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# China's Engagement in Africa: Activities, Effects and Trends

CGS Global Focus | June 2022



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## Executive Summary

Of 54 African countries, 52 have already signed a BRI (Belt & Road Initiative) Memorandum of Understanding with China by April 2022, a clear indicator that the flagship project of Chinese foreign policy of the 21st century is penetrating the whole African continent.

After the BRI 1.0 phase of engagement and negotiations with local Africans and with the international community, Chinese investment patterns and sectors in Africa are poised for a major reorientation in the BRI 2.0 phase.

China acts as a newcomer in the landscape of Africa's Special Economic Zones (SEZs) and Economic and Trade Cooperation Zones (ETCZs). But the country's tiny share on total SEZs in Africa (less than 0.3 per cent) indicates that Beijing seems to have no desire to spread its development model to Africa and to try to "colonize" the continent with Chinese system, philosophy, institutions and business model.

For more than 10 years, annual Chinese FDI flows to Africa remained relatively stable – from a mere \$2.1 billion in 2010 to almost \$5.4 billion in 2018 with the only exception of 2019 in which Chinese FDI flows to Africa 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 of 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 swung up again to \$4.2 billion.

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. 63 per cent of all Chinese FDI in 2020 was focused on only ten countries: South Africa, Democratic Republic of Congo (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.

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 ways for investing in the African services sector such as scientific research and technology services, transport, warehousing, smart cities, and postal services.

China-Africa trade reached a record high of \$254 billion in 2021 boosted by an impressive increase of 35 per cent in comparison with 2020. Whether it keeps a long-term trend or a flash in the pan remains to be seen. Nevertheless, this strong increase is remarkable. Particularly since it is made up of an increase in both Chinese exports to Africa (29.9 per cent year-on-year) and imports from Africa (43.7 per cent year-on-year).

The top 10 African trading partners of China account for more than 66 per cent of the trade volume between China and Africa. Topping the list is South Africa, which accounts for \$54 billion or 21 per cent 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 per cent more goods to China, Sao Tome and Principe imported three times the volume of Chinese goods compared to the previous year even though both of them did not join the BRI until 2021.

With 18 per cent 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 per

cent of its own debt ratio. By doing so, the country presents itself as a Master of “Debt Relief” instead of a “Debt Trap”.

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 comes out as a country that is temporally earlier than the United States (US) and spatially wider than the European Union (EU) in providing Africa with COVID-19 vaccines and other anti-corona materials.

With the prospect that the COVID-19-pandemic will continue, 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 & investment in pharmaceutical products, the long-term trend in the area of investment and trade is not clear.

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 is seen that China is starting to pay more attention to the impact of Chinese investment and construction on the natural environment, as well as on the socio-cultural level.

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 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, China has become the biggest contributor to military observers, verifiers, inspectors, police operations as well as peacekeeping troops by order of the United Nations (UN).

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 US which place a heavy 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 of increasing importance today, means the ability to get desired outcomes in international affairs not by (military) coercion or (economic) inducement, but by (cultural) attraction. Africa is sensing a China that recognizes this sort of power. Indeed, most African countries are first-hand experiencing strong inflows of Chinese soft power elements.

The “Big Four” in Chinese international media presence (Xinhua News Agency, Central China Television, China Radio International, and China Daily) have stepped up their game of late – and Africa has become a key target across the board. At the same time, the number of Chinese Confucius Institutes has increased globally over the past few years to about 550 today. In Africa, they rank now second only 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 the leading countries of origin.

However, even China has become a major player in the race for soft power in Africa and around the world, opinion polls and surveys indicate some concerns regarding Chinese perceptions 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 effect 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 from 1.0 to 2.0 requiring Chinese corporations to create more jobs for local societies. Chinese visits 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, as well as the lack of medical infrastructure in Africa.

## Introduction

From the vantage point of global diplomacy, Africa's unique advantage is its large number of states which constitute "a voting block of 28 per cent at the United Nations (UN)"<sup>1</sup>. In terms of geopolitics, the continent presents itself as an indispensable maritime gateway from Asia to Europe and conversely. Geo-economically, Africa with a population of 1.3 billion and a land area of 30.37 million sq km, bestowed with considerable resources, still remains an uncharted territory with huge potential to reach the centrality of global economy in the coming decades. As Michelle D. Gavin, former US 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."<sup>2</sup>

In contrast to the US which has deployed more than 6000 troops "on the ground in Africa"<sup>3</sup>, China has basically chosen an economic way 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 (finished in 1976), where China sent around "56,000 engineers and workers" to build 320 bridges, 22 tunnels and 93 stations.<sup>4</sup>

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, as a 341 km part of a railway infrastructure connecting the Indian Ocean port of Dar es Salaam with Tanzania's interior.<sup>5</sup> Even more than railways, Chinese companies have been the leading actor in African dam projects, only surpassing Chinese construction activities in Southeast Asia.<sup>6</sup> Most recently, the Ethiopian renaissance dam, the biggest and one of the most controversial dam projects in the last decade, was finished 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.<sup>7</sup>

However, the tide seems to be changing. Chinese activities in Africa that 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 a centrality in creating connectivity between Asia and Europe. The program aims at connecting "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."<sup>8</sup> For Beijing, Africa is

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<sup>1</sup> Chanaka, Teshome Toga: China-Africa cooperation. (Center for China and Globalization, April 4, 2022), accessed on April 4, 2022, at <https://mp.weixin.qq.com/s/EI6BaD3L1T5ByNFi78nW-g>.

<sup>2</sup> 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 on April 22, 2022, at <https://www.cfr.org/report/major-power-rivalry-africa>.

<sup>3</sup> Ibid., p. 4.

<sup>4</sup> "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 on April 5, 2022, at <https://www.globaltimes.cn/page/202106/1226766.shtml>.

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

<sup>6</sup> The New Great Walls. A Guide To China's Oversea Dams Industry (International Rivers, Second Edition, November 2012), accessed on 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, Vol. 26, No. 4, 2009, pp. 43-51.

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

<sup>8</sup> Arase, David: THE BELT AND ROAD INITIATIVE ENTERS A SECOND PHASE, in: Asia Global Online, April 15, 2021, accessed on April 22, 2022, at <https://www.asiaglobalonline.hku.hk/belt-and-road-initiative-enters-second-phase>.

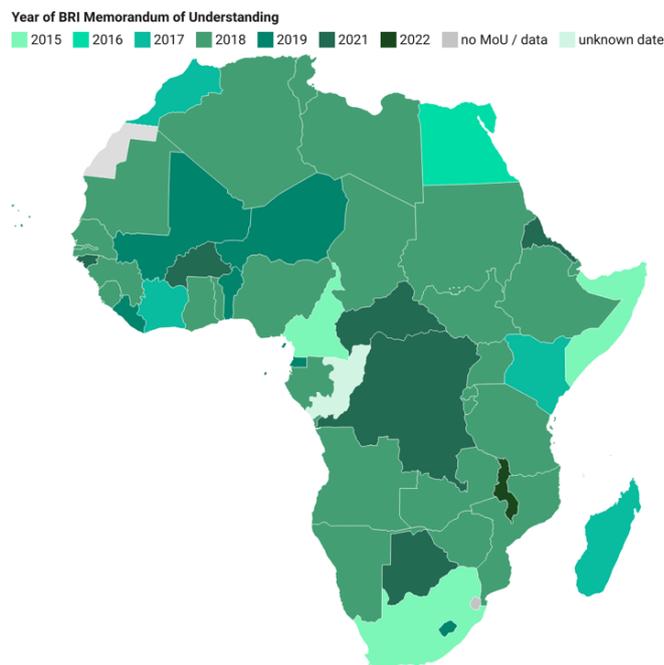
indispensable for keeping its “Maritime Silk Road” strong and effective. To this purpose, the country is fervently in the process with its African partners to pool together the coastline of the continent with ports, digital infrastructures, airports, healthcare services, and “smart cities”, one of the 20 megatrends found by this study.

They demonstrate that China’s engagement in Africa is fully integrated into the BRI 2.0 starting from 2019/2020. The BRI 2.0 is a revision to the 1.0 overhauling the most negative and high-risk elements of the initial phase (2013-2019). More “green”, more “sustainable”, more “digital” as well as more “healthcare” are the pledges of Beijing to Africa. The 20 megatrends confirm the wiliness of Beijing to implement this new agenda for Africa, leaving, however, the question open, of whether and to what extent the promises would become entirely reality in the foreseeable future.

## 1. China’s “Belt and Road Initiative” and “Special Economic Zones” in Africa

The Belt and Road Initiative (BRI) is China’s major foreign policy directive since 2013, effective for Africa since 2015. By simply looking at a map of the African continent, the BRI seems to be a success story. Out of 54 countries reviewed, 52 countries have already signed a Memorandum of Understanding (MoU) concerning the BRI, rendering these countries official participants. Among the first countries to sign a MoU were Cameroon, Somalia and South Africa as early as 2015. The most successful accession 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

### African Member States of the Belt and Road



Data as of April 2022.  
Map: C.Heidbrink (2022) • Source: Green Finance & Development Center • Created with Datawrapper

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 have not signed a MoU. In other words, around 96 per cent 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.

As the BRI has become China’s major foreign policy, it is hardly possible 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 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 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.

Special Economic Zones (SEZs) and Economic and Trade Cooperation Zones (ETCZs) have played an essential role in Chinese 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 means to promote Chinese engagement in the continent and to enhance the international competitiveness of Chinese companies in the world. All the more surprising is, therefore, the observation that Beijing's advance momentum of SEZs and ETCZs in Africa has noticeably diminished after the boom years in the wake of the country's entry into the WTO. Since 2007/2008 when all currently existing SEZs and ETCZs were established, no single new considerable SEZ or ETCZ has been established anymore. As the "Table: Chinese SEZs and ETCZs in Africa" shows, Beijing's advance of SEZs and ETCZs in Africa stagnates actually since years, at least at the quantitative level.

Chinese SEZs and ETCZs in Africa

Country	SEZ or ETCZ	Start	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 Beyond; China Railway	Transport equipment, textile and light industries, home appliances, telecoms
Nigeria	Ogun-Guangdong Free Trade Zone (OGFTZ)	2008	Guangdong Xinguang; 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

Table: Y. Huang (2022). Source: Alves, 2011.<sup>9</sup>

At the first Forum on China-Africa Cooperation (FOCAC) Summit held in Beijing in 2006, Chinese President Hu Jintao announced the establishment of 3 to 5 trade and economic cooperation zones in Africa in the years 2006-2009.<sup>10</sup> Quickly after the announcement and driven energetically by both governments, 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 obviously from the strategic interests of both sides: China is

<sup>9</sup> 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](https://media.africaportal.org/documents/saia_sop_74_alves_20110131.pdf), p. 6.

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

interested in Zambia's copper reservoirs and the market in Zambia, while Zambia desires to attract more investment and development chances, especially to "develop a manufacturing base around its mining sector".<sup>11</sup>

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). Almost at the same time, Ethiopia Eastern Industrial Zone is founded in 2007 and has been treated with great importance by the Chinese and Ethiopian governments.<sup>12</sup> 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 industries. Presently, the cooperation zone has become a significant platform for China-Egypt economic and trade cooperation.<sup>13</sup>

However, the fact that the number of Chinese SEZs and ETCZs in Africa has remained unchanged for years at the level of seven does not mean that Beijing had ceased to enhance the quality and effects of its SEZs and ETCZs in the continent. On the contrary, China's SEZs and the ETCZs in Africa have strongly focused on resource-rich countries (such as Egypt, Algeria, Zambia and Nigeria) with big populations (such as Nigeria, Egypt, Ethiopia and Algeria) demonstrating an impressive strategic clarity of its SEZ-ETCZ-Advance. All these SEZs and ETCZs have been massively promoted by the so-called "Going Global" strategy, a flagship project used by Beijing to enhance the globality of Chinese economy and corporations. They still enjoy, in fact, strong support from the Chinese government.

In recent years, however, a clear shifting of strategy has emerged. 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 have strengthened their trade ties, upgrading their existing ETCZ into a comprehensive free trade zone in southern central Africa.<sup>14</sup>

The quantitative stagnation of Chinese SEZs and ETCZs has obviously to do with 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 the 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 Memorandum of Understanding (MoU) to build a special economic zone, which will be a fulcrum of the Chinese Belt and Road Initiative (BRI).<sup>15</sup> Additionally, in 2016, China and Egypt governments agreed to expand cooperation under the BRI meeting especially the desire of Cairo to connect its own development plans with the BRI in the hope to attract more Chinese investment.

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<sup>11</sup> Meng, Guangwen, Sui, Nana and Wang, Xue: Construction and Development of the Zambia-China Economic and Trade Cooperation Zone, in: *Tropical Geography*, Vol. 37, No. 2, 2017, p. 246-257.

<sup>12</sup> China Services Info: Eastern Industry Zone, February 13, 2019, accessed on 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.>

<sup>13</sup> China Daily: China, Egypt joint hands to write new chapter of Suez Canal development, November 18, 2019, accessed on April 2, 2022, at <https://www.chinadaily.com.cn/a/201911/18/WS5dd23667a310cf3e355781bf.html>.

<sup>14</sup> ZDA: ZDA, ZCCZ, CCCI, BRJRC Collaborate to Create E-Commerce Industrial Park to Strengthen Trade Relations between Zambia and China, September 16, 2021, accessed on 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/>.

<sup>15</sup> China Daily: Touchroad Djibouti Special Economic Zone – African fulcrum of Belt and Road, August 12, 2016, accessed on April 5, 2022, at [https://www.chinadaily.com.cn/m/touchroad/2016-08/12/content\\_26451224.htm](https://www.chinadaily.com.cn/m/touchroad/2016-08/12/content_26451224.htm).

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.<sup>16</sup> The same is true for the inception of the “Eden Garden” located at the heart of Jinfei ETCZ with the goal to spread “smart city” in Mauritius.<sup>17</sup>

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. As early as in the 1970s, the first SEZs were established by African countries with their different foreign partners when China was yet in its swamp of “Cultural Revolution” leading 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 30 years ago, as a part of its strategy to embrace globalization. According to the United Nations Conference on Trade and Development (UNCTAD), there are, at the present time, 237 SEZs in Africa. The largest concentrations of them can be found in Kenya (61), Nigeria (38), Ethiopia (18) and Egypt (10).<sup>18</sup> Of 134 SEZs established in these “Top Five SEZ-Countries of Africa”, only four derive from China making a modest percentage of 0.3 per cent. This fact 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.<sup>19</sup>

Certainly, all SEZs between China and Africa are energetically supported by the Chinese government, which provides them a relatively stable investment and finance.<sup>20</sup> But China’s tiny share on total SEZs in Africa is quite revealing: There is no evidence indicating 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 model.

#### China in the landscape of African SEZs

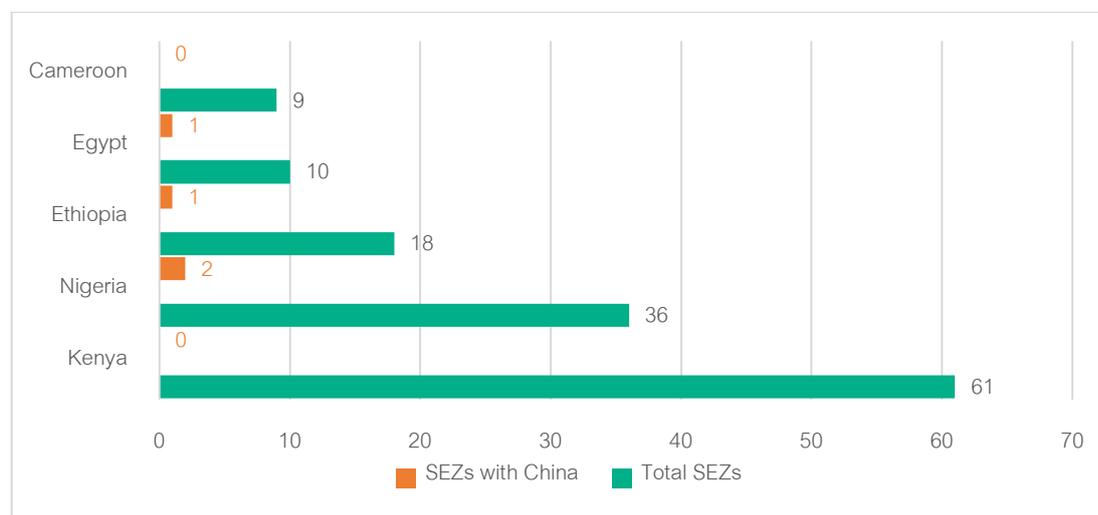


Chart: Y. Huang. Source: UNCTAD.

