China's Economic Influence in Africa: A Data-Driven Analysis

ie China Observatory

ie Africa Program

CKGSB
长江商学院
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AFROBAROMETER
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Summary

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Foreword

ENRICO LETTA
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It is with great pride that we present China's Economic Influence in Africa: A Data-Driven Analysis, a report produced by our China Observatory and Cheung Kong Graduate School of Business (CKGSB) in collaboration with Afrobarometer and the IE Africa Program. This publication marks the third joint effort between IE University and CKGSB and reflects our shared commitment to fostering a rigorous, evidence-based understanding of China's global economic footprint.

For this edition, we are especially grateful for the partnership of Afrobarometer, whose pan-African reach and data expertise were essential to the realization of this project. In a region where access to reliable, comparable data remains a serious challenge, Afrobarometer's long-standing network and methodological integrity make it an indispensable resource. We extend our sincere thanks to Joseph Asunka, CEO of Afrobarometer, for his trust, vision, and generous collaboration. His own contribution to this volume reflects the spirit of partnership and shared purpose that made this report possible.

This report adopts an empirical methodology based on large-scale survey data from 27 African countries, collected by Afrobarometer. It addresses a timely and strategic question: How do ordinary citizens across Africa perceive China's economic influence? While headlines often focus on infrastructure investments, loans, or official diplomacy, this report shifts the focus—it listens to people. Through Afrobarometer's extensive survey network, we capture the voices of Africans, offering insights into how Chinese engagement is experienced on the ground.

China's role in Africa has expanded significantly over the past two decades, spanning trade, infrastructure, finance, education, and technology. However, its impact is neither uniform nor static. The findings presented here show a landscape of perceptions that vary by country, region, demographic, and socioeconomic status. This diversity of views calls for a nuanced, context-sensitive understanding of China's presence.

At a time when geopolitical narratives are increasingly polarized, we see this report as an example of how cooperation between academic institutions, research organizations, and civil society can help shed light on the realities on the ground. We believe that data-driven, transparent research such as this can play a vital role in building deeper understanding.

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The EU's Global Gateway has emerged as its flagship geopolitical and geoeconomic initiative for Africa, aiming to mobilise up to €150 billion by 2030. Through investments in physical and digital infrastructure, energy transformation, strategic transport networks, health, education, and research, the Global Gateway seeks to promote sustainable and mutually beneficial cooperation and development and shared prosperity. It offers a model of engagement rooted in transparency, democratic values, and long-term partnerships.

Yet, this and other EU-led initiatives stand to benefit from approaches that incorporate robust data and local perspectives. The report opens space for a more informed and constructive dialogue among Africa, China, and Europe.

Finally, we would like to stress that this report is not an endpoint but a starting point—for further research, dialogue, and collaboration. We hope it will inspire future work that continues to build bridges across continents in pursuit of sustainable development and inclusive international engagement.

We are grateful to all those who made this publication possible and look forward to continuing this important work in the years to come.

Globalization and Localization: Strategic Choices Driving the Long-term Development of Chinese Enterprises

HAITAO LI
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Balancing global perspectives with local needs in the process of globalization has moved from a theoretical discussion to a pressing issue of practice.

Chinese enterprises are now in the global spotlight, facing increasingly complex challenges and expanding opportunities. The current era is critical, with major shifts in the international landscape which provide a strategic window for China's development. Economic globalization remains a major and irreversible trend, while the common crises facing humanity require collective solutions.

As an important driving force of globalization, the need for companies to find new momentum in balancing globalization and localization has become a core strategic issue for expansion and competition. Against this backdrop, Chinese enterprises must develop a clear insight into the profound changes in the global economic landscape, define a clear strategic direction and continue to enhance their international competitiveness.

Five Stages of Enterprise Globalization

The globalization of enterprises can usually be divided into five progressive stages, each reflecting an evolution from market expansion to deep organizational transformation.

1. Globalized Sales: Enterprises view overseas markets as sales channels and meet demand through exports. Globalization here is defined narrowly as market coverage, with competencies centered in the home country.

2. Globalized Operations: Companies begin to set up resident teams to serve local customers directly and innovate their products to suit local needs. This enables deeper cultural understanding and allows for local revenue self-sufficiency, driving further growth.

3. Globalized Capacity Deployment: Enterprises deploy core competence modules across regions based on comparative advantage. From R&D to logistics, firms optimize resource allocation globally to operate efficiently—transitioning into global value chain builders.

4. Globalized Talent: Relying on local talent evolves into the need to attract and integrate global talent. Cross-cultural team-building becomes essential for competitiveness.

5. Globalized Organizational Culture: The highest level of globalization is the globalization of organizational culture. Culture—defined by shared values and conduct codes—must be unified globally. Only after sustained global presence, absorption of a large number of multinational talents, and cultural transmission, can a firm develop a consistent identity across markets.

Throughout these five stages, an enterprise not only shifts from market expansion to deep organizational cultivation, but also from business globalization to cultural globalization, laying a solid foundation for long-term development.

Balancing Globalization and Localization

Globalization and localization are not opposites but interdependent dimensions, closely linked and complementary at all stages of enterprise development. This dialectical relationship runs through all stages—from globalizing sales to internationalizing organizational culture—and companies must find the right balance.

In early stages, localization is essential. Expanding local sales networks and understanding local market needs are foundational. In operations, this means constructing local teams and aligning global resources with local capacity. Global talent strategies must integrate local professionals without compromising core values.

