BRIEF
NO. 4 2025

SWEDISH NATIONAL CHINA CENTRE

China's interests in Africa

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Summary

- World politics is increasingly characterized by the growing rivalry between the United States and China. This has accentuated the long-standing debate about the significance of China's growing presence in Africa, which has taken on a new dimension with the US withdrawal from international engagement since the return of Donald Trump as president in 2025. This study examines which Chinese interests are promoted by China's presence on the continent from the standpoint of its global strategic objectives.
- China has good political relations with Africa. China's narratives on the need for a multipolar international order enjoy strong support on the continent. African public opinion about China is largely positive. African countries defend China in multilateral contexts and have a voting pattern in the United Nations that is aligned with China. The Chinese Communist Party has close ties with political parties in Africa, particularly in countries governed by former liberation movements.
- China's trade with Africa has grown rapidly, reaching $295 billion in 2024. China is now Africa's largest single trading partner. Trade is unbalanced, however, as Africa mainly exports raw materials and imports finished products, contributing to a trade deficit that has grown over time. China buys a smaller share of its oil from Africa than previously, at around 10 per cent today compared to 30 per cent in 2011. By contrast, trade in minerals and metals is growing rapidly. Minerals and metals currently account for 45 per cent of Africa's total exports to China, compared to 20 per cent in 2015. Critical minerals are an important strategic resource for China in Africa and have created significant dependencies on China in the West.
- China provides extensive economic support to Africa through loans, investments and aid. Lending has declined sharply since its peak around 2016, but has seen some recovery since 2023. China's investments in Africa are concentrated in raw material extraction and contribute to western dependence on China for critical minerals. It is a matter of debate whether China's economic support promotes sustainable development or creates debt traps for African countries. Advocates see it as an important catalyst for Africa's development but critics argue that the support primarily benefits China economically.
- China is a dominant player in Africa's digital development and is using IT strategically as a means of gaining global influence, including for its technical standards. Chinese companies such as Huawei and ZTE built most of Africa's 3G and 4G networks. However, Africa's IT is fairly diversified in terms of supplier countries.

- Africa as a whole is not an important military arena for China. China's most important security interest in the region is the shipping lanes that cross the Indian Ocean. However, China has security cooperation with many African countries and is engaged in various conflict mediation efforts. Since Russia's full-scale invasion of Ukraine, China has also become the largest supplier of arms to sub-Saharan Africa. Normatively, China promotes the view that the root cause of conflict in Africa is a lack of development.

- Europe should invest in analysing what its interests are in Africa and how they are challenged by China's presence. European countries should take advantage of African countries' desire to diversify their relations in various areas. Europe should review the possibility of strengthen the position of the European telecoms sector in Africa, as well as continue its work to establish partnerships on minerals and metals with African countries.

Introduction

The world is undergoing a growing "bipolarization process", in which global power relations are increasingly characterized by the rivalry between the two most important superpowers, the United States and China. The return to power of US president Donald Trump has accelerated this development in powerful and often unpredictable ways, contributing to a more confrontational and unstable world order. In this new global political situation, both superpowers will seek to secure their own spheres of interest, not least in the Global South. Africa is an interesting strategic region in this context. Africa is the youngest continent. It has a rapidly growing population and great potential for future growth. Africa's future development is a key issue, particularly for neighbouring Europe.

China has long established a presence on the continent through investments, infrastructure projects and diplomatic initiatives, and there is a long-standing discourse on the manifold "challenges" posed by China's presence to, for example, global democracy, western interests and the rules-based world order. Trump's abrupt decision to shut down the US aid agency, USAID, in 2025 has also raised the question of whether China and other actors will step in to fill the void left by a United States that is withdrawing from certain forms of global engagement. However, there has been no systematic overview of which interests China wishes to promote through its presence on the continent, viewed from the perspective of its global objectives. A clear understanding of these interests is essential if European decision makers are to shape their Africa policy in a more bipolar world.

China's foreign policy has long been guided by a vision of a new, more China-centric global order. The goal of achieving "the great rejuvenation of the Chinese nation", a prominent slogan in the Xi Jinping era, means, among other things, that China will move towards the centre of world politics and reshape parts of the existing international system to better serve its interests. China's leadership sees the intensified geopolitical rivalry with the United States as a phase in a global shift towards multipolarity, in which the United States and the West are losing power at the expense of developing countries and China. This shift is summarized in phrases such as "changes not seen in 100 years" and "democratization of the international order". Within this framework, China's relations with developing countries are used to promote these trends and counteract US global influence.

These overarching global interests form the outline of China's relations with Africa. Africa serves several functions in China's long-term global strategy. Strong bilateral and multilateral relations with Africa can translate into increased Chinese influence over the UN system and other international institutions, including through a propaganda strategy that pits developing countries (including China itself) against the West. Investments in African infrastructure serve the dual purpose of linking countries economically to China and securing their political support. China also has significant material interests in Africa, such as in strategically important mineral and energy resources, opportunities for military expansion and markets for the dissemination of Chinese technology and digital products. Overall, Africa increasingly appears as a part of China's sphere of influence, and a place where China has made good progress in achieving its global ambitions. This is linked to the fact that its major rival, the United States, has so far shown comparatively little interest in Africa. Compared to other regions, such as Southeast Asia, where the United States has engaged in an intense rivalry with China, Africa remains a region where the United States invests less political and economic capital in such competition.