<sup>16</sup> ZDA, *ibid.*

<sup>17</sup> 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 on April 5, 2022, at [http://english.scio.gov.cn/beltandroad/2018-07/31/content\\_57904795.htm](http://english.scio.gov.cn/beltandroad/2018-07/31/content_57904795.htm).

<sup>18</sup> United Nations Conference on Trade and Development (UNCTAD): Handbook on Special Economic Zones in Africa. Towards Economic Diversification across the Continent 2021, accessed on April 12, 2022, at [https://unctad.org/system/files/official-document/diaeia2021d3\\_en.pdf](https://unctad.org/system/files/official-document/diaeia2021d3_en.pdf), pp. 35-36.

<sup>19</sup> *Ibid.*, p. 42.

<sup>20</sup> Rifaoui, Anass: Special Economic Zones in Africa (SEZs): Impact, efforts, and recommendations. (Infomineo, January 18, 2021), accessed on April 12, 2022, at <https://infomineo.com/special-economic-zones-in-africa-impact-efforts-and-recommendations/>.

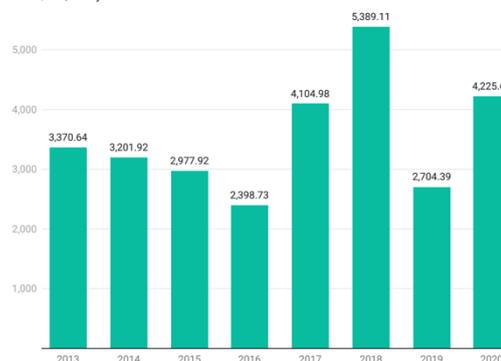
## 2. Trends and Destinations of China's FDI in Africa

Since the 1980s, China has begun its direct investments in Africa.<sup>21</sup> Chinese FDI have been declining between 2013 and 2016, whereas they jumped in 2017 and 2018. The peaking point with almost \$5.4 billion coincides with the aforementioned accession wave to the BRI, but was already cut back in 2019 before the COVID-19-pandemic. In 2020, Chinese FDI to African countries recovered, but did not reach the 2018-level. Overall, Chinese FDI flows have been volatile and do not indicate an overall expansion strategy. Nevertheless, these numbers do not feature all investments as they do not capture non-FDI investments or investments made by smaller or unofficial lenders.<sup>22</sup>

Chinese investments in the African continent focus on a selective number of markets. Construction with 35 per cent of total investments in 2020 makes up the largest margin, followed closely by mining with 21 per cent of investment in 2020. Other sectors such as manufacturing, financial services, leasing and business services are supported to a lesser degree. Additionally, the beneficiaries are not equally distributed over the continent. 63 per cent of all Chinese FDI in 2020 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.<sup>23</sup>

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 ways for investing in the African services sector such as scientific research and technology services, transport, warehousing, and postal services.<sup>24</sup> At the same time, Chinese FDIs flaws reveal that Beijing still remains keen on investing in the infrastructure of African countries. Regarding infrastructure ambition, Chinese and African interests overlap profoundly: Africa's large demands for gigantic projects such as airports, bridges, high ways, railways and hospitals for modern infrastructure meet Chinese huge infrastructure-building capacities that are hungry. China has, in fact, become the largest foreign investor in infrastructure in Africa.<sup>25</sup>

**Chinese Foreign Direct Investment Flow to Africa**  
in US\$ mn, unadjusted



Sources: 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. Data as of January 2022. US\$ mn, unadjusted. Chart: C. Heidbrink (2022) - Source: Johns Hopkins University SAIS China-Africa Research Initiative - Created with Datawrapper

Both China and its African partners seem to have recognized the necessity to upgrade the cooperation framework in order to make new investments more sustainable. In this context, the Eighth Ministerial Conference of the Forum on China-Africa Cooperation held in Dakar in November 2021, Senegal, has the prospect of becoming a new milestone in China's investment in Africa. In the key document "China-Africa Cooperation Vision

<sup>21</sup> Meng, *ibid.*

<sup>22</sup> Mitchell, Jason: What will Africa's FDI environment look like in 2030? Ask China..., Investment Monitor, January 4, 2022, accessed April 13, 2022, at: <https://www.investmentmonitor.ai/analysis/what-will-africas-fdi-environment-look-like-in-2030-ask-china>.

<sup>23</sup> Fu, Yike: The Quiet China-Africa Revolution: Chinese Investment. (The Diplomat, November 22, 2021), accessed on March 17, 2022, at <https://thediplomat.com/2021/11/the-quiet-china-africa-revolution-chinese-investment/>.

<sup>24</sup> Mitchell, Jason: What will Africa's FDI environment look like in 2030? Ask China... (Investment Monitor, January 4, 2022), accessed on April 9, 2022, at <https://www.investmentmonitor.ai/analysis/what-will-africas-fdi-environment-look-like-in-2030-ask-china>.

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

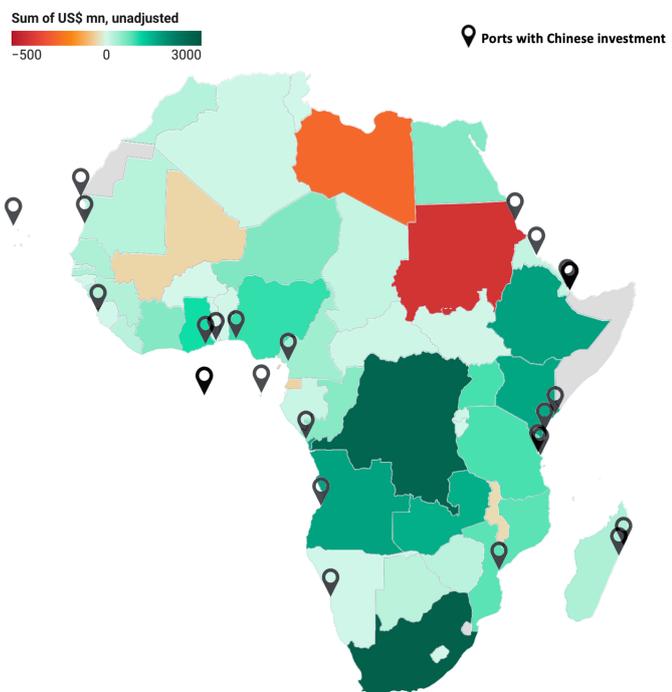
2035” adopted by the Conference based on the opening speech by President Xi Jinping, Beijing pledges to “invest another USD60 billion in Africa by 2035, especially in support of African agriculture, manufacturing, infrastructure, environmental protection, digital economy, blue economy, etc.”<sup>26</sup> 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].<sup>27</sup>

A glance at the map shows that China is investing particularly heavily in coastal regions, with port projects taking center stage in the course of the BRI. Around 45 per cent of all BRI projects concentrate on infrastructure projects including 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 and many more. In total, China has invested in over 74 African ports. The most famous case is probably the port of Djibouti. There, the People's Liberation Army (PLA) Navy built its first overseas military base, which has been in operation since 2017.

Additionally, China is investing in connectivity projects such as railroads (around 20 per cent of BRI projects) to append landlocked mining and energy projects to the emerging railroad system.<sup>28</sup> 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.<sup>29</sup> In this context, there are fears, mostly expressed by Western observers, that China could abuse its influence over these ports for its own strategic interests. This concerns both economic preferential treatment, such as for the transport of raw materials, finished goods and labor, and military purposes by monitoring and blocking overseas and deep-sea traffic.<sup>30</sup>

### 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.



Sources: 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.

Map: C. Heidbrink (2022) • Source: Johns Hopkins University SAIS China-Africa Research Initiative • Created with Datawrapper

Despite these headwinds and concerns, the majority of Africans by far welcome Chinese engagement. According to polls carried out by the Afrobarometer, a majority (63 per cent) of Africans consider China's economic and political influence in their country to be positive in 2021. Only a minority of 14 per cent consider it negative. Interestingly, the perceptions expressed about the influence of the USA in Africa are almost identical

<sup>26</sup> China-Africa Cooperation Vision 2035, accessed on April 12, 2022, at [http://focac.org.cn/focacdakar/eng/hyqk\\_1/202112/t20211210\\_10466585.htm](http://focac.org.cn/focacdakar/eng/hyqk_1/202112/t20211210_10466585.htm).

<sup>27</sup> Ibid.

<sup>28</sup> Lokanathan, Venkateswaran: China's Belt and Road Initiative: Implications in Africa, in: Observer Research Foundation (ORF), Issue Brief No. 395, 2020, accessed on March 24, 2022, at [https://www.orfonline.org/wp-content/uploads/2020/08/ORF\\_IssueBrief\\_395\\_BRI-Africa.pdf](https://www.orfonline.org/wp-content/uploads/2020/08/ORF_IssueBrief_395_BRI-Africa.pdf), p. 4.

<sup>29</sup> Weng, Lingfei, Xue, Lan, Sayer, Jeffrey, Riggs, Rebecca Anne, Langston, James Douglas and Boedhihartono, Agni Kliintuni: 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.

<sup>30</sup> Lokanathan, ibid., p. 4.

(60 per cent vs. 13 per cent).<sup>31</sup> The 2021 CMS survey also found that most African respondents (62 per cent) 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 wide shared expectations that the development of new BRI projects may help to offset the impact of the pandemic. The virus indeed had serious impacts on BRI projects as reported by the Chinese Ministry of Foreign Affairs.<sup>32</sup> It also shifted greater attention to the so-called Health Silk Road, which concentrates on the supply of medical infrastructure, goods and services.

### 3. China-Africa Trade in Change

Similar to FDI, China-Africa trade figures also show some irregularities. Bilateral trade initially peaked at \$203 billion in 2015, then, it declined to \$133 billion in 2016. The recent 35 per cent year-on-year (y-o-y) 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 in 2021 is remarkable. Particularly since it is made up of an increase in both Chinese exports to Africa (29.9 per cent year-on-year) and imports from Africa (43.7 per cent year-on-year).<sup>33</sup>

The top 10 African trading partners of China account for more than 66 per cent of the trade volume between China and Africa. Topping the list is South Africa, which accounts for \$54 billion or 21 per cent 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 per cent more goods to China, Sao Tome and Principe imported three times the volume of Chinese goods

#### China-Africa Trade at Record High

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

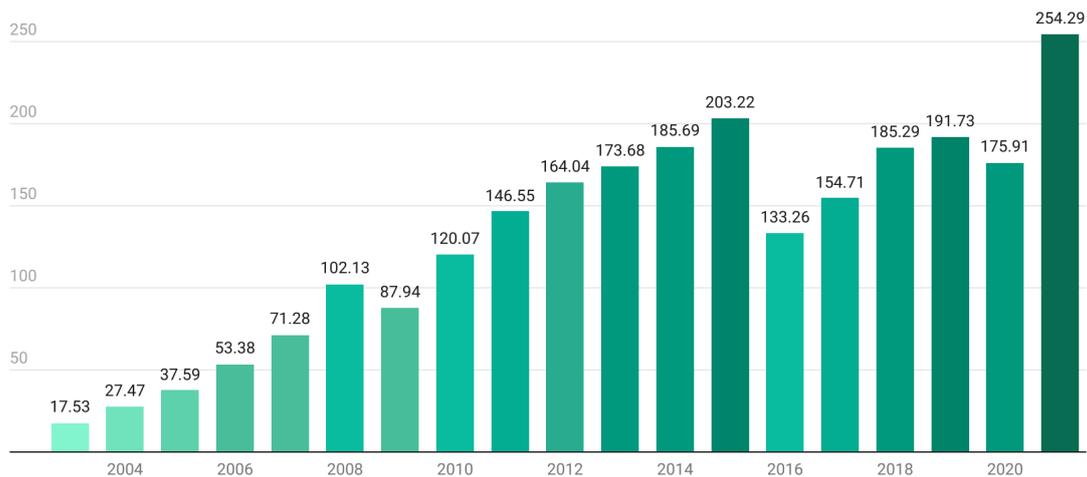


Chart: C.Heidbrink (2022) • Source: Johns Hopkins China-Africa Research Initiative. General Administration of Customs PRC • Created with Datawrapper

<sup>31</sup> Appiah-Nyamekye Sanny, Josephine and Selormey, Edem: Africans welcome China's influence but maintain democratic aspirations. (Afrobarometer Dispatch, No. 489, November 15, 2021), accessed on March 24, 2022, at [https://media.africaportal.org/documents/ad489-pap3-africans\\_welcome\\_chinas\\_influence\\_maintain\\_democratic\\_aspirations.pdf](https://media.africaportal.org/documents/ad489-pap3-africans_welcome_chinas_influence_maintain_democratic_aspirations.pdf).

<sup>32</sup> CMS Legal Services: Belt and Road Initiative. The view from Africa, 2021, accessed on March 22, 2022, at <https://cms.law/en/media/international/files/publications/publications/bri-view-from-africa?v=1>, p. 2.

<sup>33</sup> 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, at: <http://www.customs.gov.cn/customs/302249/zfxxgk/2799825/302274/302277/302276/4127455/index.html>.

compared to the previous year. Both countries did not join the BRI until 2021, making future developments for these two countries interesting research cases.<sup>34</sup>

## Top 10 African Countries With the Highest Bilateral Trade Volume in 2021

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	% of Chn-Afr 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%

Table: C.Heidbrink (2022) • Source: General Administration of Customs PRC • Created with Datawrapper

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, 58 per cent of trade consists of Chinese exports to Africa in 2021.<sup>35</sup> This again marks a rebalance in comparison to the previous year 2020, when Chinese exports amounted to 65 per cent of the trade volume. While imports and exports balanced each other throughout most of the 2000s, the share of Chinese exports to Africa has consistently outpaced its imports from the continent since 2012.

Since the figures have fluctuated widely over the course of the last two decades, no empirical evidence can be concluded for a 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, while it only increased again thereafter.<sup>36</sup> Thus, the overarching fear that the African markets will be swamped by cheap Chinese imports has so far not been proven.<sup>37</sup> Whilst China mostly imports raw materials, its export to Africa consists mainly of

### China-Africa Trade in 2021

in US\$ bn.

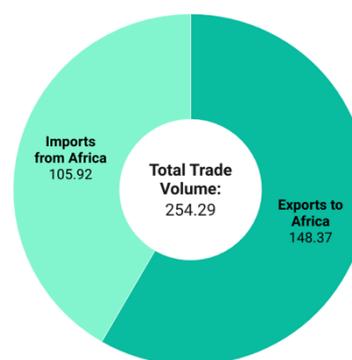


Chart: C.Heidbrink (2022) • Source: General Administration of Customs PRC • Created with Datawrapper

<sup>34</sup> 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 on April 13, 2022, at <http://www.customs.gov.cn/customs/302249/zfxgk/2799825/302274/302277/302276/4127455/index.html>.

<sup>35</sup> Ibid.

<sup>36</sup> Johns Hopkins University SAIS China-Africa Research Initiative: China's exports to African Countries. (China Africa Research Initiative, 2022), accessed on March 17, 2022, at <http://www.sais-cari.org/data-china-africa-trade>.

<sup>37</sup> Devonshire-Ellis, Chris: China's Belt And Road Initiative Member Countries: Exports Up 28% In Three Years. (Silk Road Briefing, November 11, 2020), accessed on March 17, 2022, at <https://www.silkroadbriefing.com/news/2020/11/10/chinas-belt-and-road-initiative-member-countries-exports-up-28-in-three-years/>.

value-added products. Nigeria, designated as a strategic partner of China, exports minerals, oils, plastics, rubber, animal products, ships and fruits. In contrast, Chinese imports to Nigeria consist mainly of machinery, mechanical products, I.T., digital technologies and cell phones.<sup>38</sup> 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.

### Share of Gross Annual Revenues Of Chinese Companies Construction Projects in 2020

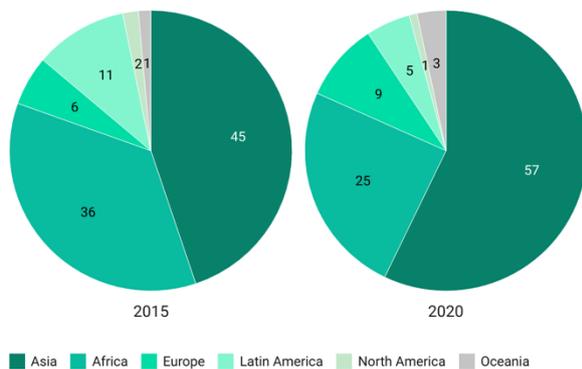


Chart: C.Heidbrink (2022) • Source: Johns Hopkins China-Africa Research Initiative • Created with Datawrapper

Gross annual revenues of Chinese companies' construction projects in the continent have declined since 2015, this may indicate that higher social standards and qualitative requirements of BRI 2.0 for project operators have diverted income more towards local partners and strongly 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 revenues of Chinese companies in engineering and construction projects.