There are two keys to success in this process:

- **Customer demand orientation:** Services and products must reflect local needs and speak the "language that local customers can understand."
- **Budget awareness and robust operations:** Globalization must be financially and operationally sustainable.

Organizational culture poses the greatest tension. While functions can localize, culture must remain unified. If culture is fragmented, synergy and stability suffer.

Successful cultures often stem from the domestic market. Huawei's "Wolf Culture" and TCL's "Spirit of Change" originated in China's entrepreneurial journey and were gradually embodied by global employees during the globalization process.

Transmitting Organizational Culture

A globalized organizational culture does not form spontaneously; it needs to be forged and transmitted through a systematic approach, such as through:

- **Cultural export:** Send culture-aligned managers to local markets to build teams, instill values and drive market expansion.
- **Reverse input:** Bring top local employees to headquarters for cultural immersion and identity building.
- **Rotations:** Facilitate staff exchanges across regions to reinforce cultural consistency.

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This tri-dimensional mechanism sustains cohesion and lays the foundation for long-term global development.

Glocalization Paths: Cases and Insights

Glocalization integrates global and local priorities. Two successful paths illustrate this dynamic:

- Apple: Globalization before localization
Apple began with standardized branding and innovation. Over time, it localized features (e.g., China-specific color schemes) to deepen market penetration.

- Huawei: Localization before globalization
Huawei entered developing markets by localizing early—adapting products and building local teams—then scaled globally after refining offerings. This approach enabled Huawei to overtake Ericsson in 2013.

Regardless of which path is chosen, the balance between globalization and localization is not a one-off event, but a dynamic adjustment process whereby companies need to flexibly optimize their strategies at different stages in response to market changes.

Aggregation Strategy: Enhancing Global Competitiveness

In a challenging global economy, aggregation strategies—resource integration, scale expansion, and operation optimization—offer a path to enhance competitiveness, particularly in new energy and intelligent manufacturing.

Critical enablers:

- **Economies of scale:** Demand concentration enables cost-effective integration.

- Standardization and compatibility: Reduces complexity and improves efficiency.
- Supply chain strength: China's industrial chain depth supports aggregation.
- Management and legal frameworks: Ensure operational control and risk reduction.
- Capital access: Large-scale integration requires sustained funding or strategic investment.

In the New Energy Vehicle (NEV) industry, in which China is a leading global producer, joint efforts across upstream and downstream firms reduce risk and create industrial cluster effects. The key is a long-term industrial vision and insight into the direction of the global industrial chain. For example, Kodali, an enterprise producing lithium battery structural components, entered Hungary with the help of the wider development of China's NEV Industry.

When implementing an aggregation strategy, companies also need to focus on the diversity of industry standards. These standards vary globally, with high-end projects typically following European and American standards even in emerging markets such as Southeast Asia. Therefore, enterprises must be flexible when understanding and adapting to these standards.

Global Production and Resource Allocation

In today's geopolitical context, firms must balance cost with factors like security, supply chain resilience, and trade barriers.

- Security: Security has become a primary consideration for businesses across their global locations. Despite low labor costs and abundant resources, regions like parts of Africa pose operational risks, due to poor infrastructure and a shortage of skilled labor. Firms such as Huawei maintain manufacturing bases in China for security and ecosystem maturity.

- Incomplete relocation: Some companies choose to host the low-end assembly in Southeast Asian countries like Vietnam, but keep their core component production in China due to its unique complete industrial chain. Hence, enterprises need to ensure the integrity of the supply chain and supporting capacity, since if the core support cannot be found, the relocation of some factories may not optimize overall benefits, despite that it may reduce labor costs in the short term.

- Trade barriers: As geopolitical and trade relations change, enterprises need to be more flexible and agile in adjusting their global resource allocation to minimize the impact of barriers. For example, the U.S.-China tensions prompt many Chinese companies to explore markets like Mexico.

Production strategies should align with:

- The political-economic landscape
- Global industrial trends
- Company capabilities

For example, Porton PharmaTech placed R&D in New Jersey and manufacturing in Slovenia to align with U.S. policy and industry proximity.

Decision-making is no longer about finding the lowest cost, but obtaining long-term value and competitive positioning.

> Globalization and localization are not opposites but interdependent dimensions, closely linked and complementary at all stages of enterprise development. This dialectical relationship runs through all stages —from globalizing sales to internationalizing organizational culture—and companies must find the right balance.

New Productive Forces: A Strategic Pivot

China's economic transformation over the past four decades demands a shift from investment-driven to innovation-led growth. Developing new productive forces—centered on high-tech and sustainability—are key.

These forces enable Chinese firms to:
- ▶ Sustain innovation in global slowdown
- ▶ Reshape their industrial advantage
- ▶ Compete in future-facing sectors like AI, new energy, and biomedicine

The essence of global competition is found in innovation, and Chinese enterprises have a unique advantage in this regard. Navigating the massive global market requiring high levels of agility, and Chinese enterprises have demonstrated competitiveness in a number of areas including consumer electronics, e-commerce services and logistics systems, guided by market demand and rapid innovation iteration. For example, China's speed of innovation in the field of packaging equipment far exceeds that of the Southeast Asian market. The government policy support will further unleash the potential of Chinese companies to take a more favorable position in global competition.