This report is structured around five areas of inquiry: politics, trade, economic support, IT and telecommunications, and the military and security. It is based on open sources from the academic literature, think tank reports and official Chinese documents, as well as current statistics. The aim is to highlight how China's policies in these areas reflect its strategic interests. The emphasis is on China's actions in Africa rather than on the reciprocity of Sino-African relations. In this report, "China" does not refer solely to the Chinese state or the Communist Party. Much of China's activities in Africa are carried out through private and state-owned companies, which may only to a limited extent consider themselves to be acting in accordance with "China's" strategic interests. The term "Africa" in this report refers to the entire continent, not just sub-Saharan Africa, and includes not only states but also their populations and the diversity of actors within and between the countries of the continent. This diversity of actors naturally means that there are considerable variations and contradictory tendencies in China's approach to Africa. Although we sometimes supplement the overall picture by highlighting such nuances, the aim here is to bring out the main direction of China's strategic interests in Africa, which necessarily involves some simplification.

Politics

Africa is the continent that best illustrates China's political strategy on relations with developing countries. The Five Principles of the Non-Aligned Movement, first formulated within the framework of the Sino-Indian Treaty of 1954, provide the direction for China's political work with Africa. These principles are respect for the territorial integrity and sovereignty of countries, non-aggression, non-interference in the internal affairs of countries, equality and cooperation for mutual benefit and peaceful coexistence. As normative positions, they enjoy widespread acceptance in Africa. In its diplomacy with Africa, China emphasizes its status as a developing country, as well as China and Africa's "common struggle against imperialism" (see, for example, Xi Jinping 2021). In propaganda and diplomacy, China presents itself as an alternative development model and as proof that economic development and global influence can be achieved without embracing democratic values and liberal institutions. In recent years, these messages have been formalized within the framework of China's global initiatives, the Global Development Initiative (GDI), the Global Security Initiative (GSI), the Global Civilization Initiative (GCI), and most recently the Global Governance Initiative

(GGI), which together promote principles such as economic development as a human right, development as a prerequisite for security, equality between human civilizations and the right of every country to choose its political system in accordance with its cultural traditions.

All countries in Africa apart from Eswatini (also known as Swaziland) have diplomatic relations with China. Within the UN, China is the Security Council veto power that Africa as a whole is most politically aligned with, as measured by voting patterns. This has its roots in a fundamental consensus between China and Africa on many international issues, but Chinese economic influence has also played a role in the observed alignment. An important point on which China and Africa tend to agree is the idea that the United States and the West apply "double standards" on many issues, from climate action to the Palestinian question. Africa is also strongly inclined to follow China on issues where China has a more direct interest. For example, African countries rarely challenge China on issues concerning China's periphery and disputed territories, such as Taiwan, Hong Kong, Tibet, Xinjiang or the South China Sea. All of Beijing's diplomatic partners in Africa support the One China principle (that Taiwan is an inseparable part of the People's Republic) and all these countries have also declared that they "firmly [support] all efforts by the Chinese government" (i.e. without ruling out the use of force) to achieve the incorporation of Taiwan. African countries also mostly defend China's policies on its Muslim minority, despite allegations of genocide against the Uighurs, and tend not to back Western human rights criticisms of China. As a whole, Africa provides important support for legitimizing China's authoritarian political values internationally.

China's most important forum for cooperation with Africa is the Forum on China-Africa Cooperation (FOCAC). Its summit is held every three years, the most recent in Beijing in 2024. Its first action plan from 2000 explicitly refers to establishing a "new world order" in accordance with the interests of China and Africa. One of FOCAC's goals is to increase Africa's representation at the UN and on its Security Council. However, China does not support the African Union's more far-reaching proposals for UN reform, such as the Ezulwini Consensus or the Sirte Declaration, which call for two permanent African members of the Security Council. As China is a veto power in the Security Council, it is doubtful that its interests would be truly served by greater African representation in that forum.

Africa as a whole has a low level of political integration, however, and most of China's relations with Africa are bilateral. Many African countries have become reliable partners of China in a geopolitical sense. Since the FOCAC summit in 2024, China has entered into "strategic partnerships", which China forms with its more trusted international partners, with all of its diplomatic partners in Africa. At least 20 country partnerships with China have a higher designation, such as "comprehensive" or "all-weather", suggesting a higher level of ambition for China's strategic coordination with the country in question.

An important part of China's political ties with Africa is the Communist Party's cooperation with political parties through its International Department (CCP-ID). The Communist Party's position as the ruling party of China means that exchanges between African parties and the CCP-ID often take the form of parallel diplomacy. The CCP engages in exchanges with all kinds of African parties, in both democracies and authoritarian states, but these collaborations take on special significance in countries where a single African party has a corresponding position of power at home. In several countries, particularly in southern Africa, a party that emerged from the liberation movement has been in power continuously since independence. These include the CCM in Tanzania, Frelimo in Mozambique, the MPLA in

Angola, Zanu-PF in Zimbabwe, SWAPO in Namibia and the ANC in South Africa, as well as the FLN in Algeria in North Africa.

