institutes, the Confucius Institutes, can be identified as a particularly important, visible, and impactful aspect of China's quest to wield its soft power globally. In fact, perhaps no other Chinese soft power instrument has caused greater ripples than the creation of hundreds of Confucius Institutes and Confucius Classrooms at universities and schools around the world. With their very designation, these institutes allude to the focus on culture and Confucian values, like family and harmony, as major sources of Chinese soft power.¹²³

Since the first Confucius Institute opened its doors in Seoul in 2004, the number of institutes has mushroomed to about 550 around the world. As depicted on the map above, the main target regions for Chinese cultural institutes are still the United States of America (with 85 institutes in 2021, despite a slight decrease in recent years) as well as the United Kingdom (with 30 institutes). Africa as a continent, however, has seen a steep increase in the number of institutes in recent years.¹²⁴ In fact, according to CGNT, Confucius Institutes have become “a bedrock of China's growing cultural ties with Africa”.¹²⁵ The first Chinese cultural institute opened its doors on the African continent in Nairobi in December 2005. Since then, the number of Confucius Institutes is now second only to that of comparable French institutions. Until 2018, more than seven million students had attended Chinese language and cultural classes around the world, emphasizing the broad reach of Chinese cultural programs.¹²⁶

Confucius Institutes around the world, 2021



Source: digmandarin.com uis.unesco.org/en/uis-student-flow.
Map configured by H. W. Ohnesorge (2022). Chart: Schwachow Visual Stories

¹²¹ Bloomberg Businessweek, Bloomberg, Reuters – and Xinhua?, February 16, 2003, accessed March 15, 2022, <http://www.businessweek.com/stories/2003-02-16/bloomberg-reuters-and-xinhua>.

¹²² Si Si, Expansion of International Broadcasting: The Growing Global Reach of China Central Television, Reuters Institute for the Study of Journalism, Working Paper, July 2014, accessed March 15, 2022, <https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2018-01/Expansion%20of%20International%20Broadcasting.pdf>, p. 12.

¹²³ Young Nam, Cho and Ho Jeong, Jong, China's Soft Power: Discussions, Resources, and Prospects, in: Asian Survey, Vol. 48, No. 3, May/June 2008, pp. 453-472 (p. 470).

¹²⁴ Digmandarin, Confucius Institutes around the World – 2021, February 22, 2021, accessed March 15, 2022, <https://www.digmandarin.com/confucius-institutes-around-the-world.html>.

¹²⁵ Abhishek G. Bhaya, Confucius Institutes a bedrock of China's growing cultural ties with Africa, August 22, 2018, accessed March 15, 2022, https://news.cgtn.com/news/3d3d514f346b544e79457a6333566d54/share_p.html.

¹²⁶ Abhishek G. Bhaya, Confucius Institutes a bedrock of China's growing cultural ties with Africa, August 22, 2018, accessed March 15, 2022, https://news.cgtn.com/news/3d3d514f346b544e79457a6333566d54/share_p.html.

Soft power, culture & population

Meanwhile, however, Chinese Confucius Institutes have also become the target of scholarly debate and political controversy. Accordingly, charges of political bias and propaganda have repeatedly been made, resulting even in the closing of some institutes. Also, recent polls by the Afrobarometer indicate that among the 34 African countries polled, the Chinese language is named only by 3 percent as the “most important international language to learn,” far behind English (69 percent) and French (14 percent).¹²⁷

While the Confucius Institute might be the most visible player in the Chinese soft power competition, various other cultural initiatives could be named, for example, the Sino-African Cultural Year hosted by China in 2004.¹²⁸ In fact, the establishment and deepening of cultural relations have been described as China’s key interest dating back to the 2006 ‘White Paper on African Policy’, even though some researchers depict the relationships as imbalanced because they focus predominately on the introduction of Chinese culture.¹²⁹

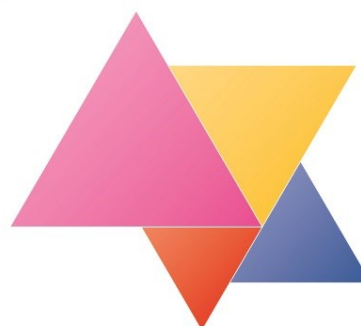
4.3 China’s attractiveness for African students is second only to France’s

Today, China has become a major hub for incoming and outgoing students, as figures indicate. According to the UNESCO Institute for Statistics, the total number of outbound Chinese students increased from 403,175 in 2006 to 719,014 in 2013, and 1,061,511 in 2019 – an increase by 163 percent. During the same time, inbound international students studying at Chinese institutions of higher education increased from 36,386 in 2006 to 96,409 in 2013, and 201,177 in 2019 – an increase of 453 percent.¹³⁰ In recent years, China has stepped up its efforts to attract international students to its universities, with impressive success.