Emerging industries, especially high-tech fields such as biomedicine, new energy and artificial intelligence, are becoming the battlefield of future international competition. The advancement of new productive forces will drive transformation and development in these frontier areas. Chinese companies have made remarkable achievements in the new energy sector, but still need to accelerate breakthroughs in other high-tech areas. The policy orientation will lay a solid foundation for Chinese companies to dominate these industries.

Looking Ahead: Achieving Global Success through Innovation and Vision

Enterprises' success hinges on their entrepreneurial spirit—strategic vision, adaptability, and long-term commitment. The path of enterprise growth is essentially the process of entrepreneurs constantly cultivating and innovating themselves. In the face of increasingly complex challenges during globalization, Chinese enterprises need to enhance their international competitiveness by embracing innovation, optimizing supply chains, promoting organizational change and improving entrepreneurial cognizance.

To build global competitiveness, firms should:
- ▶ Conduct original innovation and integrate resources across their supply chains
- ▶ Adapt their organizational structures to global demands
- ▶ Monitor global trends and develop forward-looking strategies

In today's environment, strategic foresight and resilience are paramount for firms to protect their cash flow and enhance their risk response. Meanwhile, the global intelligent revolution means new growth opportunities. To grasp them, companies must move up the value chain, enhancing quality, value, and global fit of their products and services.

As China's global business school, Cheung Kong Graduate School of Business (CKGSB) offers insight and programs for leaders to leverage global politics, AI, and digital transformation with vision and innovation. We help business leaders and their enterprises worldwide thrive in today's complex international landscape with the best practices from China and its global implications.

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China's Economic Influence in Africa: A Data-Driven Analysis

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China's economic engagement in Africa has been a subject of significant academic and policy debate, shaping discussions on global trade, investment, and diplomacy. Over the past two decades, China has emerged as a key economic partner for African nations, driving large-scale infrastructure projects, fostering trade relationships, and expanding financial investments. Understanding how China's influence has evolved over time—and how it is perceived across different African nations—offers crucial insights into the continent's economic trajectory and its shifting geopolitical alliances. This study examines the extent and nature of China's economic influence in Africa, comparing perceptions from 2016 to 2023. By analyzing public attitudes toward China's economic assistance, business investment, and development model, this research sheds light on how China is shaping Africa's development path and how these perceptions have changed over time.

> "Emerging industries, especially hightech fields such as biomedicine, new energy and artificial intelligence, are becoming the battlefield of future international competition. The advancement of new productive forces will drive transformation and development in these frontier areas. Chinese companies have made remarkable achievements in the new energy sector, but still need to accelerate breakthroughs in other high-tech areas.

This study leverages a comprehensive dataset covering 27 African countries, representing all five regional classifications as defined by the United Nations:[1] Northern Africa (e.g., Morocco, Tunisia), Western Africa (e.g., Nigeria, Ghana), Middle Africa (e.g., Cameroon), Eastern Africa (e.g., Kenya, Tanzania), and Southern Africa (e.g., South Africa, Botswana). These countries were selected to provide a broad and regionally representative perspective on economic perceptions. The dataset captures responses from two survey years—2016

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Public perception data provides a critical complement to traditional economic indicators, offering insight into how ordinary citizens—rather than just policymakers and economists—interpret China's engagement on the ground. By examining the changing perceptions of China as a development model, economic partner, and political ally, this study provides a datadriven foundation for understanding the geopolitical and economic realignment of African nations.

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and 2023—offering a longitudinal perspective on how attitudes toward China's economic role have evolved over time. This dataset provides a broad perspective on regional diversity, encompassing countries with varying population sizes[2] and economic statuses [3]. For instance, Nigeria, the most populous African country, has over 232 million people and a GDP of $477 billion. The diversity of the sample also reflects varied economic structures, ranging from major economic hubs like South Africa and Morocco to smaller economies like Liberia and Lesotho. This variation allows for a nuanced analysis of how economic conditions, trade partnerships, and infrastructure investments shape public perceptions of China across different national contexts.

The value of this dataset lies in its ability to quantify and contextualize China's growing role in Africa's development trajectory. Public perception data provides a critical complement to traditional economic indicators, offering insight into how ordinary citizens—rather than just policymakers and economists—interpret China's engagement on the ground. By examining the changing perceptions of China as a development model, economic partner, and political ally, this study provides a data-driven foundation for understanding the geopolitical and economic realignment of African nations. This research also contributes to broader discussions on global South-South cooperation, the rise of multipolar economic influences, and the future of Africa's international partnerships. Our main findings offer insights into the landscape and effectiveness of Chinese loans and economic assistance, the factors contributing to China's positive image, the perceptual preferences regarding different development models, etc. Additionally, we reveal the conditions tied to these forms of assistance and the perceived burdens they impose. As China continues to expand its presence on the continent, these findings are essential for scholars, policymakers, and investors seeking to navigate the complexities of Africa's evolving economic landscape.