The CCP's exchanges with these parties are particularly long-standing and institutionalized, and based on fundamental ideological similarities. These parties (most of which govern authoritarian states) often cite China and the CCP as an explicit role model. The CCP uses these exchanges to export China's political model to Africa. This is done, among other things, through training for African politicians and study trips to China. In this way, China promotes various elements of the Chinese system, such as a development strategy focused on industry and infrastructure, special economic zones and party building based on the CCP model. The Julius Nyerere Leadership School, which was founded in Tanzania in 2022 by six ruling former African liberation movements with the support of the CCP Party School, is modelled on China's system of governance. It aims, among other things, to strengthen the stability of the de facto one-party states that its members represent.

African public opinion is generally positive towards China, but this varies considerably between countries. Until recently, however, views of China have not been more positive than those of the United States. The United States has also been seen as a better development model. However, some studies indicate that this has changed since Trump's return to power in 2025, and that China is now the more popular of the two superpowers in Africa.

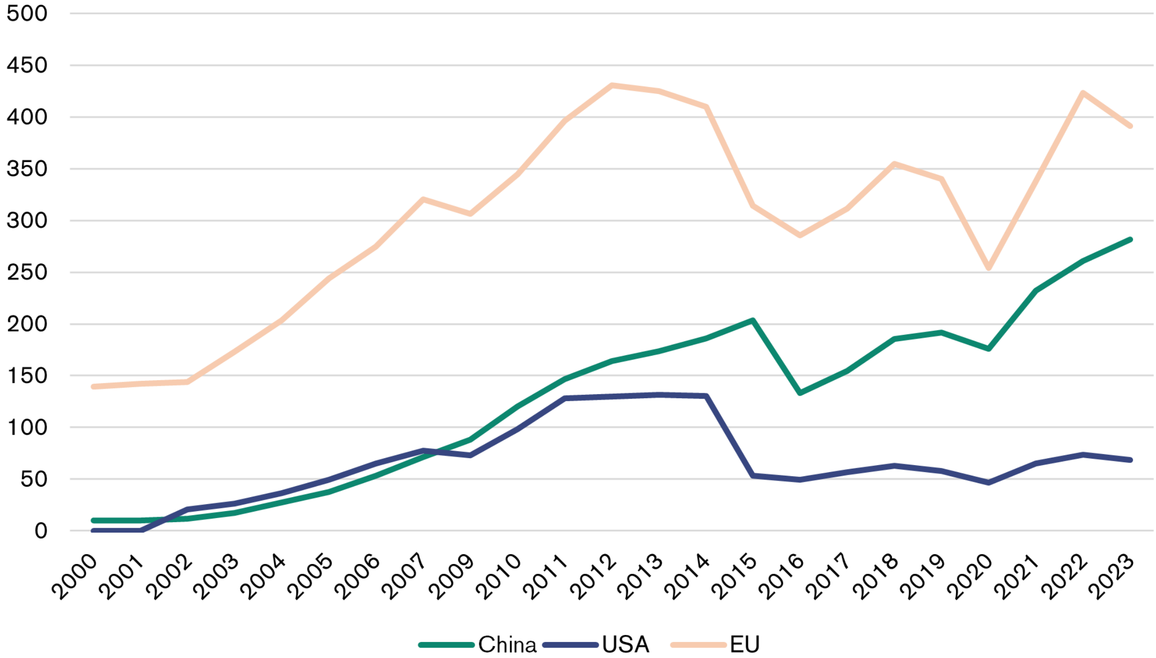
In relation to the growing rivalry between the West and China, however, it is important not to exaggerate the degree of political alignment between China and Africa. Africa has a high degree of agency in relation to China, and most countries in Africa want good relations with both the West and China. This approach has been described as "omni-alignment" and could include attempts to play the superpowers off against each other. China's message that Africa naturally belongs in China's camp should therefore not be accepted uncritically.

Trade

China's trade in goods with Africa has increased from US$11.7 billion in 2000 to a historic level of US$295 billion in 2024. Although the European Union (EU) remains Africa's largest trading partner, at least 15 African countries, including some of Africa's largest economies such as South Africa, the Democratic Republic of the Congo (DRC) and Angola, have shifted since 2002 from having the EU or the US as their largest trading partner to having larger trade relations with China.

At the beginning of the 2000s, trade between China and Africa was largely balanced at the beginning of the 2000s. Since 2012, however, the value of Africa's imports from China has grown more than the value of exports to China, resulting in a persistent African trade deficit. In 2024, Africa's trade deficit with China was $62 billion. Trade relations between China and Africa are also unbalanced in the sense that Africa's share of China's trade is small, while China is a very important market for Africa, in terms of both exports and imports. Africa accounts for about 5 per cent of China's global trade, although it should be kept in mind that Africa only accounts for around 2.5 per cent of global GDP. At the same time, about 20 per cent of Africa's exports go to China, and imports from China account for about 16 per cent of the continent's total imports. Trade between Africa and China is largely an exchange of raw materials for finished products; 89 per cent of Africa's exports to China are from the extractive sector. The most important product categories are crude oil, fossil fuels, copper, iron ore and aluminium. Conversely, 94 per cent of Africa's imports from China are manufactured goods, such as telecommunications equipment and textiles. China's growing industrial overcapacity is a structural factor driving the increase in its global exports and its trade surplus with Africa.