In 2020, for example, the share was about 24.6 per cent, while the share for Asia was 57.2 per cent. Revenues from Europe (9.0 per cent) and the Americas (6 per cent) 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 per cent 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. The year 2020 was the fifth year in a row in which these revenues fell. Numbers in US\$ bn unadjusted.

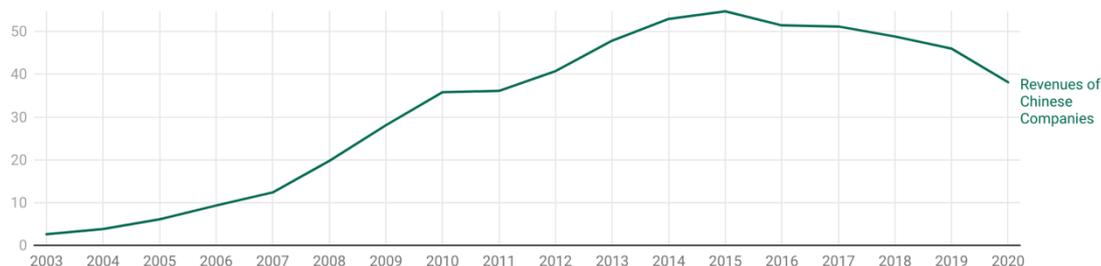


Chart: C.Heidbrink (2022) • Source: Johns Hopkins China-Africa Research Initiative • Created with Datawrapper

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, which are Nigeria, Kenya, Ethiopia, DRC, Zambia, Angola and Tanzania. 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 is even ranked

<sup>38</sup> Ibid.

33rd out of 54 African countries with \$43 million. Consequently, past investments did generate revenue for Chinese companies, which are entrusted with the implementation of BRI projects. However, 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. This business model seems to begin to diminish with the starting of the BRI in 2015.

## 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 Revenues of Chinese Companies'  
Construction Projects in 2020

Country	Revenues in US\$ mn unadjusted
 Algeria	4,688
 Nigeria	3,510
 Egypt	2,993
 Kenya	2,957
 Ethiopia	2,925
 DRC	2,025
 Zambia	2,022
 Guinea	1,778
 Angola	1,515
 Tanzania	1,456

Table: C.Heidbrink (2022) • Source: Johns Hopkins University • Created with Datawrapper

## 4. China: From the suspect of “Debt Trap” to the champion of “Debt Relief”

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 Johns Hopkins University School of Advanced International Studies reveals that Chinese financiers have signed 1,141 loan commitments worth \$153 billion with African governments and state-owned enterprises.<sup>39</sup> 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 feeling being unable to repay their loans.<sup>40</sup> These developments triggered the 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 by Kenya and a \$110 million debt relief by Zambia.<sup>41</sup>

Considering the actual situation of African countries, since 2000, China has made nine commitments to cancel the debts of borrowing countries. 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.

<sup>39</sup> China Africa Research Initiative: Loan Data, accessed on April 11, 2022, at <http://www.sais-cari.org/data>.

The *China Africa Research Initiative* at Johns Hopkins University finds that China has restructured or refinanced about \$15 billions of African debt between 2000 and 2019, without the “asset seizures” that countries like the US have criticized in accusations of “debt traps”. 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.<sup>42</sup>

#### Debt Restructuring cases show a wide range of treatments

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

Table: X. Ke (2022). Source: SAIS-CARI 2020.

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 expires at the end of December 2021.<sup>43</sup>

The DSSI countries have shown a diversity of creditors over the past decades. Overall, borrowing has been mainly from China, Paris Club official creditors as well as private banks and multilateral institutions.

#### Composition of external obligations for DSSI countries, 2006 and 2020

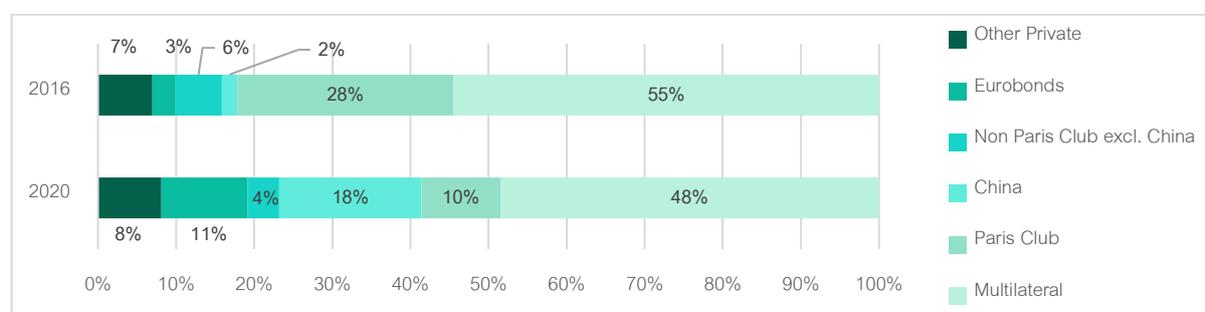


Figure: X. Ke (2022). Source: IMF 2022.

In 2020, the share of DSSI countries borrowing from China rises from 2 per cent to 18 per cent, the share sold to European private creditors increases from 3 per cent to 11 per cent, and the share of external debt owed to Paris Club creditors decreases from 28 per cent in 2006 to 10 per cent in 2020.<sup>44</sup>

It is worth noting that China, with 18 per cent of the total share of external debt, became the most significant debt relief country in this initiative. It suspended \$5.7 billion in debt payments, contributing to more than half of

<sup>42</sup> SAIS-CARI: Debt Relief with Chinese Characteristics, 2020, accessed on April 20, 2022, at <https://static1.squarespace.com/static/5652847de4b033f56d2bdc29/t/60353345259d4448e01a37d8/1614099270470/WP+39+-+Acker%2C+Brautigam%2C+Huang+-+Debt+Relief.pdf>.

<sup>43</sup> World Bank: Debt Service Suspension Initiative, 2022, accessed on April 21, 2022, at <https://www.worldbank.org/en/topic/debt/brief/covid-19-debt-service-suspension-initiative>.

<sup>44</sup> IMF: Restructuring Debt of Poorer Nations Requires More Efficient Coordination, 2022, accessed on April 21, 2022, at <https://blogs.imf.org/2022/04/07/restructuring-debt-of-poorer-nations-requires-more-efficient-coordination/#>.

the total global debt moratorium. Through this action, 45 per cent of debts owned by the poorest countries to China was suspended. In contrast, as the following figures show, the United Kingdom (UK) had no suspension of payments on its commercial loans and still recovered \$3.2 billion in debt from countries that applied for the debt standstill initiative.<sup>45</sup>

**Most important creditors suspending payments in DSSI**

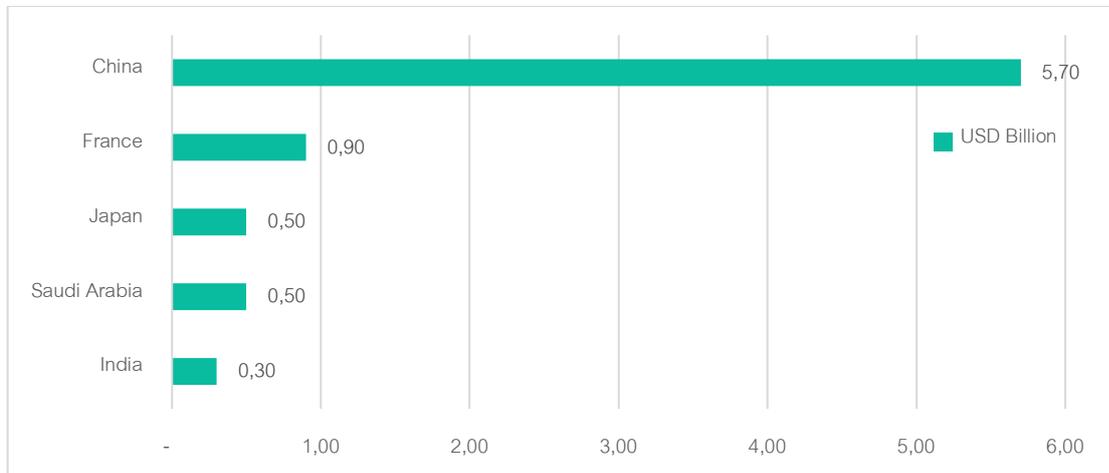


Figure: X. Ke (2022). Source: JUBLIEE DEBT CAMPAIGN 2021.

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

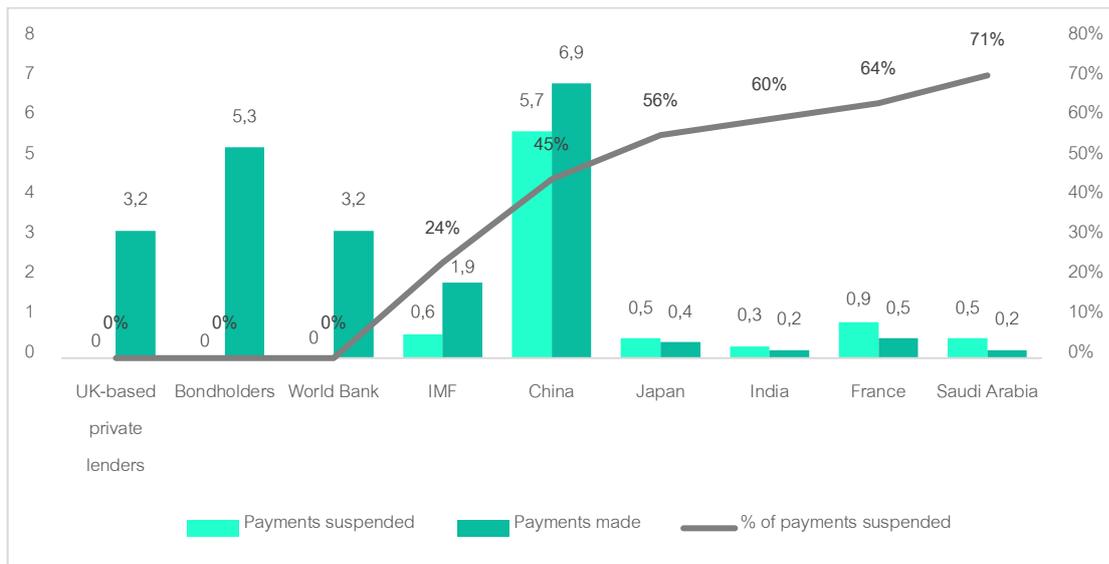


Figure: X. Ke (2022). Source: JUBLIEE DEBT CAMPAIGN 2021.

## 5. COVID-19-Pandemic and the Expansion of “Health Silk Road” to Africa

Indeed, our current research findings may already partly confirm the assumption that the rapid increase of China-Africa trade in 2021 stays in a close connection with the outbreak of the pandemic intensifying the advance of the Health Silk Road, an integrated component of the BRI 2.0, to Africa. Investigated figures reveal that the COVID-19-pandemic has caused strong demands from African countries for Chinese medical and pharmaceutical products which in turn has driven the bilateral trade to a record high.

<sup>45</sup> JUBLIEE DEBT CAMPAIGN: How the G20 debt suspension initiative benefits private lenders, 2021, accessed on April 21, 2022, at [https://jubileedebt.org.uk/wp-content/uploads/2021/10/How-the-G20-debt-suspension-initiative-benefits-private-lenders\\_10.21.pdf](https://jubileedebt.org.uk/wp-content/uploads/2021/10/How-the-G20-debt-suspension-initiative-benefits-private-lenders_10.21.pdf).

Prior to the COVID-19 outbreak, the China-Africa pharmaceutical trade did not show a significant trend of increase or decrease. From 2010 to 2019, the year before the outbreak, the figure follows a steady and slowly increasing trend. When combined with the growth rate, it is a curve that fluctuates up and down.<sup>46</sup>

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 for Africa, African countries will see an increase of \$10.6 billion in medical spending due to the need to combat the COVID-19-pandemic.

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, involving personal protection, diagnostic reagents and other products.<sup>47</sup> In this international environment, medical cooperation and pharmaceutical trade in the BRI 2.0 period have proliferated significantly in the short term.<sup>48</sup> This is shown in the figure below. However, it remains unclear whether this trend will continue in the long term.

China-Africa pharmaceutical trade volume, 2010-2019



Figure: X. Ke (2022). Source: Zhang 2020.

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

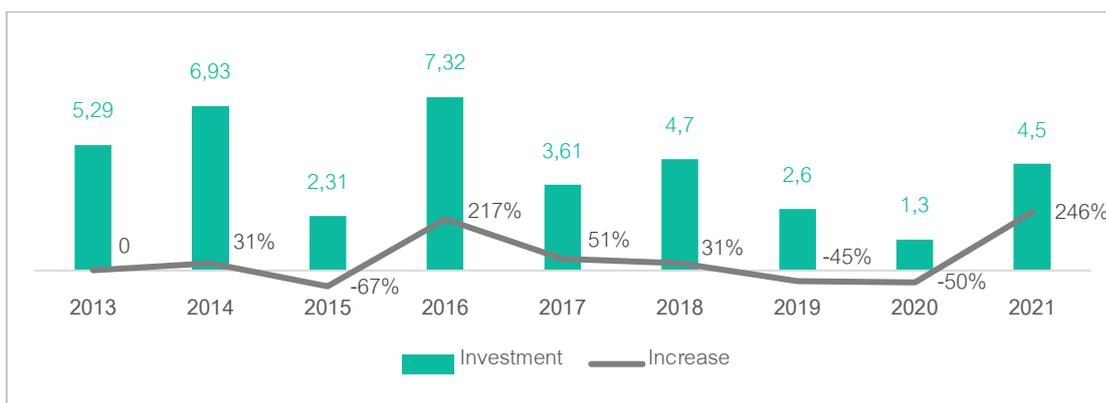


Figure: X. Ke (2022). Source: GREEN FINANCE & DEVELOPMENT CENTER 2022.

<sup>46</sup> 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 on April 8, 2022, at [http://www.yyjib.com.cn/yyjib/202012/202012071633583358\\_9276.shtml](http://www.yyjib.com.cn/yyjib/202012/202012071633583358_9276.shtml).

<sup>47</sup> Ibid.

<sup>48</sup> GREEN FINANCE & DEVELOPMENT CENTER: Brief: China Belt and Road Initiative (BRI) Investment Report 2021, 2022, accessed on April 6, 2022, at <https://greenfdc.org/brief-china-belt-and-road-initiative-bri-investment-report-2021/>.

### Top 10 of Export Volume of Masks, 2020

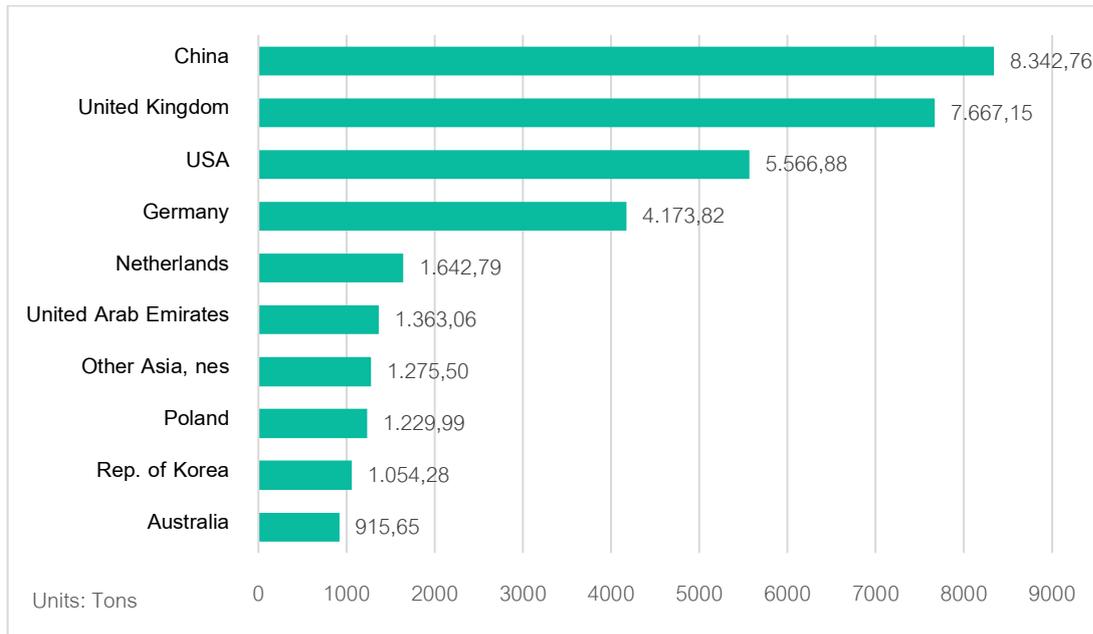


Figure: X. Ke (2022). Source: UN Comtrade 2020.