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(1) United Nations Statistics Division. (n.d.). Standard country or area codes for statistical use (M49). Retrieved January 10, 2025, from https://unstats.un.org/unsd/methodology/m49/

(2) Worldometer. (2024). Countries in Africa by population (2024). Retrieved November 23, 2024, from https://www.worldometers.info/population/countries-in-africa-by-population/

(3) World Bank. (2023). Gross domestic product (GDP) statistics. Retrieved November 23, 2024, from https://databank.worldbank.org/source/world-development-indicators

COUNTRY	UN REGION	POPULATION (2024)	GDP (2023 BILLION)	N (2016)	N (2023)
Morocco	Northern Africa	38.081.173	142,87	1.200	1.200
Tunisia	Northern Africa	12.277.109	46,37	1.200	1.200
Benin	Western Africa	14.462.724	21,32	1.200	1.200
Burkina Faso	Western Africa	23.548.781	21,65	1.200	1.200
Côte d'Ivoire	Western Africa	31.934.230	78,79	1.199	1.200
Ghana	Western Africa	34.427.414	76,37	2.400	2.400
Guinea	Western Africa	14.754.785	16,28	1.200	1.200
Liberia	Western Africa	5.612.817	3,49	1.199	1.200
Mali	Western Africa	24.478.595	22,52	1.200	1.200
Niger	Western Africa	27.032.412	16,28	1.200	1.199
Nigeria	Western Africa	232.679.478	477,05	2.400	1.599
Senegal	Western Africa	18.501.984	25,47	1.200	1.200
Sierra Leone	Western Africa	8.642.022	4,76	1.191	1.200
Togo	Western Africa	9.515.236	10,76	1.200	1.200
Cameroon	Middle Africa	29.123.744	44,46	1.182	1.200
Kenya	Eastern Africa	56.432.944	107,44	2.397	2.400
Malawi	Eastern Africa	21.655.286	14,08	2.400	1.200
Mauritius	Eastern Africa	1.271.169	14,40	1.200	1.200
Mozambique	Eastern Africa	34.631.766	16,28	2.400	1.110
Tanzania	Eastern Africa	68.560.157	79,16	2.386	2.398
Uganda	Eastern Africa	50.015.092	47,61	2.400	1.200
Zambia	Eastern Africa	21.314.956	25,91	1.199	1.200
Zimbabwe	Eastern Africa	16.634.373	29,79	2.400	1.200
Botswana	Southern Africa	2.521.139	24,80	1.200	1.200
Lesotho	Southern Africa	2.337.423	2,69	1.200	1.200
Namibia	Southern Africa	3.030.131	12,35	1.200	1.200
South Africa	Southern Africa	64.007.187	399,04	2.390	1.600

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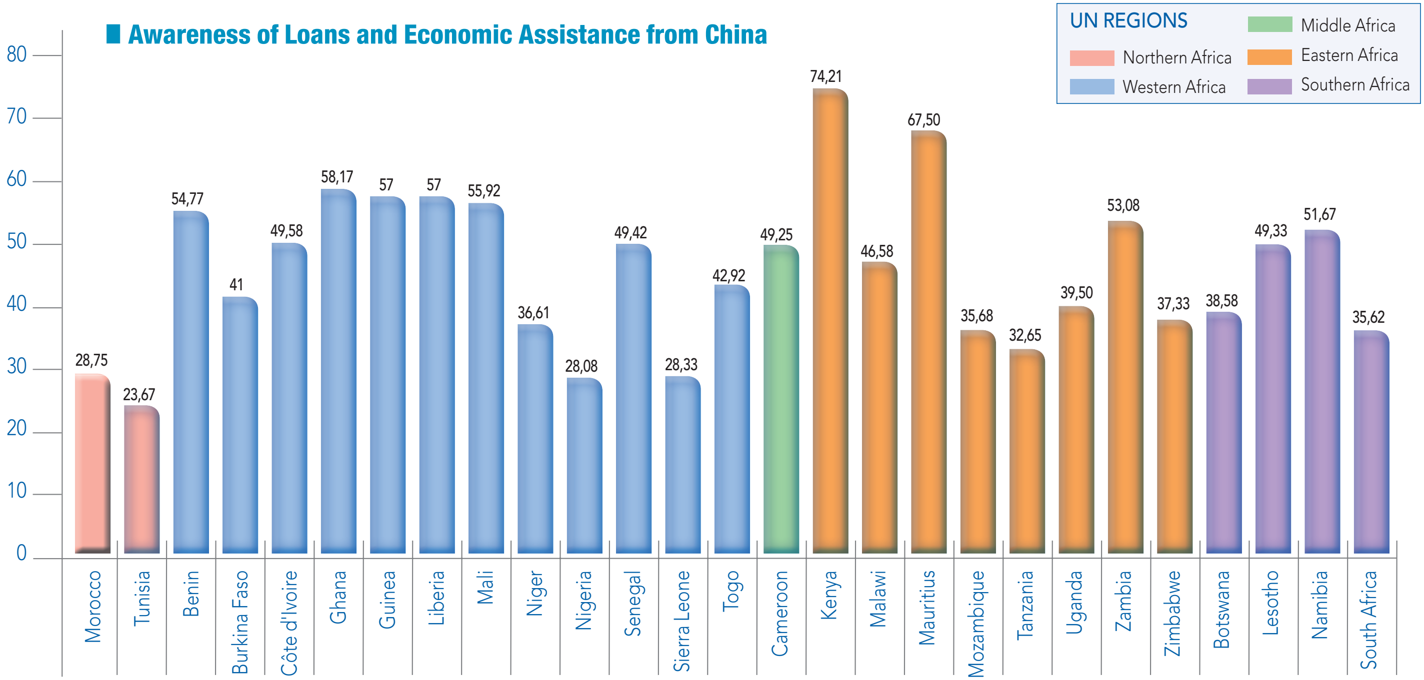
Economic Influence

Awareness of loans and economic assistance from China

The data reveals significant regional variations in the awareness of China's economic assistance across African countries. Eastern Africa exhibits a mixed trend, with the highest awareness levels in Kenya (74.21%) and Mauritius (67.5%) leading in public recognition of Chinese loans and economic aid, as well as the lower levels of awareness in Tanzania (32.65%) and Mozambique (35.68%). A high level of awareness suggests that China's financial engagements in these regions are either more visible through large-scale infrastructure projects or more widely discussed in public discourse and media. Meanwhile, Western Africa shows a more balanced medium level, with Ghana (58.17%), Guinea (57%), and Liberia (57%) displaying relatively high awareness, whereas Nigeria (28.08%) and Sierra Leone (28.33%) report relatively lower levels. Given Nigeria's large economy and frequent foreign investments, the relatively low awareness suggests that China's economic role may be overshadowed by other international financial partners.