While certainly a global phenomenon, Africa again plays a particularly important role in this crucial soft power dimension. When the People’s Republic of China opened diplomatic relations with African countries in the 1950s, a humble 24 African students studied in China, with numbers growing to 164 students by the mid-1960s.¹³¹ More recently, however, this development has gathered pace dramatically: from 1,793 African students at Chinese universities in 2003 to 16,404 in 2010, and 81,562 students in 2018, an overall increase of about 300 percent annually over a 15-year period.¹³²

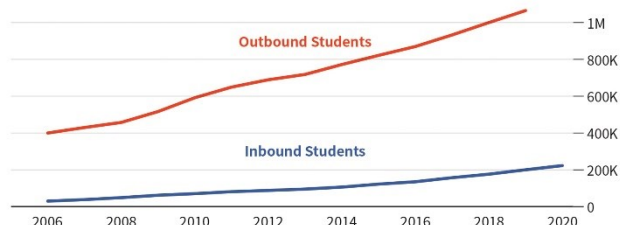
Number of Cultural Institutes in Africa

111 Alliance Française
60 Confucius Institutes
35 British Council
25 Goethe Institutes



Source: digmandarin.com, goethe.de, britishcouncil.org, foundation-alliancefr.org.
Figure generated by H. W. Ohnesorge (2022). Chart: Schwachow Visual Stories

Chinese international student mobility



Source: UNESCO Institute for Statistics (UIS). Figure generated by H. W. Ohnesorge (2022).
Chart: Schwachow Visual Stories

¹²⁷ Josephine Appiah-Nyamekye Sanny and Edem Selormey, Africans Welcome China’s Influence but Maintain Democratic Aspirations, Afrobarometer, Dispatch No. 489, November 15, 2021, accessed March 15, 2022, at https://afrobarometer.org/sites/default/files/publications/Dispatches/ad489-pap3-africans_welcome_chinas_influence_maintain_democratic_aspirations-afrobarometer_dispatch-15nov21.pdf, p. 18.

¹²⁸ Xinhua News Agency, China, Africa Boost Soft Power through Cultural Exchanges, June 19, 2006, accessed March 15, 2022, <http://www.china.org.cn/english/features/wenjiabaoafrica/171843.htm>.

¹²⁹ Kathryn Batchelor, How Genuine is China-Africa Cultural Cooperation?, Policy Briefing, accessed March 15, 2022, <https://www.nottingham.ac.uk/research/groups/ctccs/documents/policy-briefing-china-africa-cultural-cooperation.pdf>.

¹³⁰ UNESCO Institute for Statistics (UIS), UIS.Stat, accessed March 15, 2022, <http://data.uis.unesco.org>.

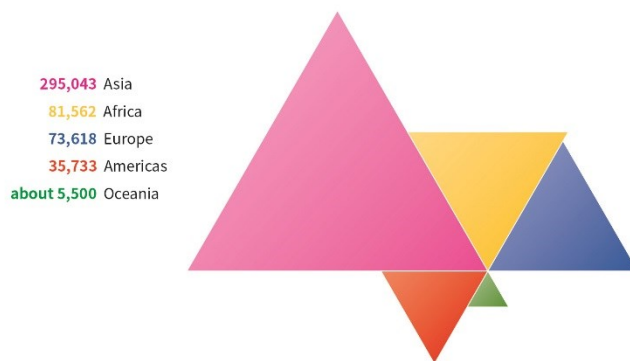
¹³¹ Liu, Hongwu and Jianbo Luo, Sino-African Development Cooperation: Studies on the Theories, Strategies, and Policies, Singapore 2021. p. 116.

¹³² Breezegeography, Update to: Stats on International Students Studying in China, June 26, 2019, accessed March 15, 2022, http://en.moe.gov.cn/news/press_releases/201904/t20190418_378586.html.

This development clearly indicates that Africa constitutes a veritable “growth market” for outgoing students attending Chinese universities. In fact, Africa meanwhile ranks second only behind Asia among continents of origin, accounting for 17 percent of international students in China. As these figures show, China has grown particularly popular among African students, and in 2020 China ranked second only behind France among top destinations for African students – with Ghana, Nigeria, Tanzania, Zambia, and Zimbabwe as the leading countries of origin. According to University World News, this trend can be attributed to a growing attraction China holds among African students, stemming, among others, in low tuitions fees and low language and visa requirements.¹³³ Against the backdrop of these developments, Benjamin Mulvey has noted the distinct soft power potential flowing from these student exchanges, often explicitly encouraged by scholarship programs, due to their long-term implications: “It is most likely such benefits would accrue after African graduates of Chinese universities move into more senior positions in business or politics in their home countries a decade or two later”.¹³⁴