Figure 1 Africa's total trade with China, the USA and the EU, 2000–2023 (billion USD)



Source: UN Comtrade

South Africa, Nigeria and Egypt are the largest importers from China. African countries' share of imports from China is relatively uniform across the continent. In terms of exports to China, however, a number of countries stand out. Angola, the DRC and South Africa are the largest exporters. South Sudan, the DRC, Angola, Eritrea and the Republic of the Congo all send over 50 per cent of their exports to China, while the average is 15 per cent. Together, these countries produce the majority of Africa's mineral resources and have benefited from China's high demand for raw materials.

The import of raw materials from Africa is strategically important for China. Africa's oil exports have long helped to meet rapidly growing Chinese demand. However, China has increased its oil imports from the Gulf states, Russia and Asia, and now buys and consumes less oil from African countries. Today, China imports around 10 per cent of its oil from Africa, down from around 30 per cent in 2011. Between 2019 and 2023, China's oil imports from all African countries declined, with the exception of Chad. The degree of decline varied from 5 per cent (Equatorial Guinea) to 77 per cent (South Sudan). In 2023, the share of mineral fuels in Africa's exports to China plunged to 33 per cent, a decline from 70 per cent in 2006.

In contrast, the trade in African minerals is growing in importance and now constitutes one of China's most important interests in Africa. Copper, iron and aluminium are used as inputs in the supply chains for Chinese green tech, such as EV batteries, solar panels and wind turbines. The value of Africa's mineral and metal exports to China reached nearly US$50 billion in 2021. In 2023, minerals and metals accounted for 45 per cent of Africa's total exports to China, a rapid increase from around 20 per cent in 2015. China imports around one-third of Africa's mineral and metal exports, making it the largest single buyer.

This exposure to China makes resource-rich African countries vulnerable to changes in Chinese demand. The added value for African countries is also limited by the fact that the natural resources extracted in Africa are processed in China. A large proportion of these African raw materials is used to manufacture technology that China then exports to other countries, but rarely to Africa. This means that African countries largely do not benefit from the added value or the wider economic advantages generated by the natural resources they export.

Economic support

Economic support in the form of loans, investments and aid to Africa has long been a central part of China's economic engagement in the region. China's large currency reserves have been an important enabler of this support. Throughout the 2000s, China's support for Africa grew very rapidly, but it entered a precipitous decline after peaking in 2016–2018. At the most recent FOCAC summit in September 2024, Xi Jinping pledged to contribute US$51 billion to Africa over the next three years. This represents an increase compared to recent years, but is still significantly lower than before the pandemic. The decline since the peak years reflects both the slowdown in China's economy and its adjusted strategy for engagement with Africa.

Lending

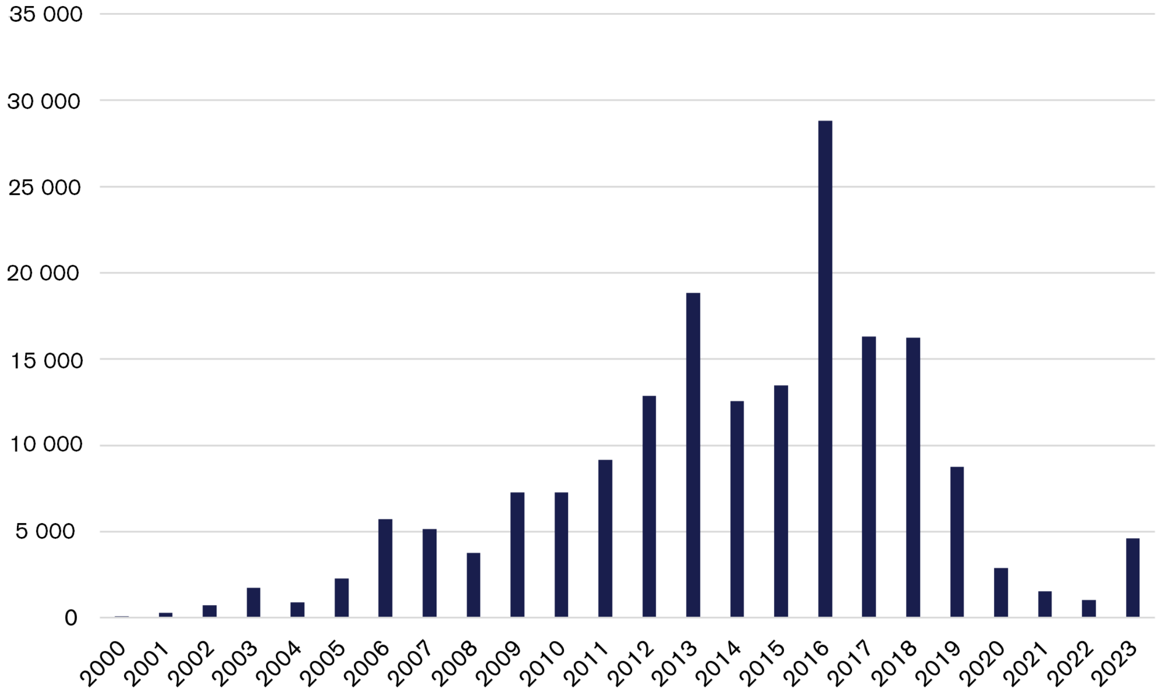
After trade, lending accounts for the largest share of China's economic engagement with Africa. China has gradually become Africa's largest bilateral lender.[1] Between 2000 and 2023, Chinese lenders provided $182 billion in loans to African countries. The largest borrowers were Angola, Ethiopia, Egypt, Nigeria and Kenya. Most Chinese loans are to the energy, transport and IT sectors.