### Top 10 of Export Volume of Therapeutic Respiration Apparatus, 2020

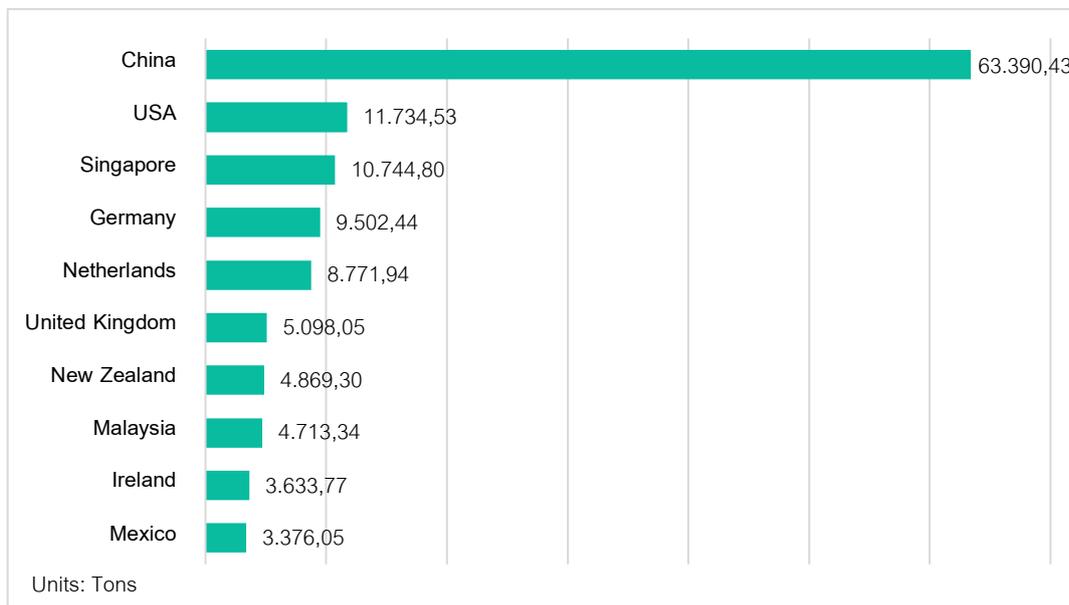


Figure: X. Ke (2022). Source: UN Comtrade 2020.

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/containment can have a significant impact on the effectiveness of the world's fight against the COVID-19 pandemic, especially in Africa, which lacks medical resources. The three figures below show China's

exports of medical and pandemic prevention/containment supplies worldwide in 2020 and 2021 since the COVID-19 outbreak. It is seen that China is the largest exporter of masks, respirators and vaccines.<sup>49, 50</sup>

Even unspoken, there has been an overt and covert competition between China, the US and the EU for influence on Africa's fighting against the COVID-19 pandemic since 2020. Up to the beginning of 2022, more than 180 million doses of COVID-19 vaccine have been delivered by China to 53 African countries and the AU Commission.<sup>51</sup> In December 2021, Xi pledged to Africa to provide an additional 1 billion doses of vaccine against Covid in the form of donations or support for local production.<sup>52</sup>

Somehow belated, but quite energetically, the US has launched its gigantic campaign to support the continent to stop the spreading of coronavirus. Currently (but not before May 2021), the country has delivered 243 million doses of vaccines to Africa and committed to donate at least 1.1 billion doses of COVID-19 vaccine for global use by 2023.<sup>53</sup> In contrast, the EU provided €100 million in humanitarian support for COVID-19 vaccination in Africa directly. It also shares 145 million doses of vaccine with Africa and contributes €425 million (\$469 million) to the COVAX facility.<sup>54</sup>

Number of Domestic Use and Export of COVID-19 Vaccine in Relevant Countries, as of May 2021

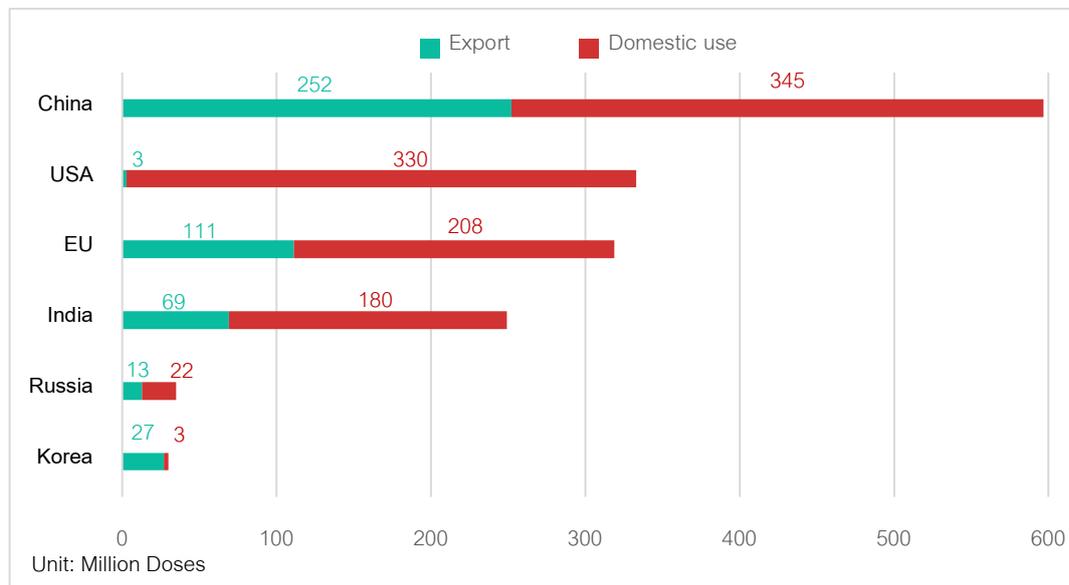


Figure: X. Ke (2022). Source: the Institute of Boao Forum for Asia 2021.

<sup>49</sup> UN: UN Comtrade Database. Export data at country level, 2022, accessed on April 9, 2022, at <https://comtrade.un.org/data>.

<sup>50</sup> The Institute of Boao Forum for Asia, Renmin University of China: Launch of Report on the Global Use of COVID-19 Vaccines, 2021, accessed on April 9, 2022, at <http://www.199it.com/archives/1290645.html>.

<sup>51</sup> Zhang, Hong: Chinese vaccines, bringing hope to Africa (中国疫苗，给非洲带来希望), accessed on March 31, 2022, at <http://health.people.com.cn/n1/2022/0106/c14739-32325083.html>

<sup>52</sup> Rédaction: China promises to help Africa fight Covid 19. (Africanews, December 6, 2021), accessed on March 31, 2022, at <https://www.africanews.com/2021/12/01/china-promises-to-help-africa-fight-covid-19/>.

<sup>53</sup> KFF: U.S. International COVID-19 Vaccine Donations Tracker – Updated as of March 30, 2022, accessed on March 31, 2022, at <https://www.kff.org/coronavirus-covid-19/issue-brief/u-s-international-covid-19-vaccine-donations-tracker/>.

<sup>54</sup> EU: Support package for the COVID-19 vaccination rollout in Africa, accessed on March 31, 2022, at [https://ec.europa.eu/echo/where/africa/support-package-covid-19-vaccination-rollout-africa\\_en](https://ec.europa.eu/echo/where/africa/support-package-covid-19-vaccination-rollout-africa_en).

### COVID-19 Vaccine Assistance to Africa

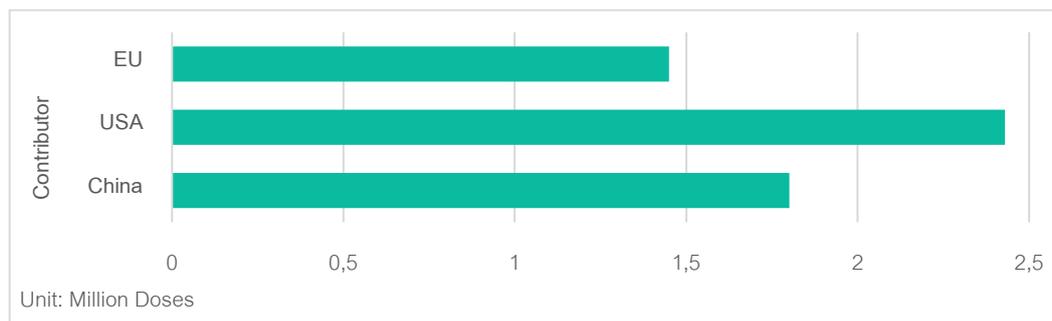


Figure: X. Ke (2022). Source: EU 2022.

Firm competition among the top-three assistance providers has also emerged in the domain of anti-pandemic materials. For African countries, China has provided more than 120 batches of testing reagents, respirators, and other anti-pandemic materials promptly. Its vaccine assistance has reached 50 African countries and the AU. Additionally, the country has sent anti-pandemic medical experts to 17 African countries supporting local medics to do their job more effectively based on Chinese experiences.<sup>55</sup>

Even stressed by daunting domestic situations, the US has 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 totaled more than \$20 million in US government assistance.<sup>56</sup>

The EU's assistance has been focused on East Africa. €261 million (\$288 million) from development funding is being redirected to support the immediate health care response, and €475 million (\$524 million) will help mitigate the economic and social consequences of COVID-19. More than €11 million worth of humanitarian funding has also been allocated to the region to support coronavirus control and prevention, and to help vulnerable populations gain access to health care, water and sanitation.<sup>57</sup>

However, China seems to have done more than its competitors regarding investments in Africa's healthcare. Along with the COVID-19 outbreak, the coverage of Chinese healthcare investments in Africa has grown significantly from Q3 2019 to Q3 2020. A similar advance by the US and the EU is absent insofar as available research materials show. The chart below shows the number of countries and regions that received Chinese equity investments and joint ventures in healthcare-related overseas investments.<sup>58</sup> Thereby, Chinese equity investors have shown strong interest in countries in South-East Africa: From Ethiopia and Uganda to Zimbabwe and Botswana.

<sup>55</sup> 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 on March 31, 2022, at [http://stdaily.com/index/kejixinwen/2021-10/26/content\\_1228365.shtml](http://stdaily.com/index/kejixinwen/2021-10/26/content_1228365.shtml).

<sup>56</sup> USAID: THE U.S. GOVERNMENT'S COVID-19 RESPONSE IN SUB-SAHARAN AFRICA, 2020, accessed on March 31, 2022, at <https://www.usaid.gov/africa/documents/us-governments-covid-19-response-sub-saharan-africa>.

<sup>57</sup> EU: EU COVID-19 response for East Africa: first shipment of medical supplies arrives in Ethiopia, 2020, accessed on March 31, 2022, at [https://ec.europa.eu/international-partnerships/news/eu-covid-19-response-east-africa-first-shipment-medical-supplies-arrives-ethiopia\\_en](https://ec.europa.eu/international-partnerships/news/eu-covid-19-response-east-africa-first-shipment-medical-supplies-arrives-ethiopia_en).

<sup>58</sup> SIIS: Health Silk Road 2020: A Bridge to the Future of Health for All, 2021, accessed on April 7, 2022, at <https://research.hktcdc.com/en/article/NzU0NzY0NDA4>.

Chinese Outbound Healthcare Investments/Partners in/near Africa in 2019 Q3



Chinese Outbound Healthcare Investments/Partners in Africa in 2020 Q3



Map: X. Ke (2022). Source: SIIS 2021

One of the crucial characteristics making China’s assistance to Africa distinct from that of the US and the EU is what the German think tank SWP calls “combined assistance”. In the framework of the BRI, China has provided all African countries with a combination of different medical supplies (masks, kits, respirators) and various forms of assistance (medical teams, financial assistance) to fight against COVID-19.<sup>59</sup>

African Countries Receiving Chinese Aid-Material Combinations; BRI Cooperation Agreements in 2021

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

Table: X. Ke (2022). Source: SWP 2021.

Beyond that, 31 African countries have received, with some of them still receiving, other aid outside of the “combined assistance”. Most of these aids are provided based on specific demands of the recipients, mostly in form of medical expert teams and/or financial assistance.

<sup>59</sup> SWP Comment: China’s Health Diplomacy during Covid-19, 2021, accessed on April 7, 2022, at [https://www.swp-berlin.org/publications/products/comments/2021C09\\_ChinaHealthDiplomacy.pdf](https://www.swp-berlin.org/publications/products/comments/2021C09_ChinaHealthDiplomacy.pdf).

#### African Countries Receiving Other Chinese Aid in 2021

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

Table: X. Ke (2022). Source: SWP 2021.

En passant, several countries have received medical assistance surpassing the supporting activities included in “combined services”, medical expert teams or financial aid. Most of them have been traditional partners of China’s medical research institutions and hospitals from different provinces for decades.

#### African Countries Receiving Other Chinese Medical Aid in 2021

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

Table: X. Ke (2022). Source: SIIS 2021.

## 6. China’s Engagement in Africa’s Security and Mining Industry

China’s security engagement in Africa is mostly known for its activities in Djibouti. In 2017, China established its first, and so far its only overseas military base in the eastern African country of Djibouti. For the Wall Street Journal, by introducing this project, China is going to establish a permanent military installation in the Central African country of Equatorial Guinea.<sup>60</sup> However, Chinese military experts immediately refuted this claim and pointed out that “the US disclose information on China building an overseas military base” in order to hype the “China threat”.<sup>61</sup>

In fact, the military base is not the only sign of increasing Chinese security and military engagement in Africa. For China, UN peacekeeping operations serve, indeed, as the most important tool to expand Chinese military cooperation with African countries. However, it was not until the 1990s (the country’s first engagement with UN peacekeeping operations was its participation in the UN mission in Cambodia starting in 1990/91), that 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 an embittered 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

<sup>60</sup> 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 on April 5, 2022, at <https://www.wsj.com/articles/china-seeks-first-military-base-on-africas-atlantic-coast-u-s-intelligence-finds-11638726327>.

<sup>61</sup> 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 on April 5, 2022, at <https://www.globaltimes.cn/page/202112/1240819.shtml>.

(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, 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.<sup>62</sup> As the figure "Peacekeeping Contributions UNSC P5" presented by Tom Bayes shows, "China's deployed peacekeepers [for the UN] have increased from 52 in 2000 to 2437 in July 2019."<sup>63</sup> Of the Five Permanent Members of the UN Security Council, China has become the biggest contributor to military observers, verifiers, inspectors, police operations as well as peacekeeping troops by order of the UN.

"Importantly", as Bayes reports, "its personnel contributions are diverse: medical, engineering, police, and combat units, as well as helicopter unit".<sup>64</sup> As to financial support for the UNPKOs, China ranks second only to the US "contributing 15.21 per cent of the total (compared to the US's 27.89 per cent and an aggregated 23.85 per cent for the EU's members)".<sup>65</sup>

## Peacekeeping Contributions of UNSC P5

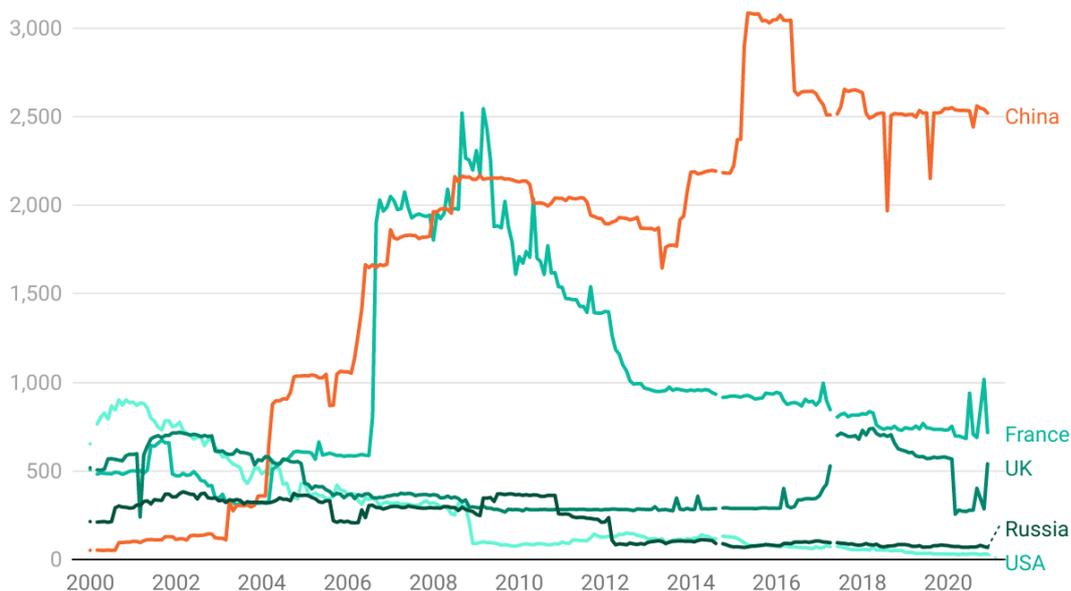


Chart: (2022) • Source: United Nations Peacekeeping • Created with Datawrapper

In addition, as Beijing promotes its BRI in Africa strongly, China's proactive engagement with UN peacekeeping operations opens the country new avenues to facilitate its security cooperation with the participating African countries.<sup>66</sup> 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 of BRI to the UN and regional organizations.