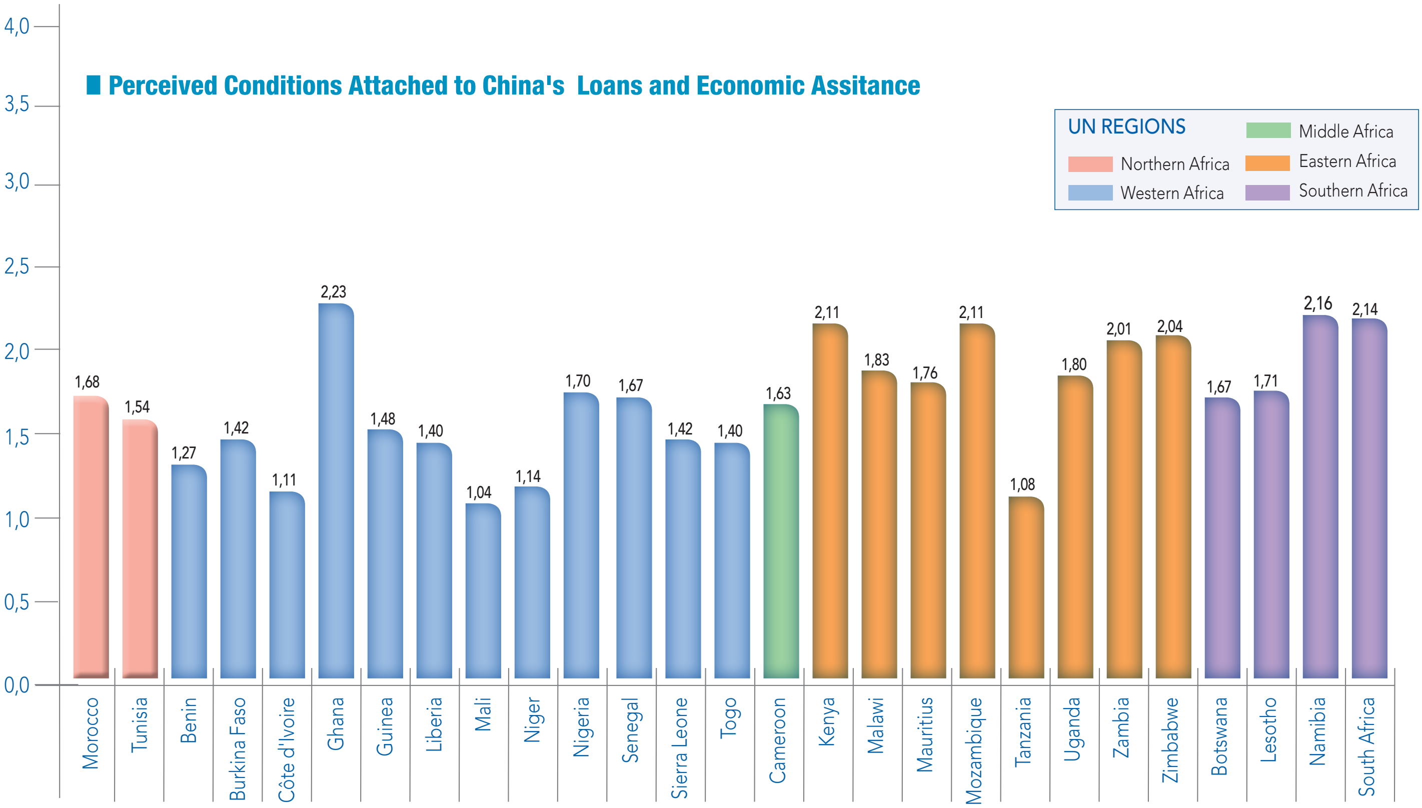
On the other hand, Northern Africa (Morocco: 28.75%, Tunisia: 23.67%) consistently records the lowest awareness levels, which may be attributed to stronger financial ties with Western and Middle Eastern nations, reducing the visibility of Chinese assistance in these economies. Southern and Middle Africa fall into a moderate awareness range, with Namibia (51.67%) and Cameroon (49.25%) reporting relatively higher recognition, whereas South Africa (35.62%) and Botswana (38.58%) have lower awareness despite being among the continent's leading economies. The overall trend suggests that China's economic presence is more widely acknowledged in countries where infrastructure development and bilateral cooperation are more prominent, while nations with more diversified economic partnerships may perceive China's influence as less dominant. These insights could help policymakers of both Chinese and local governments understand how China's engagement is perceived differently across Africa, shaping future economic diplomacy and investment strategies.