The primary lenders have historically been policy banks, the state-owned financial institutions that support and promote the Chinese government's political objectives. Prime examples are the Export-Import Bank of China (EXIM Bank) and the China Development Bank (CDB). Together, these institutions account for 83 per cent of China's total financing in Africa. However, a relatively new trend is for policy banks to play a less prominent role, while commercial banks and China's central bank (PBOC) increase their lending. At the same time, bilateral loans have declined in favour of syndicated loans through multilateral institutions, such as the African Export-Import Bank, a pan-African financial institution. Since syndicated loans involve several lenders joining forces to lend to a borrower, thereby spreading the risk among them, the increase in syndicated loans probably reflects Beijing's desire to avoid direct exposure to debt-ridden African countries.

Chinese lending to Africa is largely driven by China's own economic and political interests. China imposes few political conditions on this type of assistance beyond the minimal requirement to support China's core interests, such as not recognizing Taiwan. However, the loans often come with requirements to use Chinese contractors and suppliers. China also prefers to lend to creditworthy countries, as well as to countries that vote with China in the UN General Assembly. This contrasts with the development needs that often guide western lending to Africa.

Since 2016, China's lending to Africa has steadily declined (see Figure 2). Existing debt burdens and increased borrowing costs leave little room for African countries to take on additional debt. Africa does not currently occupy a particularly prominent place in China's lending. In 2020, for example, China provided more loans to Pakistan than to its five largest recipient countries in Africa combined. A related trend is that China's investments in Africa have grown larger than its lending. In 2023, the volume of Chinese loans to Africa increased for the first time in seven years, but at a much lower level than the historic peak. Whether this trend will continue remains to be seen. Weaker economic growth and domestic challenges might make it difficult for China to continue to devote resources to lending in the future.

Figure 2 China's lending to Africa, 2000–2023 (US$ million)



Source: Boston University Global Development Policy Centre

Investments

China invests less in Africa than traditional investors, such as western countries and established multilateral institutions. At the same time, however, Chinese investment in the region has increased and plays a significant role in the Belt and Road Initiative (BRI). As in the case of trade, domestic overcapacity in China's subsidized infrastructure sector has historically been a driving factor in foreign investment. However, Africa still accounts for a very small share of China's total foreign direct investment (FDI). In 2021, Africa accounted for just over 3 cent of China's total FDI.[2] From Africa's perspective, however, Chinese investment has become increasingly important, accounting for nearly 20 percent of non-African greenfield FDI in Africa in the period 2017–2022.

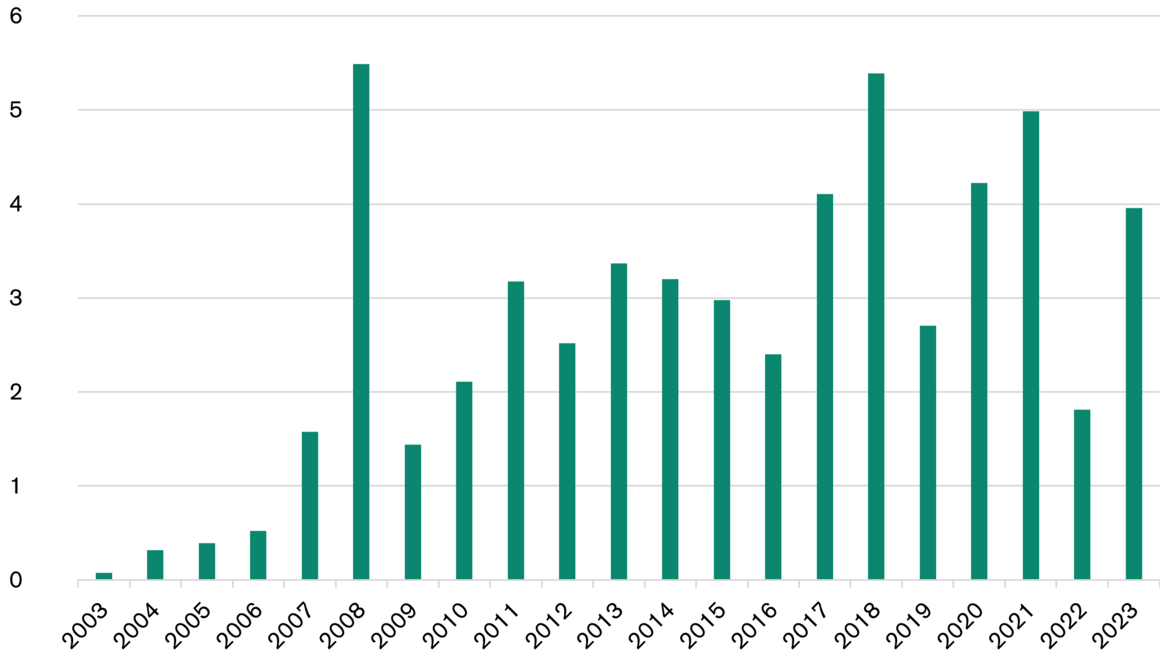
China's investments in Africa are currently concentrated in sectors such as mining and energy, but also some manufacturing. State-owned enterprises play a leading role. Investments in the extraction of raw materials such as copper, aluminium and iron ore dominate. In addition, China's investments are geographically concentrated. As in the trade sector, resource-rich countries attract the largest share of Chinese FDI. In 2023, the top five African destinations for Chinese FDI were Niger, South Africa, Angola, Morocco and the Republic of the Congo.