<sup>62</sup> 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 on April 10, 2022, at <https://mwi.usma.edu/beijings-blue-helmets-what-to-make-of-chinas-role-in-un-peacekeeping-in-africa/>.

<sup>63</sup> Bayes, Tom: China's growing security role in Africa: Views from West Africa, Implications for Europe. (Konrad-Adenauer-Stiftung e. V., 2020), accessed on April 2, 2022, at <https://www.kas.de/documents/252038/7995358/China%E2%80%99s+growing+security+role+in+Africa.pdf/e0df44a4-bd9f-c794-6201-311e78add50?version=1.0&t=1594801201898>, pp. 45-46.

<sup>64</sup> Ibid. p. 46.

<sup>65</sup> Ibid. p. 46.

<sup>66</sup> Herbert, Natalie: China's Belt and Road Initiative invests in African infrastructure — and African military and police forces. (The Washington Post, April 30, 2021), accessed on April 8, 2022, at <https://www.washingtonpost.com/politics/2021/04/30/chinas-belt-road-initiative-invests-african-infrastructure-african-military-police-forces/>.

In 2021, Chinese 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.<sup>67</sup> Beijing is wielding its influence in the UN to safeguard its investments in Africa BRI projects. Thus, active participation in multilateral peacekeeping operations in Africa is generating profound windfalls for BRI projects. Conversely, BRI serves as a new approach to increase Chinese involvement in African security.<sup>68</sup> Unlike France and the US which place a heavy overt troop presence in Africa, China tends to integrate military cooperation into its economic relations with African countries.<sup>69</sup>

It has been widely purported that China’s investment in Africa is much “dirtier” than that of the Western countries because the “World’s Factory”, driven by its hunger for raw materials and minerals, had disproportional interests to invest in mining and other attractive industries. China, due to being “unable to meet its annual demand for copper, zinc, nickel and a range of other raw materials”, the Institute of Developing Economies of Japan asserted, “is now the prime driver of world mineral prices and a number of Africa countries have become key beneficiaries of this process”.<sup>70</sup>

A differentiated inquest into the subject shows, however, that China is not alone in investing in mining in Africa. To a certain degree, the intensity of engagement with African mining industries by Western countries looks often much stronger than that of China. This is at least true in the case of the US. A systematic comparison of the composition of Chinese and American investment in Africa during the recent years reveals an over-proportional weight of the mining industry in the US investment portfolio for which even the massive investment of Chinese companies in African mining areas appears moderate.

Composition of China's foreign direct investment in Africa by industry, 2013 v. 2020

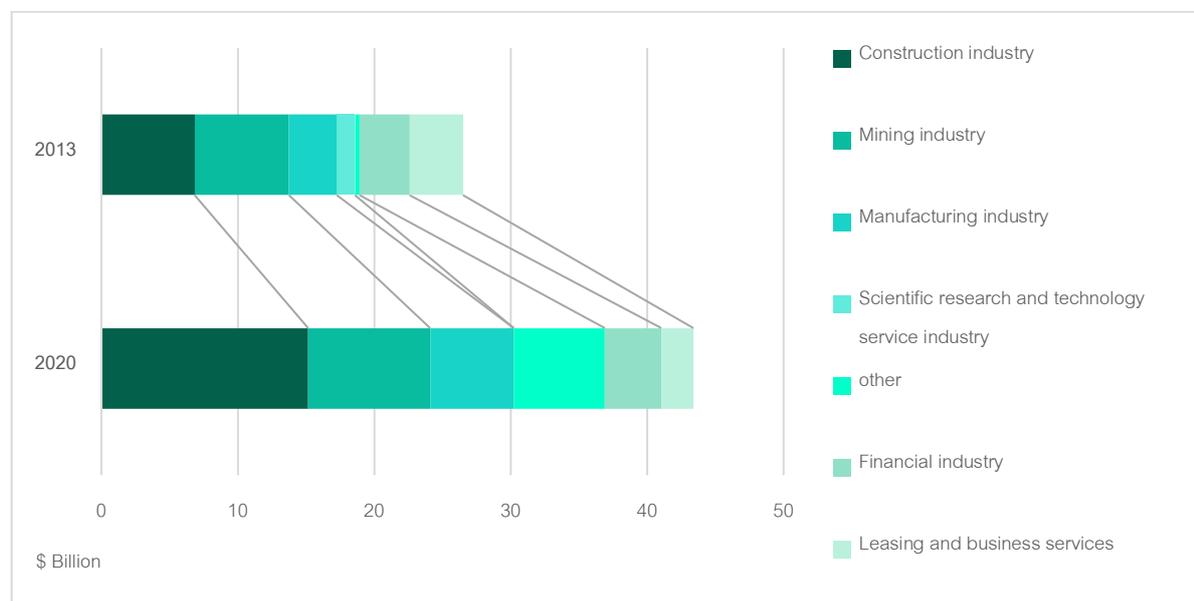


Figure: X. Ke (2022). Source: the Ministry of Commerce of the PRC 2014, 2021.

<sup>67</sup> Zhang, Rachel: China urges UN to support African peacekeeping efforts. (South China Morning Post, April 20, 2021), accessed on April 8, 2022, at <https://www.scmp.com/news/china/diplomacy/article/3130300/china-urges-un-support-african-peacekeeping-efforts>.

<sup>68</sup> 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, 2021, accessed on April 6, 2022, at [http://focac.org.cn/focacdakar/eng/zxyw\\_1/202112/t20211206\\_10462843.htm](http://focac.org.cn/focacdakar/eng/zxyw_1/202112/t20211206_10462843.htm).

<sup>69</sup> 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 on April 6, 2022, at <https://ecfr.eu/article/chinas-new-military-base-in-africa-what-it-means-for-europe-and-america/>.

<sup>70</sup> Institute of Developing Economies (IDE): China in Africa: Capital 8 “China’s Mining Footprint in Africa”, accessed on April 12, 2022, at [https://www.ide.go.jp/English/Data/Africa\\_file/Manualreport/cia\\_08.html](https://www.ide.go.jp/English/Data/Africa_file/Manualreport/cia_08.html).

After the Belt and Road Initiative (BRI) was launched, China's investment in Africa grew from \$26.19 billion to \$43.4 billion between 2013 and 2020, mainly in construction, mining industry, manufacturing and finance.<sup>71,72</sup> The BRI has had a significant impact on the promotion of Chinese investment in various industries in Africa. The three sectors of construction, mineral industry and manufacturing maintained the top three shares of Chinese investment in Africa during this seven-year period.

Composition of China's foreign direct investment in Africa by industry 2013

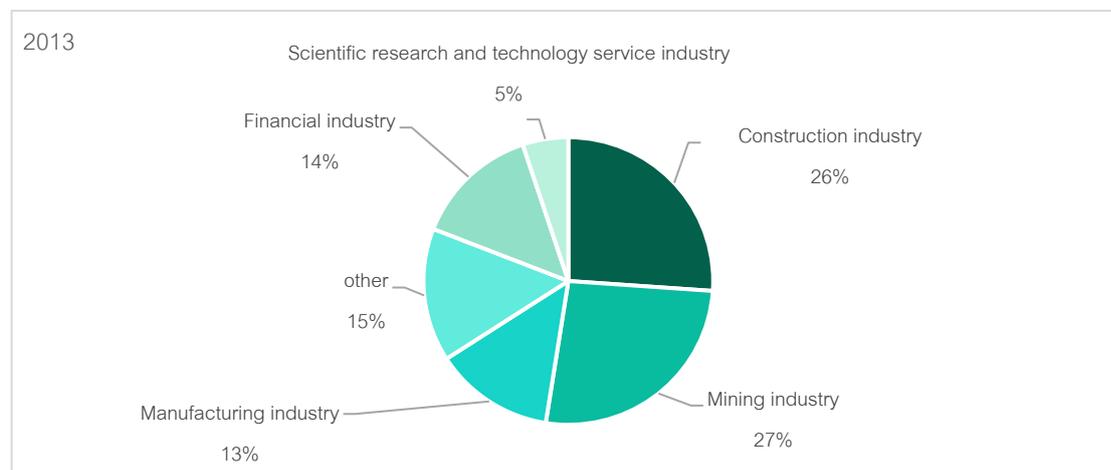


Figure: X. Ke (2022). Source: the Ministry of Commerce of the PRC 2014.

Composition of China's foreign direct investment in Africa by industry 2020

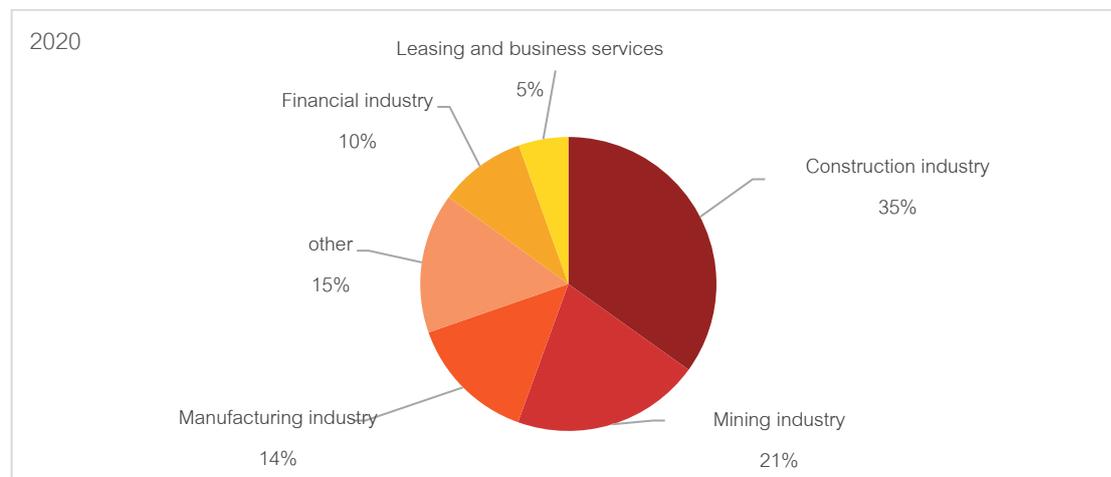


Figure: X. Ke (2022). Source: the Ministry of Commerce of the PRC 2021.

During the same period, US investment in Africa declines from \$60.42 billion in 2013 to \$47.5 billion in 2020. The significant decline in total investment over this seven-year period is accompanied by a decline in investment in the mining sector from 60 per cent to 41 per cent. However, US investment in Africa's mining sector remains the most dominant category of US investment in Africa in 2020, accounting for 41 per cent of total investment, twice as large as China's level of 21 per cent over the same period.<sup>73,74</sup> As shown in the below figures:

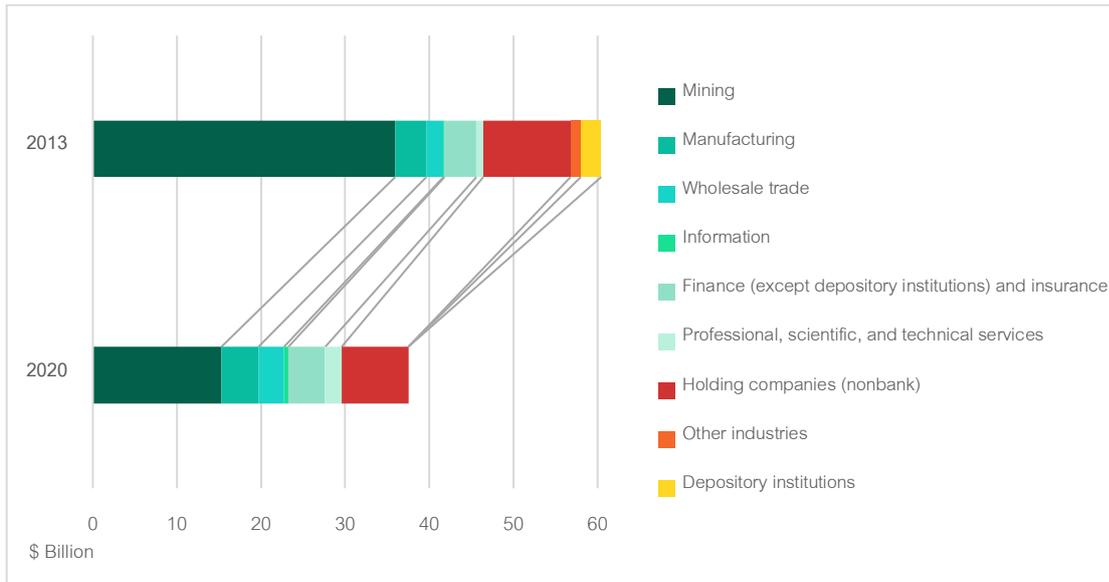
<sup>71</sup> Ministry of Commerce of the People's Republic of China: Report on Development of China's Outward Investment and Economic Cooperation, 2021, accessed on April 8, 2022, at <http://www.gov.cn/xinwen/2021-09/29/5639984/files/a3015be4dc1f45458513ab39691d37dd.pdf>.

<sup>72</sup> Ministry of Commerce of the People's Republic of China: Report on Development of China's Outward Investment and Economic Cooperation, 2014, accessed on April 8, 2022, at <http://fec.mofcom.gov.cn/article/tzhzcj/tzhz/upload/duiwaitouzihezuofazhanbaogao2014.pdf>.

<sup>73</sup> BEA: Direct Investment by Country and Industry, 2020,2021, accessed on April 8, 2022, at <https://www.bea.gov/sites/default/files/2021-07/dici0721.pdf>.

<sup>74</sup> BEA: Direct Investment Positions for 2013 - Country and Industry Detail, 2014, accessed on April 8, 2022, at [https://apps.bea.gov/scb/pdf/2014/07%20July/0714\\_direct\\_investment\\_positions.pdf](https://apps.bea.gov/scb/pdf/2014/07%20July/0714_direct_investment_positions.pdf).

Composition of US' foreign direct investment in Africa by industry, 2013 v. 2020



Composition of US' foreign direct investment in Africa by industry, 2013 vs. 2020



Figure: X. Ke (2022). Source: Bureau of Economic Analysis [Bea] of the USA.

## 7. Beijing's "Green Deal" with Africa

In her speech for the 2019 Belt and Road Forum, 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"<sup>75</sup>. 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"), and the sharing of "carbon neutrality" experience and results will become an important part of the construction of the Green Silk Road.<sup>76</sup>

Energy loans to Africa from the Export-Import Bank of China and China Development Bank were the main financing institutions for the country's overseas investments, mainly for hydropower, oil and coal, according to Boston University. As shown in the figure below, 2020 saw a plunge in investments in unsustainable energy sources such as oil and coal.<sup>77</sup> As shown in the below figure.

China's Energy Finance in Africa, 2016-2020

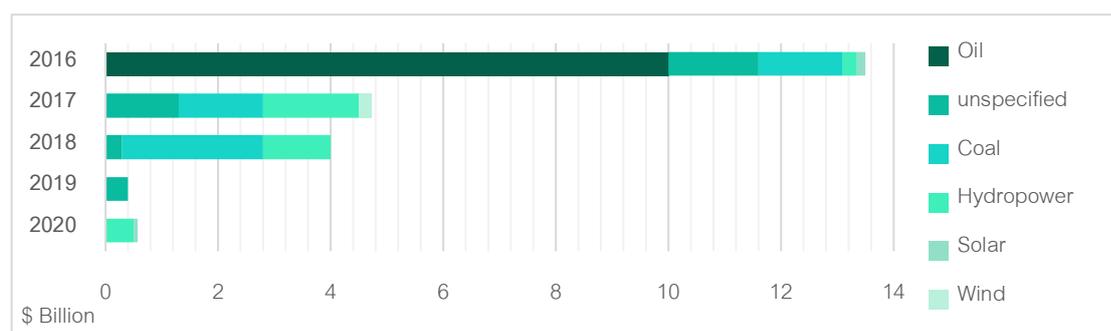


Figure: X. Ke (2022). Source: The Boston University Global Development Policy Center 2022.