Conditions attached to China's loans and economic assistance

The data suggests that, overall, China's loans and economic assistance are perceived as having relatively fewer attached conditions compared to those from other international lenders. The scale ranges from 0 (indicating no or minimal conditions compared to other international lenders) to 4 (indicating significantly more conditions compared to other international lenders). Most countries report mean values between 1.0 and 2.0, indicating that while some conditions exist, they are generally considered less stringent than those imposed by other countries, financial institutions, or multilateral organizations. Notably, Eastern and Southern African countries tend to perceive more conditions attached, with Kenya (2.11), Namibia (2.16), and South Africa (2.14) scoring the highest. This could be attributed to greater scrutiny or awareness of loan agreements in these nations, possibly due to larger-scale infrastructure projects that come with specific contractual obligations.

In contrast, Western African nations generally report lower values, with Côte d'Ivoire (1.11), Mali (1.04), and Niger (1.14) suggesting that China's economic assistance in this region is viewed as being less conditional, with one exceptional case of Ghana (2.23). This aligns with China's broader engagement strategy in Africa, which often emphasizes infrastructure development with fewer governance or policy-related stipulations. The low scores across the board reinforce the perception that China offers a more flexible financial alternative to traditional Western lenders, who typically require reforms related to governance, transparency, or economic policies. However, the slight regional variations indicate that perceptions of China's loan conditions may be influenced by economic policies, media narratives, or past lending experiences in each country.



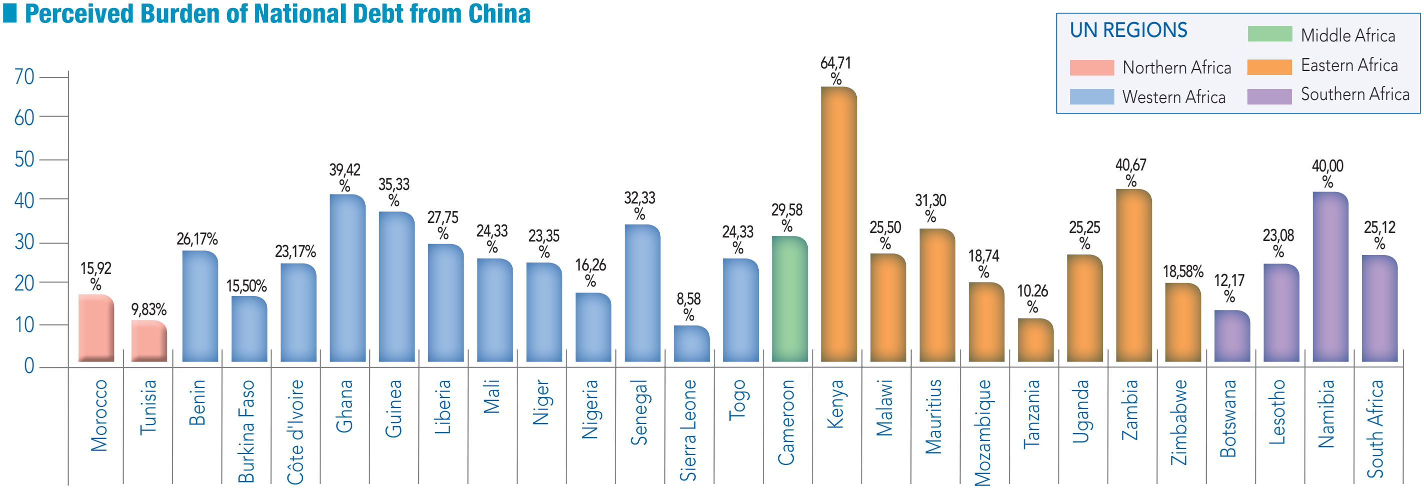
Perceived burden of national debt from China

The data reveals significant variation in public perception regarding whether their country has borrowed "too much" from China. Countries in Eastern and Southern Africa, such as Kenya (64.71%), Namibia (40.00%), and Zambia (40.67%), exhibit relatively high levels of concern about debt accumulation. This suggests that China's financial presence is more visible in these regions, potentially due to a more substantial reliance on Chinese loans. Notably, Kenya has the highest percentage of respondents expressing concern, which may reflect public discourse surrounding debt sustainability and economic dependence.

Conversely, Northern and Western African nations, including Tunisia (9.83%), Morocco (15.92%), Côte d'Ivoire (23.17%), and Mali (24.33%), report much lower levels of perceived debt burden. This could indicate that China's financial footprint in these regions is either less prominent or perceived as more manageable compared to other international lenders. Additionally, countries with diversified borrowing portfolios, such as Nigeria (16.26%) and South Africa (25.12%), show relatively moderate concern, suggesting that China's loans are one of many sources of external financing rather than a dominant financial influence. The overall trend suggests that perceptions of debt burden are not solely driven by economic data but also by media narratives, political discourse, and the visibility of Chinese-funded projects in each country.