Investments in Africa's mining sector have a particular strategic importance. Although direct ownership by Chinese companies accounts for only about 8 per cent of the sector's production, China is by far the largest buyer in the sector and dominates the supply chains for most minerals that the US and the EU consider critical for economic growth. In the DRC, which produces 80 per cent of the world's cobalt, Chinese companies and financial institutions control 80 per cent of the production. Chinese companies are also moving towards near-total dominance in Africa's rapidly growing lithium production. Many of these critical minerals are necessary for the defence industry and green technology, and a stable supply is therefore essential for Sweden's and Europe's green transition and national security. The United States is almost 100 per cent dependent on China for several important critical minerals. There is a growing awareness of this problem and the EU has begun planning for an increased presence in Africa's mining sector. Most indications are, however, that China will continue to dominate the sector for a long time to come.

At the third BRI forum, held in October 2023, Xi Jinping signalled a shift in the Chinese state's investment priorities. The focus will now be on 'small but beautiful' projects that aim to improve living standards, green development, the digital economy and high-tech innovation. Quality will take precedence over quantity, which means that grandiose and costly visions, such as linking central Africa to the BRI in integrated transport corridors, such as the Kenya Standard Gauge Railway, have been gradually abandoned. At the same time, this changing investment strategy does not mean that China will stop investing in projects to increase bilateral trade with African countries. There is also a long-standing ambition to contribute to Africa's industrial capacity, which was reiterated at the latest FOCAC summit. This is in line with the wishes of several African governments to reduce their dependence on raw material exports and diversify their economies. However, the majority of Chinese investments continue to be in infrastructure, mining and similar sectors. For example, Chinese companies continue to invest millions in critical minerals to secure their supply.

However, the declining relative importance of infrastructure projects is noticeable in the activities of Chinese construction companies on the continent. The annual revenues of these companies peaked in 2015 at $37 billion. In parallel with the growth of Chinese companies, the number of Chinese workers in Africa also increased, especially in countries with large construction projects. However, as a result of China's declining economic engagement, the number of Chinese workers in Africa has steadily declined in recent years, especially since the COVID-19 pandemic. China's investments in Africa's infrastructure have contributed to economic growth. However, from Africa's perspective, there have also been some disadvantages to these investments. For example, many are characterized by a lack of transparency, which makes it difficult to assess the full economic and political consequences. In addition, the financial terms of Chinese loans are often less favourable than those offered by western actors or multilateral development banks. African countries therefore face a balancing act. They can benefit from rapid and extensive infrastructure development, but at the same time risk high levels of debt and long-term economic consequences linked to Chinese investment.

Figure 3 Chinese foreign direct investment in Africa, 2003–2023 (US$ billion)



Source: *China Africa Research Initiative*, Johns Hopkins University's School of Advanced International Studies

Aid

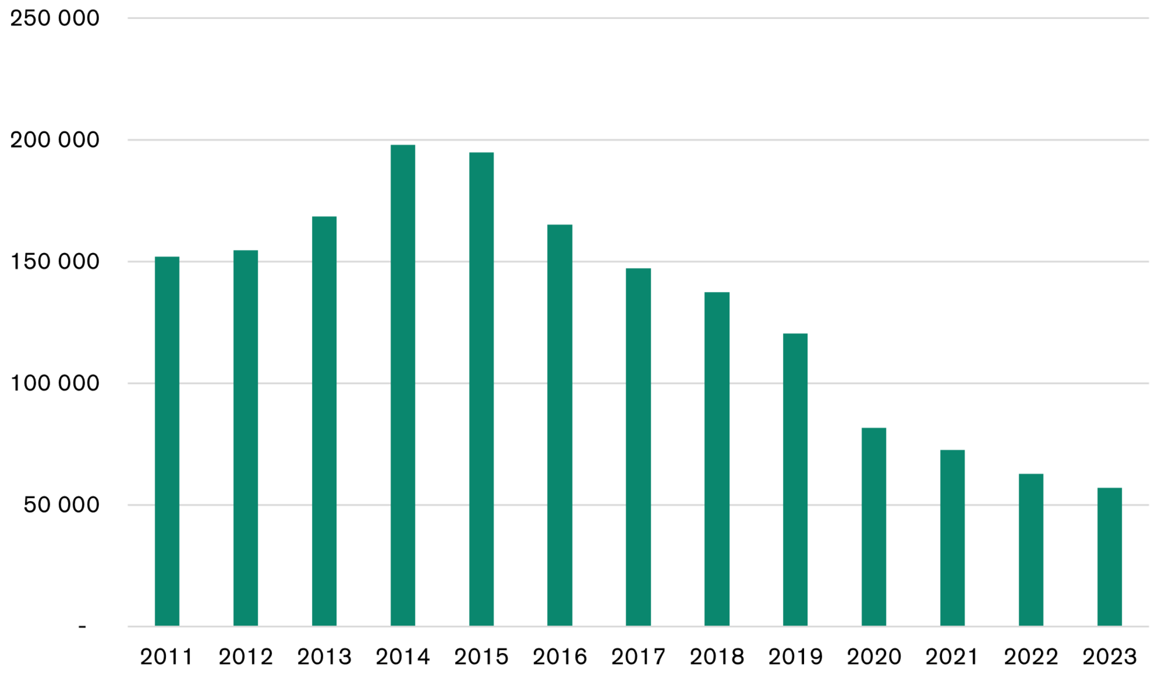
China's view of foreign aid differs significantly from that of traditional western donors. The Chinese state has criticized what it sees as a western focus on poverty reduction, social welfare and political reform, arguing that such aid, when tied to political conditions, is an immoral model that does not benefit developing countries. China sees its infrastructure projects as a form of aid and wants them to be regarded as such by others.