While China was still funding fossil fuel projects and hydropower (the latter is low-carbon compared to natural gas or coal-fired generation, 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.<sup>78</sup>

In 2021, with the announcement by Xi Jinping at the UN General Assembly in November of that year to end financing for coal-fired power plants overseas, no coal projects have been financed or invested in to date, and green energy financing has increased marginally to a new high of \$6.3 billion (\$6.2 billion in 2020) in Belt and

<sup>75</sup> Lagarde, Christine: BRI 2.0: Stronger Frameworks in the New Phase of Belt and Road, accessed on April 6, 2022, at <https://www.imf.org/en/News/Articles/2019/04/25/sp042619-stronger-frameworks-in-the-new-phase-of-belt-and-road>.

<sup>76</sup> 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 on April 6, 2022, at <https://www.163.com/dy/article/G61LPVC50519C6BH.html>.

<sup>77</sup> 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 on April 6, 2022, at <https://www.bu.edu/cgef/?lang=en#/2017/Country-EnergySource>.

<sup>78</sup> Pike, Lili: Are China's energy investments in Africa green enough?. (China Dialogue, September 3, 2018), accessed on April 6, 2022, at <https://chinadialogue.net/en/energy/10799-are-china-s-energy-investments-in-africa-green-enough/>.

Road investments. A major change in the pattern of Chinese energy investment emerges in the Belt and Road from 2020 onwards, with a significant increase in the share of solar/wind investments.<sup>79</sup>

At the November 2021 ministerial meeting of the Forum on China-Africa Cooperation, China sharply reduced its investment in energy-intensive infrastructure in Africa over the next three years. It also cut aid in capacity building by 90 per cent. 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; 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 period.<sup>80</sup>

There is a major shift in China’s thinking on 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.<sup>81</sup> As shown in the following Figure.

Chinese energy engagement in the Belt and Road Initiative (BRI) 2013-2021 by subsector



Figure: X. Ke (2022). Source: GREEN FINANCE & DEVELOPMENT CENTER 2022.

## 8. China as a New Tech Player in Africa

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 government.<sup>82</sup> 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...

<sup>79</sup> GREEN FINANCE & DEVELOPMENT CENTER, *ibid.*

<sup>80</sup> Feffer, John: China’s Evolving Energy Policies in Africa, 2022, accessed on April 6, 2022, at <https://ips-dc.org/chinas-evolving-energy-policies-in-africa/>.

<sup>81</sup> GREEN FINANCE & DEVELOPMENT CENTER, *ibid.*

<sup>82</sup> Anderson, Ross: The Panopticon Is Already Here. (The Atlantic, September 2000 Issue), accessed on April 5, 2022, at <https://www.theatlantic.com/magazine/archive/2020/09/china-ai-surveillance/614197/>.

In Africa, this device is not only a medium of communication. It is also a medium of self-stylization and self-singularization.”<sup>83</sup>

While “shanzhai” (imitation) products no longer sell easily on the Chinese market, companies such as Oppo found a growing number of untapped markets in Africa.<sup>84</sup> Key companies, such as Transsion, a company that produces affordable mobile phones in Shenzhen, are often largely unknown both in China and the West. Transsion has a market share of almost 47 per cent 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.”<sup>85</sup> As the table demonstrates, Chinese companies dominate the African market with more than 64 per cent of the shipped units. The South Korean company Samsung, on the other hand, had a market share of only 19 per cent in the second quarter of 2021.

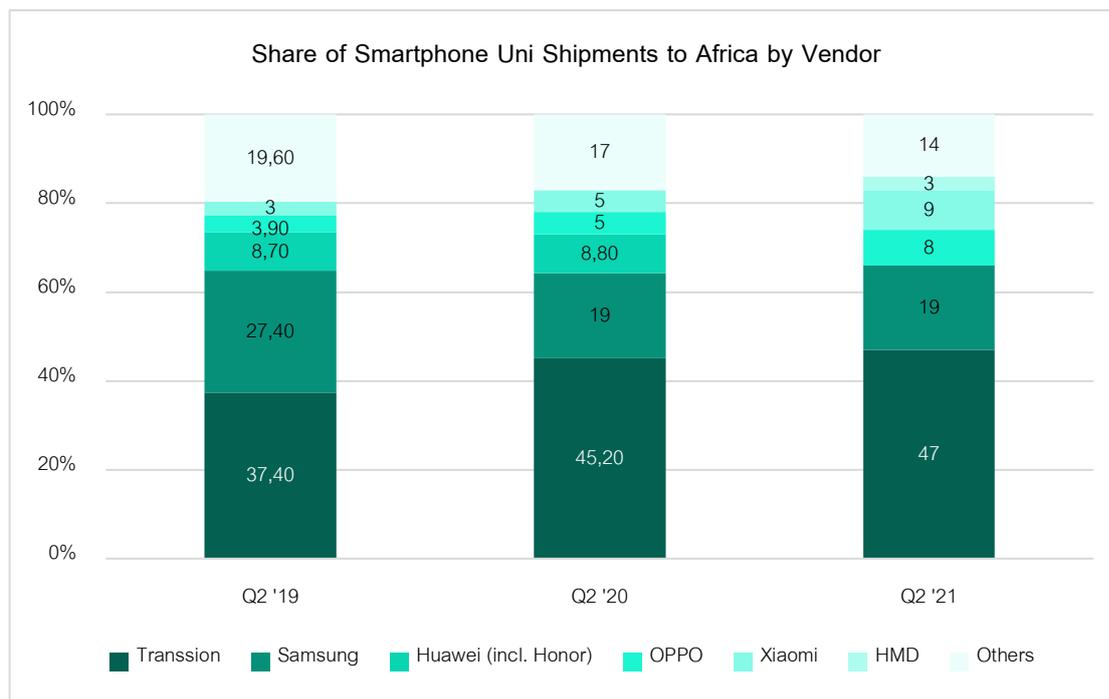


Chart: M. Mayer (2022). Source: Statista / IDC.

The sum of investments of Chinese large high-technology companies in Africa are amounting to 12 per cent of their overall projects and investments abroad according to the data set from ASPI (see table 2). Given the relatively small share of Africa in Chinese foreign trade,<sup>86</sup> 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.<sup>87</sup>

<sup>83</sup> Mbembe, Achille: *Out of the dark night*, Columbia University Press 2021, p. 216.

<sup>84</sup> Williams, Alexandria: *China is making more of Africa’s phones than you think*. (Quartz Africa, December 12, 2019), accessed on April 5, 2022, at <https://qz.com/africa/1764356/china-makes-majority-of-africas-smartphones/>.

<sup>85</sup> Mbembe, *ibid.*, p. 6.

<sup>86</sup> *China’s leading export partners in 2021, based on export value*. (Statista, February 2022), accessed on April 5, 2022, at <https://www.statista.com/statistics/256350/main-export-partners-for-china-by-export-value/>.

<sup>87</sup> Fasil, Mahlet: *Alibaba Group to help Ethiopia set up first eWTP hub, the second in Africa*. (Addis Standard, November 25, 2019), accessed on April 5, 2022, at <https://addisstandard.com/news-alibaba-group-to-help-ethiopia-set-up-first-ewtp-hubthe-second-in-africa/>.

Currently, the digital trade mainly serves to facilitate the export of agricultural products such as coffee.<sup>88</sup> The Ethiopia Hub, which is linked to Alibaba's Tmall Global, promoted the Ethiopian Coffee Brands Launch with 11,200 bags of Ethiopian coffee sold in one second. The UN is also partnering with these initiatives. UN Under-Secretary-General and Executive of the ECA, Secretary 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”<sup>89</sup>. According to H. E. 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.”<sup>90</sup>

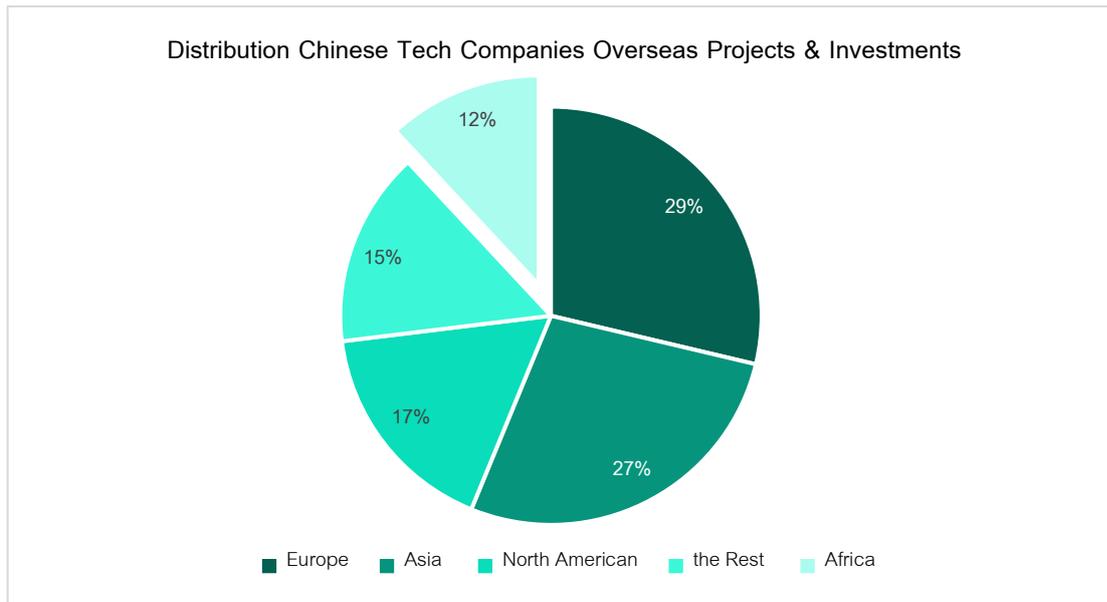


Chart: M. Mayer (2022). Source: Australian Strategic Policy Institute.

The graph below shows that Huawei conducts by far the largest share of projects and investments in Africa (44 per cent), followed by ZTE (18 per cent), Uniview (9 per cent) and China telecom. This mix indicates that Chinese companies are absolutely critical providers of telecommunication infrastructures in Africa. In fact, without Chinese tech companies, cellular communications in Africa would not be at the same level as they are 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.”<sup>91</sup>

China's Digital Silk Road addresses a need of African countries: to invest in and construct massive digital and data infrastructures,<sup>92</sup> required to run Africa's megacities and emerging economic corridors. China plans to

<sup>88</sup> Mureithi, Carlos: African diplomats are live-streaming and making deliveries to China's consumers. (Quartz Africa, January 27, 2022), accessed on April 5, 2022, at <https://qz.com/africa/2117788/african-nations-bet-big-on-chinas-e-commerce-market/>.

<sup>89</sup> 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), accessed on April 5, 2022, at <https://allafrica.com/stories/202201240560.html>.

<sup>90</sup> Ibid.

<sup>91</sup> Wright, Bianca: Made in China: Africa's ICT infrastructure backbone. (Chief Information Officer, March 22, 2020), accessed on April 5, 2022, at <https://www.cio.com/article/193170/made-in-china-africas-ict-infrastructure-backbone.html>.

<sup>92</sup> Chimbelu, Chiponda: Investing in Africa's tech infrastructure. Has China won already?. (Deutsche Welle, May 3, 2019), accessed on April 5, 2022, at <https://www.dw.com/en/investing-in-africas-tech-infrastructure-has-china-won-already/a-48540426>.

invest further \$ 8.43 billion in Africa to promote the Digital Silk Road.<sup>93</sup> Infrastructure, scientific cooperation and the digital economic feature prominently adopted in the “Forum on China-Africa Cooperation Dakar Action Plan (2022-2024)” on 30th November 2021, at the 8th Ministerial Conference of the Forum on China-Africa Cooperation (FOCAC) in Dakar, Senegal.<sup>94</sup> African countries, thus, are highly unlikely to join the US-led “Clean Network Initiative” which aims at curbing the influence of Huawei and ZTE.

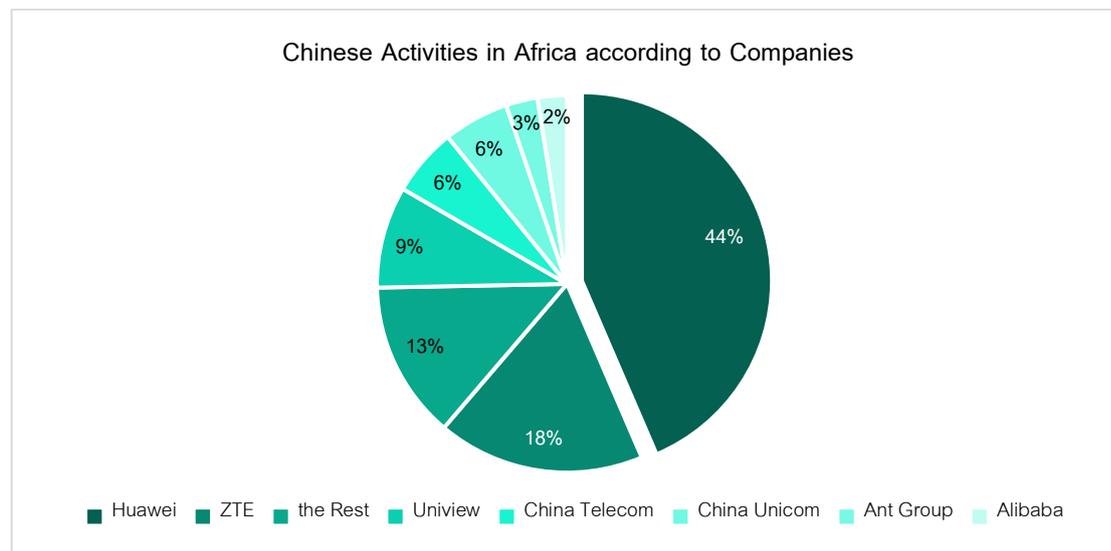


Chart: M. Mayer (2022). Source: Australian Strategic Policy Institute.

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 “*Chinese tech firms’ activities in Africa*” below shows that surveillance and “smart city” projects account for almost 50 per cent of activities. Yet, there are also e-payment ecosystems, biotechnology, cloud technology, artificial technology projects and increasing investments in fintech startups.<sup>95</sup> As China became the most important trading partner for most African countries, it becomes a key economic and development concern that integrating African economies into global value chains also leads to increases in the “share of higher-value activities in its export structure”<sup>96</sup>. Chinese IT aid projects, perhaps, might add here a transnational network of private and state actors to the picture which pushes digitalization in various African countries.

This results in a unique constellation of Chinese and local actors in the African tech landscape that contradicts the often-one-dimensional understanding of the impact of “Chinese state capitalism” on African economies.<sup>97</sup> Various studies demonstrate that private tech companies and state-owned enterprises follow different logics of

<sup>93</sup> Chaudhury, Dipanjan Roy: China reportedly investing \$ 8.43 bn in Africa as part of Digital Silk Road initiative. (The Economic Times, October 15, 2021), accessed on 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%20o%20https://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>.

<sup>94</sup> Forum on China-Africa Cooperation Dakar Action Plan (2022-2024). (Ministry of Foreign Affairs of the People’s Republic of China, November 30, 2021), accessed on April 5, 2022, at [https://www.fmprc.gov.cn/mfa\\_eng/wjdt\\_665385/2649\\_665393/202112/t20211202\\_10461183.html](https://www.fmprc.gov.cn/mfa_eng/wjdt_665385/2649_665393/202112/t20211202_10461183.html).

<sup>95</sup> Nyabiage, Jevans: Chinese investors are again pouring millions into Africa’s fintech start-ups. (South China Morning Post, August 29, 2022), accessed on April 5, 2022, at <https://www.scmp.com/news/china/diplomacy/article/3146678/chinese-investors-are-again-pouring-millions-africas-fintech>.

<sup>96</sup> Fuchs, Andreas: Africa benefits from trade with Asia and China. (IFW Kiel Institute For The World Economy, September 2, 2020), accessed on April 5, 2022, at <https://www.ifw-kiel.de/publications/media-information/2020/africa-benefits-from-trade-with-asia-and-china/>.