Overall, China's economic footprint in Africa has grown substantially, driven by large-scale infrastructure investments, financial assistance, and deepening trade relations. However, the awareness, perceptions, and concerns regarding China's role vary significantly across regions. The awareness of Chinese loans and economic assistance is highest in Eastern and Western Africa, with Kenya (74.21%), Ghana (58.17%), and Guinea (57%) leading in public recognition. This suggests that these countries are either major recipients of Chinese funding for infrastructure projects or have high media coverage and public discourse surrounding China's financial presence. In contrast, Northern African countries like Morocco (28.75%) and Tunisia (23.67%) exhibit the lowest awareness, likely due to historical economic ties with Europe and the Middle East, which may overshadow China's influence. Despite high awareness in some regions, China's loans are generally perceived as having fewer attached conditions compared to those from financial institutions or other countries. Countries such as Mali (1.04), Niger (1.14), and Côte d'Ivoire (1.11) show particularly low levels of perceived loan conditions, aligning with China's broader engagement strategy of offering less restrictive financial packages focused on infrastructure and economic development. However, Kenya (2.11), Namibia (2.16), and South Africa (2.14) report slightly higher perceptions of conditions. Lastly, public concerns over national debt levels related to Chinese borrowing show stark regional contrasts. Kenya (64.71%) and Zambia (40.67%) exhibit the highest levels of concern, likely due to substantial reliance on Chinese credit. On the other hand, Northern and Western African countries, including Tunisia (9.83%) and Morocco (15.92%), report much lower concerns, suggesting that China's loans are either less prominent or perceived as manageable within a diversified financial portfolio. Interestingly, countries like Nigeria (16.26%) and South Africa (25.12%), despite their economic significance, show moderate concern—indicating that Chinese financing in these nations is seen as one component of a broader financial landscape rather than a dominant influence.

Perceived Burden of National Debt from China



2 Economic Influence and Public Image

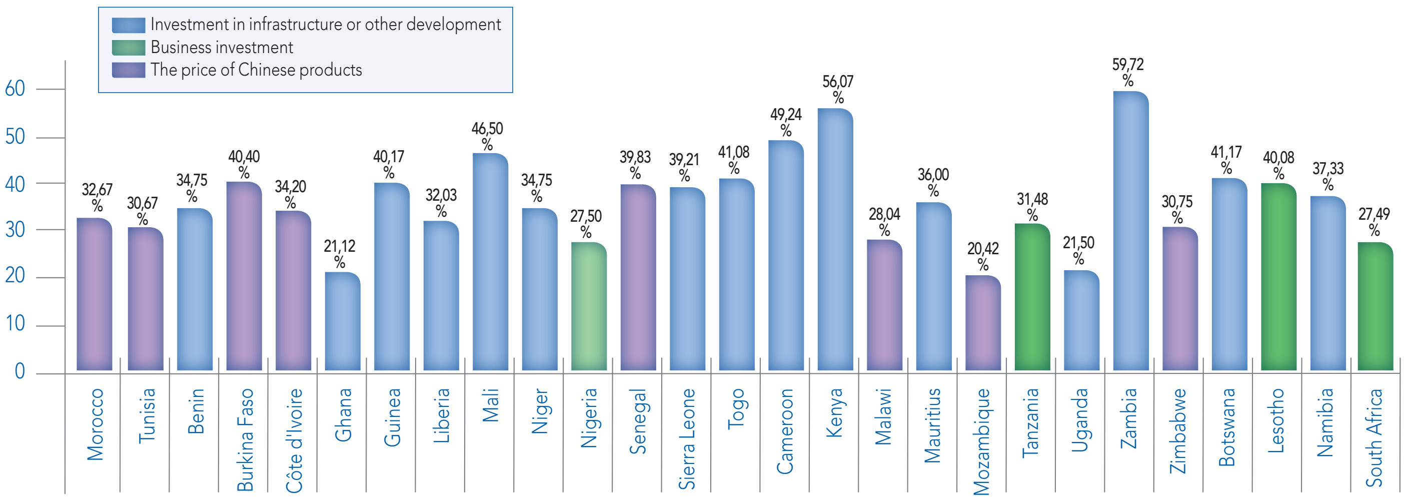
Top factors shaping China’s positive image

The data suggests that China's investment in infrastructure and development, business investment, and the price of Chinese products are the primary drivers of China's positive image across African nations, compared to other factors such as China’s support in international affairs, China’s policy of non-interference in the internal affairs of African countries, and Chinese people, culture and language. This trend highlights China’s economic engagement as the dominant factor influencing public perceptions rather than diplomatic or cultural elements. Infrastructure investment, in particular, is the most cited factor in many countries, demonstrating that China’s extensive financing of roads, bridges, railways, and energy projects has left a tangible impact on African economies. The high ranking of business investment further underscores China’s role as a key economic partner in trade, manufacturing, and employment generation, while the affordability of Chinese products reinforces the perception that China provides accessible consumer goods that meet the needs of local populations.

The regional breakdown reveals interesting variations in how these economic factors shape China's image across Africa. In Western and Eastern Africa, infrastructure investment consistently emerges as the leading factor, reflecting the high volume of Chinese-funded megaprojects in countries such as Kenya, Zambia and Mali. This suggests that regions with major Belt and Road Initiative (BRI) projects or large-scale Chinese investments tend to view China’s role more favorably through the lens of infrastructure development. Meanwhile, in Northern Africa, the price of Chinese products appears to be a more significant factor, which could indicate that trade and consumer markets play a larger role in shaping public perception than direct investment. The relatively lower influence of diplomatic factors, such as China’s non-interference policy or support in international affairs, suggests that Africa’s perception of China is primarily driven by economic benefits.

These findings carry important implications. China’s positive image in Africa is largely shaped by tangible economic contributions, indicating that continued investment in infrastructure, trade, and business partnerships will be key to sustaining and enhancing its influence. However, the reliance on economic factors also presents risks—if China’s investment slows, debt burdens increase, or competition from other economic partners rises, public sentiment could shift. Furthermore, regional variations highlight the need for China to tailor its engagement strategies based on local economic needs, ensuring that its investments continue to align with the priorities of African nations. As Africa’s economic landscape evolves, China’s ability to balance infrastructure-led engagement with sustainable trade and investment policies will determine the long-term strength of its economic partnerships on the continent.