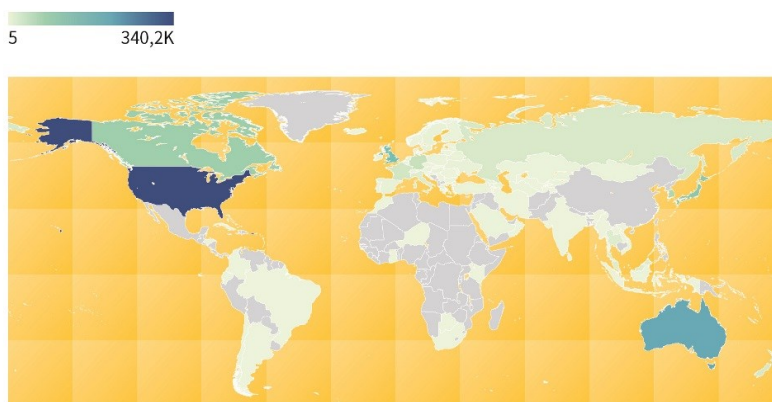
Concerning outgoing Chinese students, globally and with respect to Africa, however, the picture is a different one. According to data from the UNESCO Institute of Statistics, the United States of America (340,222), Australia (155,594), and the United Kingdom (122,140) rank as the most popular destinations for outgoing Chinese students. The first African country making the list is South Africa with a modest 165 Chinese students in 2019.¹³⁵ Once more, imbalance becomes visible in the incoming-outgoing ratio of international students. In addition to these “classical” examples of exchange diplomacy, 2,300 institutions of higher education offer joint-degree programs alongside Chinese partners around the world. Nine universities have established joint campuses in China (3 from the U.S., 2 from the UK, 2 from Hong Kong, one from Russia, and one from Israel), emphasizing China’s interest in creating long-term partnerships for years to come.¹³⁶

Number of international students in China, 2018



Source: Ministry of Education of the People's Republic of China.
Figure generated by H. W. Ohnesorge (2022). Chart: Schwachow Visual Stories

Chinese students studying abroad, 2019



Source: UNESCO Institute of Statistics, Global Flow of Tertiary-Level Students, uis.unesco.org/en/uis-student-flow. Map configured by H. W. Ohnesorge (2022). Chart: Schwachow Visual Stories

¹³³ Wachira Kigotho, Educational Superhighway from Africa to China Speeds up Mobility, University World News, November 19, 2020, accessed March 15, 2022, <https://www.universityworldnews.com/post.php?story=20201118132655210>.

¹³⁴ Wachira Kigotho, Educational Superhighway from Africa to China Speeds up Mobility, University World News, November 19, 2020, accessed March 15, 2022, <https://www.universityworldnews.com/post.php?story=20201118132655210>.

¹³⁵ UNESCO Institute for Statistics (UIS), Global Flow of Tertiary-Level Students, accessed March 15, 2022, <http://uis.unesco.org/en/uis-student-flow>.

¹³⁶ Economist Intelligence, How Will the Coronavirus Affect Outbound Chinese Students?, September 25, 2020, accessed March 15, 2022, <https://www.eiu.com/n/how-will-the-coronavirus-affect-outbound-chinese-students/>.

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4.4 Number of Chinese workers in Africa has declined dramatically

Due to the deficits of African immigration management and government infrastructure, statistics of Chinese emigrants and international students in Africa are not always accurate and the data from other sources are even more conflicting. According to research data from the Blue Book of Overseas Chinese (2011), as of 2010, there were 250,000 Chinese emigrants in Africa.¹³⁷

According to the Overseas Chinese Affairs Office of the State Council of PRC, there were at least 500,000 Chinese doing business in Africa around 2010.¹³⁸ Chinese scholar Lv Ting mentioned in his article on the educational needs of new emigrants within the Chinese diaspora in Africa, published in the Annual Report on Overseas Chinese Study (2016), that 550,000 people resided in Africa, accounting for 1.2 percent of China's emigrant population abroad, making Africa the destination continent with the fewest emigrants. In contrast, 78.1 percent of emigrants from China live in countries of Asia, 13.9 percent in the Americas, 4.7 percent in European countries, and 2.1 percent in Oceania.¹³⁸