<sup>97</sup> Wang, Rong, Bar, François, and Hong, Yu: ICT aid flows from China to African countries: A communication network perspective, in: International Journal of Communication, Vol. 14, 2020, pp. 1498-1523 (p. 1498).

investment, organization and engagement with local actors. Most importantly, African societies and governments are not passive but follow their own interests. This heterogeneous agency is a crucial part of the new reality in African technological developments.<sup>98</sup>

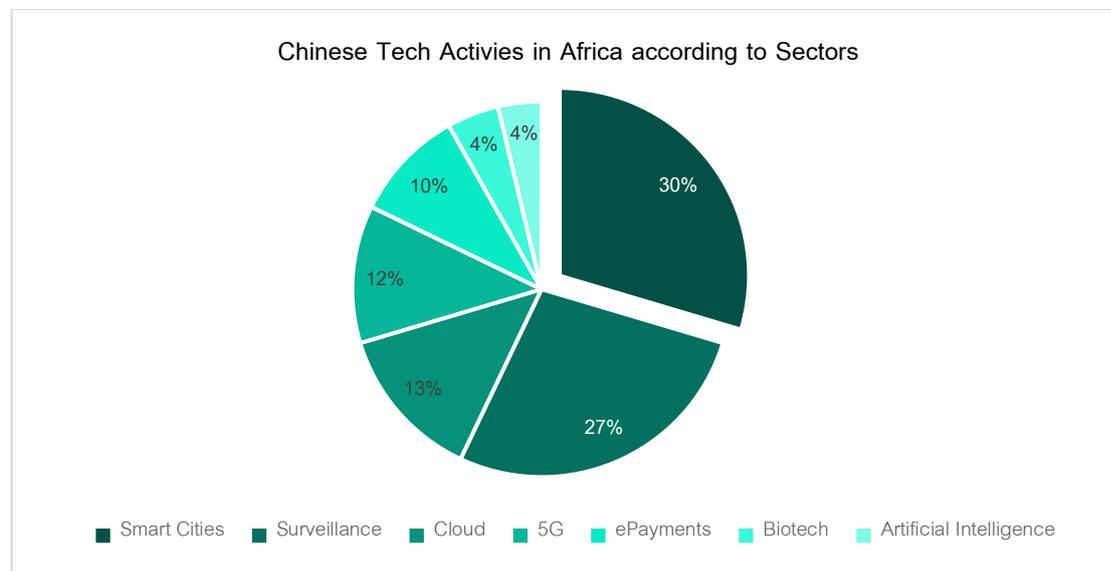


Chart: M. Mayer (2022). Source: Australian Strategic Policy Institute.

Given the cheap and reliable technological solutions Chinese companies provide from smartphones and sea cables to 5G infrastructure and smart surveillance technologies, it is unquestionable that Chinese digital technologies are quickly becoming crucial components at all levels of the African tech stake. The involvement of Huawei in multiple “Safe City” projects across African countries, therefore, 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.”<sup>99</sup>

In some cases, Chinese companies used IT standards for ICT broadband backbone that were only compatible with Huawei routers.<sup>100</sup> Another example is massive Chinese investments in the construction of the 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 regionally leading states.

However, US companies including Google, Facebook and Elon Musk’s Starlink also build enormous new infrastructures including satellite-based internet access and new sea cables that link Africa with other continents.<sup>101</sup> As a result, African governments will on the one hand greatly increase their infrastructural power

<sup>98</sup> Chen, Weiwei: China and Africa: Ethiopia case study debunks investment myths. (The Conversation, February 21, 2022), accessed on 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.

<sup>99</sup> Hillman, Jonathan E. and McCalpin, Maesea: Watching Huawei’s “Safe Cities”. (Center for Strategic and International Studies, CSIS Briefs, November, 2019), accessed on April 5, 2022, at [https://csis-website-prod.s3.amazonaws.com/s3fs-public/publication/191030\\_HillmanMcCalpin\\_HuaweiSafeCity\\_layout\\_v4.pdf](https://csis-website-prod.s3.amazonaws.com/s3fs-public/publication/191030_HillmanMcCalpin_HuaweiSafeCity_layout_v4.pdf).

<sup>100</sup> Vaidyanathan, Veda 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.

<sup>101</sup> Wright, *ibid.*

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 (stake) entails components from the rivalling technology poles – defying the binary exclusionary logic of the US Clean Network Initiative. So, African technology sectors and infrastructures are poised to become a hotbed for great power competition which evolves around China, the EU’s global gateway and a renewed US interest in Africa.<sup>102</sup>

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 can 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, concerning the members of the Gulf Cooperation Council (GCC), China “has the upper hand on the normative side of this competition” with the US, while Chinese firms “play an integral role in affordable 5G network development”<sup>103</sup>. There is 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, shaping 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.”<sup>104</sup>

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.”<sup>105</sup> Chinese companies are active within and across all levels of the stack in African countries,<sup>106</sup> 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”.<sup>107</sup> In sum, Chinese-provided data infrastructures are increasingly

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<sup>102</sup> Runde, Daniel, Savoy, Conor and Staguhrn, 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), accessed on April 5, 2022, at <https://www.csis.org/analysis/china-and-smes-sub-saharan-africa-window-opportunity-united-states>; see also: Lau, Stuart and Moens, Barbara: EU tempts Africa away from Chinese influence. (Politico, February 15, 2022), accessed on April 5, 2022, at <https://www.politico.eu/article/eu-tempts-africa-away-from-chinese-influence/> and Schneidman, Witney and Wiegert, Joel: Competing in Africa: China, the European Union, and the United States. (Brookings, April 16, 2018), accessed on April 5, 2022, at <https://www.brookings.edu/blog/africa-in-focus/2018/04/16/competing-in-africa-china-the-european-union-and-the-united-states/>.

<sup>103</sup> Khorrami, Nima: The Great Power Race in GCC Cyberspace. (Carnegie Endowment For International Peace, December 14, 2020), accessed on April 5, 2022, at <https://carnegieendowment.org/sada/83446>.

<sup>104</sup> Bagwandeem, Mandira: Don’t blame China for the rise of digital authoritarianism in Africa. (Foreign Policy Research Institute, September 13, 2021), accessed on April 5, 2022, at <https://www.fpri.org/article/2021/09/dont-blame-china-for-the-rise-of-digital-authoritarianism-in-africa/>.

<sup>105</sup> Tong, Amy: China’s ICT Engagement in Africa: A Comparative Analysis. (The Yale Review of International Studies, Volume 11, 2021), accessed on April 5, 2022, at <http://yris.yira.org/essays/4702>.

<sup>106</sup> Agbebi, Motolani: China’s Digital Silk Road and Africa’s Technological Future. (Council on Foreign Relations, February 1, 2022), accessed on April 5, 2022, at [https://www.cfr.org/sites/default/files/pdf/Chinas%20Digital%20Silk%20Road%20and%20Africas%20Technological%20Future\\_FINAL.pdf](https://www.cfr.org/sites/default/files/pdf/Chinas%20Digital%20Silk%20Road%20and%20Africas%20Technological%20Future_FINAL.pdf).

<sup>107</sup> Gagliardone, *ibid.*

widespread in African countries. They are becoming co-constitutive for states and societies, yet, without easily exporting and implanting Chinese norms and principles.

## 9. China's Soft Power in Africa: Potentials and Limits

The Rise of China, among the most consequential and most fiercely discussed topics in global politics of late, does not make itself felt in its increasing military clout or growing economic prowess alone. In other words, it is not restricted to the realm of hard power already discussed above. Rather, China also massively stepped up its efforts to increase national soft power around the globe in recent years – and Africa has been assigned a special place in this global scramble for attraction. Soft power, at its core, refers to “the ability to get what you want through attraction rather than coercion or payments.”<sup>108</sup> Accordingly, states and other actors on the international stage seek to apply soft power in order to create followership, to convince and attract others of the desirability of their agenda, and – ultimately – to get desired (political) outcomes. It rests on such resources as culture, foreign policies, and values and can be disseminated globally by such instruments as public and personal diplomacy.<sup>109</sup>

Public diplomacy tools in particular rate high among the instruments at a nation's disposal. Among them, cultural diplomacy (e.g., the establishment of cultural institutes, programs, or exhibitions), international broadcasting (e.g., news programs, radio stations, or online services), and exchange diplomacy (e.g., student or professional exchange and scholarship programs) count among the most important.<sup>110</sup> Since attractiveness to a

Soft power refers to the ability to get desired outcomes in international relations not by (military) coercion or (economic) inducement, but by (cultural) attraction.

considerable degree lies in the eyes of the beholder, opinion polls or surveys play a major role in examining the reception side, and hence the very success or failure of soft power.

Keeping this understanding of soft power in mind, we do observe a number of developments indicating China's soft power expansion towards Africa over the last years. At least since Hu Jintao, President of the People's Republic of China from 2003 to 2013, called for an enhancement of national cultural activities in his much-noticed speech at the 17th National Congress of the Communist Party of China (CPC) on October 15, 2007, soft power prominently entered the Chinese foreign policy discourse. President Hu thus argued, explicitly referring to the concept of soft power in his speech, “In the present era, culture has become a more and more important source of national cohesion and creativity and a factor of growing significance in the competition in overall national strength.”<sup>111</sup> Four years later, in 2011, Hu reaffirmed his intention to put special emphasis on the role of Chinese culture as a means to foster national soft power. On the occasion of the 90th Anniversary Gathering of the Communist Party of China, he thus remarked, “We should bring Chinese culture to the world, develop cultural soft power compatible with China's international standing, and increase the influence of Chinese culture in the world.”<sup>112</sup>

<sup>108</sup> Nye, Joseph S., Jr.: *Soft Power: The Means to Success in World Politics*, New York 2004, p. X.

<sup>109</sup> Ohnesorge, Hendrik W.: *Soft Power: The Forces of Attraction in International Relations*, Cham 2020, pp. 85-171.

<sup>110</sup> Cull, Nicholas J.: *Public Diplomacy: Taxonomies and Histories*, in: *The Annals of the American Academy of Political and Social Sciences*, Vol. 616, March 2008, pp. 31-54.

<sup>111</sup> Hu, Jintao: *Hold High the Great Banner of Socialism with Chinese Characteristics and Strive for New Victories in Building a Moderately Prosperous Society in all*, Report to the Seventeenth National Congress of the Communist Party of China, October 15, 2007, accessed on March 15, 2022, at <http://www.china.org.cn/english/congress/229611.htm>.

<sup>112</sup> Hu, Jintao: *Speech at the Communist Party of China 90<sup>th</sup> Anniversary Gathering*, July 1, 2011, accessed on March 15, 2022, at [http://www.china.org.cn/china/CPC\\_90\\_anniversary/2011-07/01/content\\_22901507\\_14.htm](http://www.china.org.cn/china/CPC_90_anniversary/2011-07/01/content_22901507_14.htm).

In response to such calls to action, China soon and drastically increased its efforts in virtually all of the major instruments of soft power noted above. David Shambaugh, for example, calculated that already in 2013 China spent an estimated USD 7-10 billion per year on its international publicity efforts.<sup>113</sup> While Chinese efforts, as part of a global “Going Out Strategy,” are directed at the entire world, the African continent has featured prominently from a very early point.<sup>114</sup> In particular, the soft power instruments of international broadcasting, cultural diplomacy, and exchange diplomacy have played a key role ever since. Accordingly, they shall gain center stage in the following.

### Media as Power

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.”<sup>115</sup> Practiced as early as in World War I, radio and newsreel were increasingly used to inform and influence foreign publics 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, not least, to produce financial profits.<sup>116</sup> With the creation and continual expansion of media outlets such as these, China seeks to provide an alternative to the predominantly Western-dominated media “by presenting China’s own version of issues and events happening inside China, Asia, and the world.”<sup>117</sup>

The “Big Four” in Chinese international media presence (Xinhua News Agency, Central China Television, China Radio International, and China Daily) have stepped up their game of late – and Africa has become a key target across the board.

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.<sup>118</sup> 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!”<sup>119</sup>

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, besides its flagship headquarters in Beijing, it has two production centers abroad: one in the US (Washington, D.C.) and one in Kenya (Nairobi). In recent years, programs were expanded dramatically and are accompanied by a strong

<sup>113</sup> Shambaugh, David: China Goes Global: The Partial Power, New York 2013, p. 207.

<sup>114</sup> Grassi, Sergio: Changing the Narrative: Chinas mediale Offensive in Afrika, Internationale Politikanalyse, Friedrich-Ebert-Stiftung, Berlin 2014, p. 1.

<sup>115</sup> Price, Monroe E., Haas, Susan, 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).

<sup>116</sup> Shambaugh, *ibid.*, p. 227.

<sup>117</sup> Zhang, Xiaoling.: Chinese State Media Going Global, in: East Asian Policy, Vol. 2, No. 1, 2010, pp. 42-55 (p. 43).

<sup>118</sup> Agence France-Presse (AFP), Xinhua News Agency, accessed on March 15, 2022, at <https://www.afp.com/en/products/partners/xinhua-news-agency>.

<sup>119</sup> Shambaugh, *ibid.*, p. 230.

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.<sup>120</sup>

Considering initiatives on the airwaves, China has in recent years heavily invested in the global outreach of **China Radio International (CRI)**. Founded as Radio Beijing in 1941, CRI meanwhile is broadcasting globally in 30 foreign bureaus and 43 languages. Attesting once more to the special significance of Africa in China's media and soft power strategy, its first radio staying broadcasting on FM abroad was launched in Nairobi in 2006.<sup>121</sup> Lastly, **China Daily** takes pride of its place as 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.<sup>122</sup> In recent years, the Chinese government has been investing huge sums into China Daily, with the African market as a particular target once again.<sup>123</sup> The launch of a specific China Daily Africa Edition in December 2012 emphasizes this.<sup>124</sup>

In the final analysis, the "Big Four" in the Chinese media landscape, and among them especially the 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."<sup>125</sup>

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 decided closeness to the CPC has, according to some surveys and studies, discredited much of the Chinese media outreach. In the highly competitive international media landscape, Xinhua, in particular, has yet to deliver itself from the accusation of merely transmitting state propaganda and get rid of what has been called the "Xinhua stigma."<sup>126</sup> 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.<sup>127</sup>

### **Confucius Institutes: Intensity and Distribution**

Besides 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 Classrooms at universities and schools around the world. With their very

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<sup>120</sup> Rawnsley, Gary D.: *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).

<sup>121</sup> CRIonline: *Über uns*, September 17, 2019, accessed on March 15, 2022, at <http://german.cri.cn/wir/wir/3268/20190917/351604.html>.

<sup>122</sup> Shambaugh, *ibid.*, pp. 233-234.

<sup>123</sup> Grassi, *ibid.*, pp. 1-3.

<sup>124</sup> *China Daily: Pages of History*, 2016, accessed on March 15, 2022, at <http://www.chinadaily.com.cn/china/cd35years/index.html>.

<sup>125</sup> Arquilla, John and Ronfeldt, David: *The Emergence of Noopolitik: Toward an American Information Strategy*, Santa Monica 1999, p. 53.

<sup>126</sup> *Bloomberg Businessweek: Bloomberg, Reuters – and Xinhua?*. February 16, 2003, accessed on March 15, 2022, at <http://www.businessweek.com/stories/2003-02-16/bloomberg-reuters-and-xinhua>.