At approximately $3 billion in 2021, China's traditional aid to Africa is therefore relatively small compared to western donors, including the United States before the Trump administration's 2025 closure of USAID. Unlike western donors, which often provide aid in the form of grants on favourable terms, a large part of China's economic support comprises export credits and loans at market interest rates. This means that most of China's financing in Africa is development financing rather than traditional aid. China is not a member of the OECD's Development Assistance Committee (DAC) and calls itself a "South-South cooperation partner" rather than a donor country. This reflects China's preference to position itself as an equal partner with recipients and to contrast itself with western aid donors.

China's economic support to Africa: development or debt trap?

There is disagreement among policymakers, researchers and international organizations on whether China's economic support to Africa is contributing to the continent's development and socio-economic transformation. China's development financing has helped to improve infrastructure, resulting in short-term economic growth in some African countries. However, critics have accused Beijing of engaging in debt trap diplomacy, deliberately trapping borrower countries by offering loans that they cannot possibly repay, thereby gaining political influence over borrowers. At the same time, it is difficult to prove that China deliberately burdens borrowing countries with debt to pursue its own strategic interests. The data also

Figure 4 Number of Chinese workers in Africa at end of year, 2011–2023



Source: National Bureau of Statistics of China

shows that debts to Chinese lenders account for a relatively small proportion of Africa's total debt, at around 12 per cent. Even if China has not caused Africa's debt problems on its own, however, it is often a key player in debt relief processes, but China's actions in these processes vary from country to country. China's initial instinct was to try to resolve debt problems on its own. The restructuring of Angola's loans with the China Development Bank in 2020 is an example of bilateral, ad hoc debt relief. Since the COVID-19 pandemic, however, China has become increasingly involved in multilateral debt relief initiatives. For example, China, together with France, led the creditor countries' negotiations with Ethiopia on its 2024 reconstruction agreement with the G20 countries. At the same time, unresolved conflicts of interest and mistrust between China and the West have meant that debt relief under the G20 Common Framework for Debt Treatments has become significantly less generous than before.

Corruption and a lack of transparency in connection with Chinese loans and investments present a growing image problem for China. There are already several examples of how this has led to a political backlash for China in certain African countries. In Zambia, which has major Chinese investments in the copper industry, anti-Chinese sentiment has at times been an important element of the political debate. In Sierra Leone, political parties have accused China of election interference and collusion with the ruling party. This could be a contributing factor to the significant decline in the amount of economic support China provides to Africa.

IT and telecommunications

China cooperates extensively with African countries on IT and telecommunications. IT investments in Africa are part of the so-called Digital Silk Road, a central part of the BRI initiative aimed at expanding communication technology on a global scale, thereby creating a more China-centric global digital order. By building telecommunications networks, digital infrastructure, and so on, China is strengthening its position as a key partner of African countries. This also helps to embed Chinese technical standards in Africa's digital ecosystem, which could limit market access for China's western competitors. It could also give China control over data systems, which might prove advantageous in the development of AI and surveillance technology. The African environment is generally politically favourable for such activities, as IT is not a particularly politicized issue in Africa in comparison with, for example, Europe. Ethiopia, Nigeria and Cameroon are the countries that have received the most funding from China for IT and telecommunications. Zambia, Angola and Ghana are also important recipient countries.

Telecommunications is an area where Chinese companies enjoy particularly important comparative advantage in Africa. Companies such as Huawei and ZTE now offer products of a quality that is fully comparable with their western competitors, but at a slightly lower price. Huawei is the most important player and has already built over 50 3G networks in 36 African countries, as well as, according to a figure that is often cited, 70 per cent of the continent's 4G networks. In many countries, Chinese companies in Africa have the advantage of building IT infrastructure from scratch, which leads to a path dependence that makes it natural to continue with Chinese suppliers. However, Chinese dominance is not absolute. For example, as recently as 2022, China's large presence in Ethiopia's telecommunications market did not prevent Addis Ababa from using Nokia for an infrastructure expansion worth US$500 million. Chinese companies also dominate certain other IT sectors. For example, Chinese Transsion Holdings is the largest supplier of mobile phones in Africa and offers models specifically adapted to African needs. However, Chinese players do not have the same dominance in areas such as submarine cables or data centres.