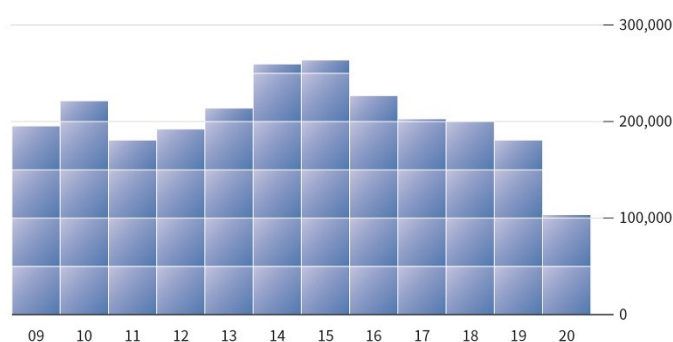
The number of Chinese workers in Africa at the end of 2020 was 104,074, a 43 percent decline from the previous year, due to travel difficulties in 2020. This continues the trend of declining numbers of Chinese workers in Africa, down from a peak of 263,659 in 2015. The five countries with the most Chinese workers in 2020 were Algeria, Nigeria, Ethiopia, the Democratic Republic of Congo and Angola. These five countries accounted for 46 percent of all Chinese workers in Africa by the end of 2020; Algeria alone accounted for 17 percent. These figures include Chinese workers sent to Africa to work on construction contracts for Chinese companies, so-called contract workers, and Chinese workers employed in other labour sectors, such as those working in factories. These numbers are reported by Chinese contractors and do not include informal migrants such as traders and shopkeepers.¹³⁹

Destination continents for Chinese emigrants



Source: Lv Ting, 2016
Chart: Schwowchow Visual Stories

Number of Chinese workers in Africa, 2009 to 2020



Source: National Bureau of Statistics of China
Chart: Schwowchow Visual Stories

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138 Yuan, Zhuang: African Chinese Business Profile Analysis (非洲华商概况分析), 2011, accessed March 31st, 2022, <http://qwgzyj.gqb.gov.cn/yjzt/159/1742.shtml>

139 Lv, Ting: Analysis of Educational Needs and Exploration of Supply Model for New Emigrants of Chinese Diaspora in Africa (非洲华侨华人新移民教育需求分析与供给模式探索), ANNUAL REPORT ON OVERSEAS CHINESE STUDY 2016, Beijing: Social Sciences Academic Press.

CONCLUSION

The facts and effects of China's engagement in Africa demonstrated by the latest major development trends have at large invalidated the allegation that "China exposes a development pressure for Africa".¹³⁹ With its comprehensive cooperation with African countries in diplomacy, trade, investment, health services, medicine, security, energy, technology, media, and culture, China appears to be neither a creator of a "debt trap," a "resource plunderer", a booster of "neo-colonialism", nor a "trade predator".¹⁴⁰

Negative impacts such as supplanting local manufacturers by more advanced Chinese producers, trade frictions or unfair deals and agreements enforced by Chinese companies remain sporadic and locally limited. In this context, Conteh-Morgan highlights the "intangible rhetoric" from the United States accusing China of "sabotaging the neo-liberal democratic capitalistic order on the continent". He believes, however, these pursuits are "devoid of, or pale in comparison with intangibles like roads, ports, dams, railways that have visible and immediate effects on personal, community, and even national livelihoods or existential security."¹⁴¹

One of the most tangible effects of Chinese engagement in Africa seems to be the extent to which the self-confidence of American countries in dealing with foreign forces has been enhanced by China's entry into the continent where political games had long been dictated by the West. A statement made by Teshome Toga Chanaka, Ambassador of Ethiopia to China, confirms this observation:

"The recent narrative that China is "colonizing Africa" economically is strongly refuted by African leaders and not corroborated by evidence. To talk about neo-colonialism in the twenty-first century, in whatever form or shape, is simply mind boggling. First, it diminishes the true horrors that were suffered by Africans and Black people across the world due to slavery, colonialism and apartheid — memories of which are still very vivid in many African minds. Second, Africans are mature enough not to allow neo-colonialism by China or any other power for that matter. It is also a puzzling paradox for many observers that those who criticize Africa for its engagement with China and those who gratify such a prejudice against the partnership do far more businesses with China than Africa."¹⁴²

Indeed, the agency of African companies and states is often overlooked in the narrative of "digital colonialism". The picture is much more complicated. Throughout the continent, African countries and societies are increasingly adept at using their resources and markets to serve their own interests in negotiations with foreign powers, including China.

With growing capital and technology flows from China promoted by the BRI 2.0, Africa is becoming a central arena for the escalating tech rivalry between the U.S. and China, and to a lesser extent the EU. However, there are numerous indications that African governments will most likely follow their independent course and will not join the U.S.-led Clean Network Initiative – an infrastructure project aimed to promote a multi-polar and interdependent tech world in the global South.

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141 Amel, Kaze: China's engagement in Africa: Is China a "Partner or a Predator", in: Chinese Journal of International Review, Vol. 3, No. 1 (2021), pp.1-26

142 Conteh-Morgan, *ibid.*, p. 275.

143 Chanaka, *ibid.*

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