<sup>127</sup> 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 on March 15, 2022, at <https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2018-01/Expansion%20of%20International%20Broadcasting.pdf>, p. 12.

designation, these institutes allude to the focus on culture and Confucian values, like family and harmony, as major sources of Chinese soft power.<sup>128</sup>

Since the first Confucius Institute opened its doors in Seoul in 2004, numbers have virtually exploded and now stand at about 550 institutes around the world. As depicted in the map above, the main target regions for Chinese cultural institutes are still the US (with 85 institutes in 2021, despite a slight decrease in recent years) as well as the UK (with 30 institutes). Africa, as a continent, however, has seen a steep increase of late.<sup>129</sup> In fact, Confucius Institutes have become, according to CGNT, “a bedrock of China’s growing cultural ties with Africa”.<sup>130</sup> And since the first Chinese cultural institute on the African continent opened in Nairobi in December 2005, the number of Confucius Institutes is now second only to that of comparable French institutions. Until 2018 alone, more than seven million students had attended Chinese language and cultural classes around the world, emphasizing the broad reach of Chinese cultural programs.<sup>131</sup>

### Cultural Institutes in Africa

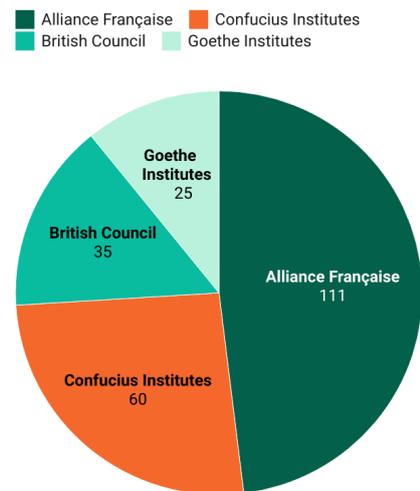
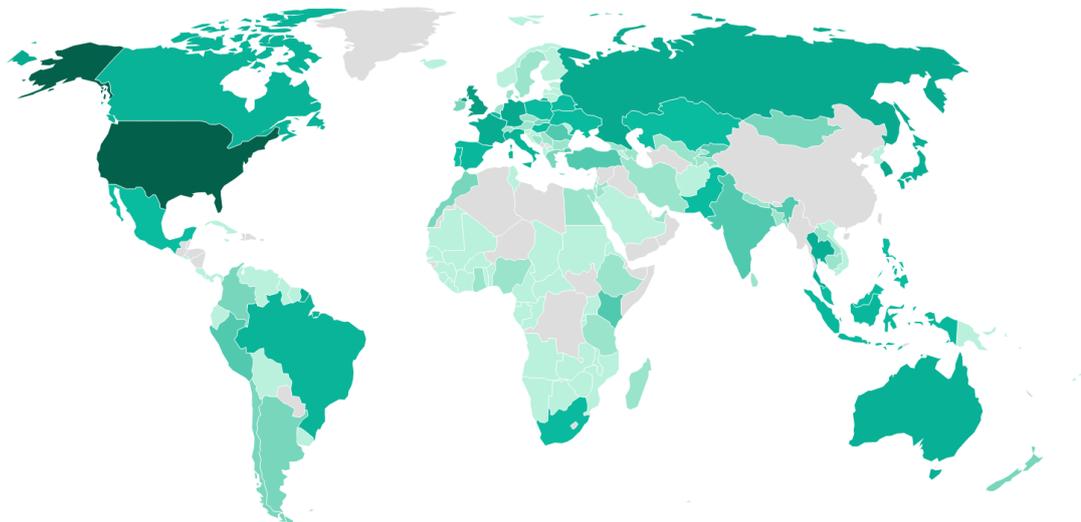


Chart: H. Ohnesorge (2022) • Source: Dig Mandarin; Goethe Institut; British Council; Fondation des Alliances Françaises • Created with Datawrapper

Meanwhile, however, Chinese Confucius Institutes have also become both the target of scholarly debate and political controversy. Accordingly, charges of political bias and propaganda have repeatedly been made, resulting even in the closing down of some institutes. Also, recent polls by the Afrobarometer indicate that among

### Confucius Institutes Around the World, 2021



Map: H. Ohnesorge (2022) • Source: Dig Mandarin 2021 • Created with Datawrapper

<sup>128</sup> Cho, Young Nam and Jong, Ho Jeong: China’s Soft Power: Discussions, Resources, and Prospects, in: Asian Survey, Vol. 48, No. 3, May/June 2008, pp. 453-472 (p. 470).

<sup>129</sup> Digmandarin: Confucius Institutes around the World – 2021, February 22, 2021, accessed on March 15, 2022, at <https://www.digmandarin.com/confucius-institutes-around-the-world.html>.

<sup>130</sup> Bhaya, Abhishek G.: Confucius Institutes a bedrock of China’s growing cultural ties with Africa, August 22, 2018, accessed on March 15, 2022, at [https://news.cgnt.com/news/3d3d514f346b544e79457a6333566d54/share\\_p.html](https://news.cgnt.com/news/3d3d514f346b544e79457a6333566d54/share_p.html).

<sup>131</sup> Ibid.

those 34 African countries polled, the Chinese language is named only by 3 per cent as the “most important international language to learn,” far behind English (69 per cent) and French (14 per cent).<sup>132</sup>

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.<sup>133</sup> In fact, the establishment and deepening of cultural relations at large have been described as a key interest at least since the 2006 White Paper on African Policy, even though some researchers also attested to a certain imbalance within the relationship.<sup>134</sup>

### Students and People-to-People Exchanges

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 thus increased from 403,175 in 2006 to 719,014 in 2013 to 1,061,511 in 2019 – an increase by 163 per cent. During the same time period, inbound international students studying at Chinese institutions of higher education increased from 36,386 in 2006 to 96,409 in 2013 to 201,177 in 2019 – an increase of 453 per cent.<sup>135</sup> In recent years, in particular, 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 up 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.<sup>136</sup> In more recent times, however, this development has gathered pace dramatically: from 1,793 African students at Chinese universities in 2003 to 16,404 in 2010 to 81,562 students in 2018, an overall increase of about 4,500 per cent or 300 per cent annually over a 15 year period.<sup>137</sup>

### Chinese International Student Mobility

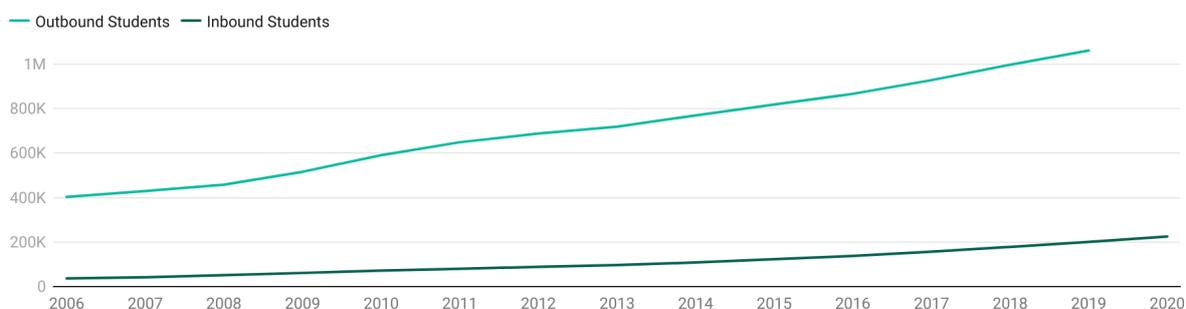


Chart: H. Ohnesorge · Source: UNESCO Institute for Statistics (UIS) · Created with Datawrapper

<sup>132</sup> Appiah-Nyamekye Sanny, *ibid.*, p. 18.

<sup>133</sup> Xinhua News Agency, China, Africa Boost Soft Power through Cultural Exchanges, June 19, 2006, accessed on March 15, 2022, at <http://www.china.org.cn/english/features/wenjiabaoafrica/171843.htm>.

<sup>134</sup> Batchelor, Kathryn: How Genuine is China-Africa Cultural Cooperation?. Policy Briefing, accessed on March 15, 2022, at <https://www.nottingham.ac.uk/research/groups/ctccs/documents/policy-briefing-china-africa-cultural-cooperation.pdf>.

<sup>135</sup> UNESCO Institute for Statistics (UIS): UIS.Stat, accessed on March 15, 2022, at <http://data.uis.unesco.org>.

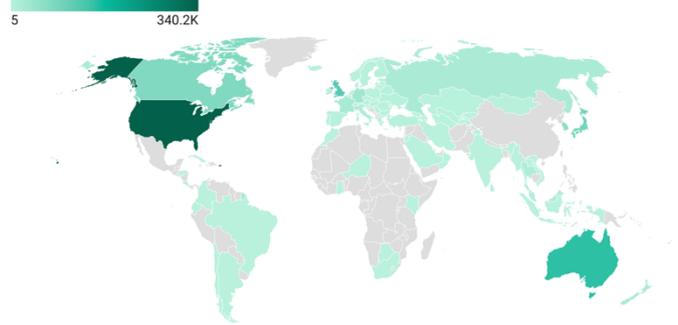
<sup>136</sup> Liu, Hongwu and Luo, Jianbo: Sino-African Development Cooperation: Studies on the Theories, Strategies, and Policies, Singapore 2021, p. 116.

<sup>137</sup> Breezegeography: Update to: Stats on International Students Studying in China, June 26, 2019, accessed on March 15, 2022, at [http://en.moe.gov.cn/news/press\\_releases/201904/t20190418\\_378586.html](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 per cent 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 towards China among African students, stemming not least from lower tuitions fees as well as lower language and visa requirements.<sup>138</sup> 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, especially in the long run: “It is

### Chinese Students Studying Abroad, 2019



Map: H. Ohnesorge (2022) • Source: UNESCO Institute of Statistics, Global Flow of Tertiary-Level Students • Created with Datawrapper

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.”<sup>139</sup>

### International Students in China, 2018

Asia Africa Europe America  
Oceania

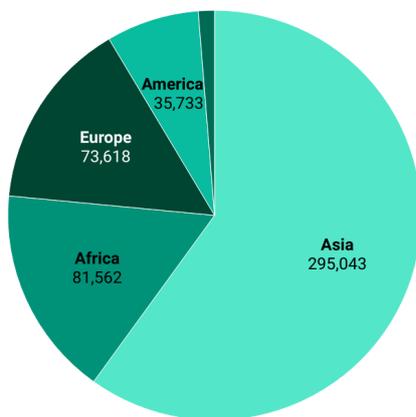


Chart: H. Ohnesorge (2022) • Source: Ministry of Education of the People's Republic of China 2019 • Created with Datawrapper

Concerning outgoing Chinese students, globally and with particular respect to Africa, however, the picture is a different one. According to data from the UNESCO Institute of Statistics, the US (340,222), Australia (155,594), and the UK (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 students in 2019.<sup>140</sup> Once more, a certain imbalance becomes visible in the incoming-outgoing ratio of international students. Besides these “classical” examples of exchange diplomacy, 2,300 institutions offer joint-degree programs alongside Chinese partners around the world and nine universities have established joint campuses in China (3 from the US, 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.<sup>141</sup>

Due to the deficits of African immigration management and government infrastructure, the statistics of Chinese emigrants and international students in Africa have no accurate and unified data for the time being, and the data from different sources are conflicting at times. According to research data from the Blue Book of Overseas

<sup>138</sup> Kigotho, Wachira: Educational Superhighway from Africa to China Speeds up Mobility, University World News, November 19, 2020, accessed on March 15, 2022, at <https://www.universityworldnews.com/post.php?story=20201118132655210>.

<sup>139</sup> Ibid.

<sup>140</sup> UNESCO Institute for Statistics (UIS): Global Flow of Tertiary-Level Students, accessed on March 15, 2022, at <http://uis.unesco.org/en/uis-student-flow>.

<sup>141</sup> Economist Intelligence: How Will the Coronavirus Affect Outbound Chinese Students?. September 25, 2020, accessed on March 15, 2022, at <https://www.eiu.com/n/how-will-the-coronavirus-affect-outbound-chinese-students/>.

Chinese (2011), as of 2010, there were 250,000 Chinese emigrants in Africa.<sup>142</sup> According to another source on the website of the Overseas Chinese Affairs Office of the State Council of PRC, there were at least 500,000 Chinese doing business in Africa around 2010.<sup>143</sup> Chinese scholar Lv Ting mentioned in his article *Analysis of Educational Needs and Exploration of Supply Model for New Emigrants of Chinese Diaspora in Africa* published in *Annual Report on Overseas Chinese Study (2016)* that China has 550,000 people in Africa, accounting for 1.2 per cent of China's emigrant population abroad, and Africa is the last in the destination continent for emigrants (78.1 per cent in Asia, 13.9 per cent in America, 4.7 per cent in Europe, 2.1 per cent in Oceania, and 1.2 per cent in Africa).<sup>144</sup>

**Destination Continents for Chinese Emigrants**

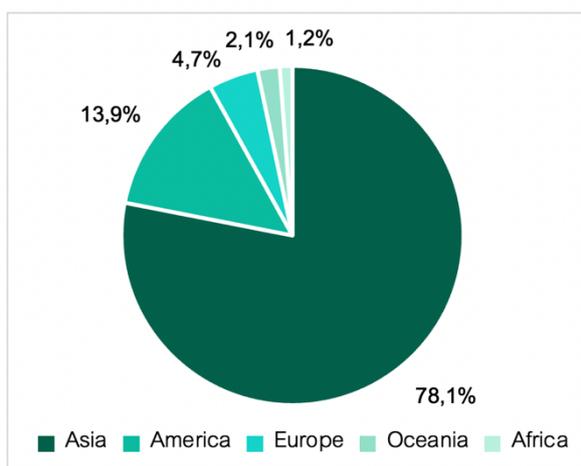


Figure: X. Ke (2022). Source: Lv 2016.

**Number of Chinese workers in Africa per year**

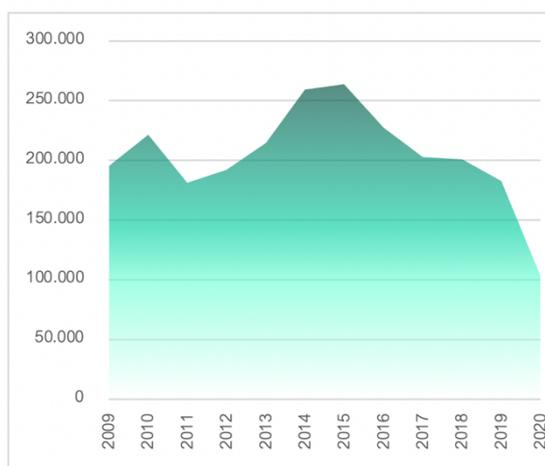


Figure: X. Ke (2022). Source: National Bureau of Statistics of China.

The number of Chinese workers in Africa at the end of 2020 was 104,074, a 43 per cent 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 are Algeria, Nigeria, Ethiopia, the DRC and Angola. These five countries accounted for 46 per cent of all Chinese workers in Africa by the end of 2020; Algeria alone accounted for 17 per cent. These figures include Chinese workers sent to Africa to work on construction contracts for Chinese companies (contract workers) and Chinese workers employed in other labor sectors, such as those working in factories (workers engaged in general labor); they are reported by Chinese contractors and do not include informal migrants such as traders and shopkeepers.<sup>145</sup>

<sup>142</sup> Liu, Zhang: *Lives and Development of Chinese Diaspora in Africa (非洲中国海外移民的生存和发展)*, 2015, accessed on March 31, 2022, at <http://qwgzyj.gqb.gov.cn/yjyt/181/2584.shtml>.

<sup>143</sup> Yuan, Zhuang: *African Chinese Business Profile Analysis (非洲华商概况分析)*, 2011, accessed on March 31, 2022, at <http://qwgzyj.gqb.gov.cn/yjyt/159/1742.shtml>.

<sup>144</sup> 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, 2016.

<sup>145</sup> CARI: DATA: CHINESE WORKERS IN AFRICA, accessed on March 31, 2022, at <http://www.sais-cari.org/data-chinese-workers-in-africa>.

## 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 poses development pressure on Africa. With its comprehensive cooperation with African countries in diplomacy, trade, investment, health, vaccine, medicine, security, energy, technology, media and culture, China has proven to be neither a manipulator of "debt trap", nor a booster of "Neo-Colonialism", neither a "Resource Plunder" nor a "Trade Predator".<sup>146</sup>

Negative impacts such as supplanting of local manufacturers by more advanced Chinese producers, trade frictions or unfair deals and agreements enforced by some Chinese companies remain sporadic and locally limited. In this context, Conteh-Morgan highlights that "intangible rhetoric" from the US accusing China of "sabotaging the neo-liberal democratic capitalistic order on the continent" might be "laudable". He believes, however, "they 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."<sup>147</sup>

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

*"The recent narrative that China is "colonizing Africa" economically is strongly refuted by African leaders and not corroborated by evidence. To talk about neocolonialism in the 21st 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 neocolonialism 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."*<sup>148</sup>

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 negotiation 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 US, China (and less so the EU). However, all indications are that African governments will be likely to follow their independent course and will not join the US-led Clean Network Initiative – an expression of a multi-polar and interdependent tech world in the global South.

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<sup>146</sup> Armel, 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, accessed on April 22, 2022, at <https://www.worldscientific.com/doi/pdf/10.1142/S2630531321500025>.

<sup>147</sup> Conteh-Morgan, Earl: Strategies of Sino-American Rivalry in Africa: From 2000 to Covid-19, in: Vestnik RUDN. International Relations, Vol. 21, No. 2, pp. 265-278 (p. 275), accessed on March 23, 2022, at <https://doi.org/10.22363/2313-0660-2021-21-2-265-278>.

<sup>148</sup> Chanaka, *ibid.*

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*Publisher:* Center for Global Studies (CGS)  
Chair for International Relations  
Rheinische Friedrich-Wilhelms-Universität Bonn

*ISSN:* 2698-976X

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*Responsible for Content:* Prof. Dr. Xuewu Gu  
Director of the Center for Global Studies (CGS)

*Design Editors:* Christiane Heidbrink  
Clara Dinkelbach

*Front Page:* Designed with Canva

*Published:* June 2022