The West, in particular, often describes China's digital expansion in Africa in negative terms. Critics argue that it fosters an exclusive dependence on Chinese products, which will force Africa eventually to accept Chinese surveillance and control over African data. The perception of China's investments as threatening has created a backlash, leading the EU and the US, among others, to seek to compete with China. Digital infrastructure is, for example, a central component of the EU's global infrastructure initiative, Global Gateway, which involves €150 billion in promised investments on the African continent. The United States has also launched infrastructure programmes in Africa, such as in the G7 Partnership for Global Infrastructure and Investment (PGII), which has important IT components. Overall, the financing of Africa's IT development is currently fairly diversified, with important contributions from African governments, China, the EU and US Big Tech. Nonetheless, China's position is expected to remain strong.

Security and the military

Africa is not an important military arena for China. China has not published a military strategy for Africa. China's main military interest in Africa is to defend the sea lanes that cross the Indian Ocean, which are critical to China's energy security. The Chinese Navy currently has six to eight warships in the Indian Ocean at any given time, but this number is expected to increase. The United States has a large presence in the Indian Ocean and China's presence has led some US researchers to discuss China as a possible future challenger in the region. While China is unlikely to be able to compete militarily with the United States in the region for many years to come, if the United States were to become distracted from the region, China's presence could become relatively more significant. India also views China's presence as threatening and tends to perceive it as directed against India. Overall, however, China's military activities in the region are primarily cooperative and thus consistent with international norms.

China has had a naval base in Djibouti since 2017. The US think tank RAND believes that the base is primarily motivated by domestic needs, such as the ability to credibly protect Chinese citizens in Africa, rather than competing militarily with the United States. China could acquire more military bases in Africa. A more likely development is that China will continue to build more dual-use ports. Investment in such ports is a discreet way of enabling the future deployment of military resources in the region. West Africa is of particular interest, as bases there would expand China's footprint into the Atlantic and might eventually alter the military balance of power with the United States there. A naval base in West Africa would put Chinese military forces within striking range of NATO countries. Possible locations for new naval bases include Equatorial Guinea, Cameroon or Mauritania.

China also has a number of security partnerships in Africa, in which it mainly acts in accordance with international norms. Many of these partnerships are not particularly strategic in nature, but instead involve military and police training and military exercises. They should perhaps be seen more as a way of establishing and maintaining political ties. China also sells arms to Africa and has become the largest supplier of conventional weapons to sub-Saharan Africa, mainly due to the decline in Russian exports as a result of the war in Ukraine.

In recent years, China has begun to take a greater role in various mediation efforts in Africa. However, China's mediation activities have certain inherent limitations, not least China's stated principle of non-interference in the affairs of other countries. What mediation there is must harmonize with this principle, and therefore mostly focuses on conflict management rather than conflict resolution. In cases of internal conflicts within a country, China works almost exclusively with the government. Among the conflicts in which China has been most involved are those in Sudan (including between Sudan and South Sudan and within South Sudan). However, China adopts a clear position on the root cause of conflicts in Africa: the lack of development. The strong link between development and security is the basic idea behind China's Global Security Initiative (GSI). China has launched an initiative on peaceful development in the Horn of Africa, through a special envoy, and takes the position that the conflicts in the region have been caused by foreign intervention.

Policy recommendations

- Among other things, the EU defines China as a systemic rival. Africa is an important neighbour for Europe. European countries should therefore invest in systematic analyses of Europe's interests in Africa and how those interests are being challenged by China's presence.
- Europe should take advantage of the desire of African countries to diversify their relations in various areas, such as IT and mining, where such an ambition exists. Not being overly exposed to China often has intrinsic value for African governments.
- Europe has important comparative advantages in the IT field, not least as the home of the two telecoms giants, Ericsson and Nokia. European countries should undertake policy coordination with the European telecoms sector to analyse how its position can be strengthened in Africa. One objective would be to prevent China's technical standards in the IT field from being more widely adopted globally.
- European countries should continue efforts to establish partnerships with African countries on minerals and metals, based on an analysis of vulnerabilities and dependencies, in order to minimize China's ability to use its dominance in rare earth elements and other areas as a weapon in a geo-economic conflict.
- European countries should develop more partnerships with African countries based on the principle of mutual benefit and equality rather than an aid perspective. They should refrain from criticizing African countries' cooperation with China on ideological grounds in a way that reinforces the view that western countries are primarily interested in political reform.

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About the Swedish National China Centre

The Swedish National China Centre was established in 2021 as an independent unit at the Swedish Institute of International Affairs (UI). The Centre conducts policy-relevant research and aims to contribute to a long-term improvement in the state of China-related knowledge in Sweden. UI's publications undergo internal quality control. Any views expressed are those of the authors.

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Endnotes

1 There are certain difficulties in obtaining a comprehensive picture of China's loans to Africa. First, Chinese lenders rarely disclose amounts or terms publicly. Second, China is not a member of the Paris Club, an informal group of official creditors tasked with finding coordinated and sustainable solutions for debtor countries with repayment difficulties.

2 The majority of China's FDI goes to Latin America and Asia. However, more than half goes to Hong Kong, which indicates some uncertainty in the data, as Hong Kong is unlikely to be the end destination for all those investments.