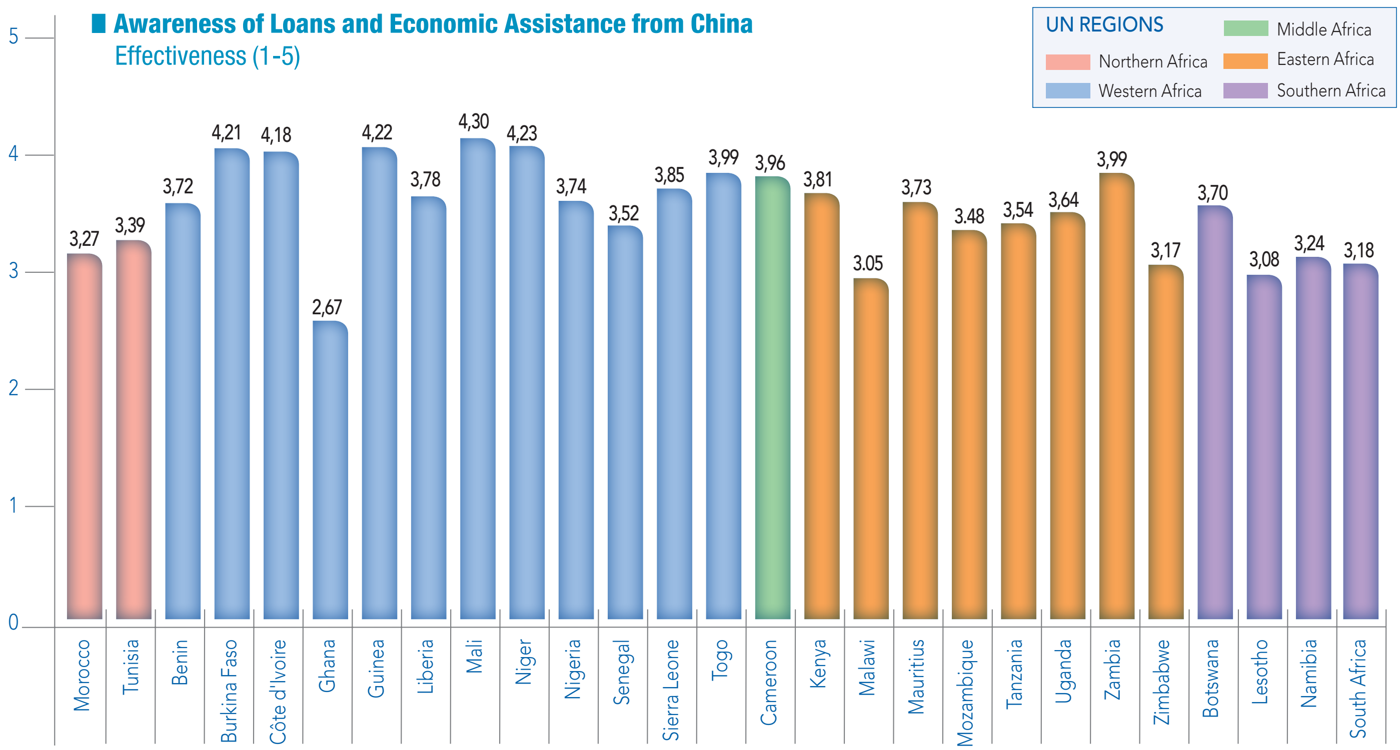
Top Factors Shoping China's Positive Image



Perceived effectiveness of China's economic assistance

The data presents a largely positive assessment of China's economic assistance in Africa, indicating African nations evaluating the effectiveness of China's economic development assistance in meeting their country's needs from 1= not effective at all to 5 = very effective. Notably, Western African nations such as Burkina Faso (4.21) and Côte d'Ivoire (4.18) record some of the highest scores, reflecting a strong appreciation for China's role in infrastructure development, trade, and investment. These high ratings suggest that China's economic engagement in the region is meeting critical needs, particularly in sectors where development financing has been historically limited. However, Ghana (2.67) shows a relatively low rating on this regard. Similarly, in Eastern Africa, where major Belt and Road Initiative (BRI) projects are underway, the effectiveness of China's assistance is also rated favorably, highlighting the impact of modernized transportation networks, energy infrastructure, and industrial investments. Middle Africa's Cameroon (3.96) shows a solid approval level, further reinforcing the notion that China's economic partnerships are seen as a vital force for progress across different African regions.

Regional trends further indicate that China's economic involvement has been well-received, particularly in nations where infrastructure gaps have been a major barrier to economic growth. The strong approval ratings in many countries suggest that China's investments are making tangible improvements in connectivity, energy access, and job creation, strengthening long-term economic prospects. Even in Southern Africa, where nations like Botswana and South Africa have more diversified economies, the steady approval of China's assistance suggests that Chinese investments remain a valuable component of their development landscape. This widespread positive reception underscores China's strategic role as a trusted economic partner, demonstrating that its development-focused, investment-driven approach is seen as effective in addressing national priorities and supporting Africa's long-term economic aspirations.



3
Perceptual Shifts from 2016 to 2023

The dynamic influence of Chinese economic activities (2016 vs. 2023)

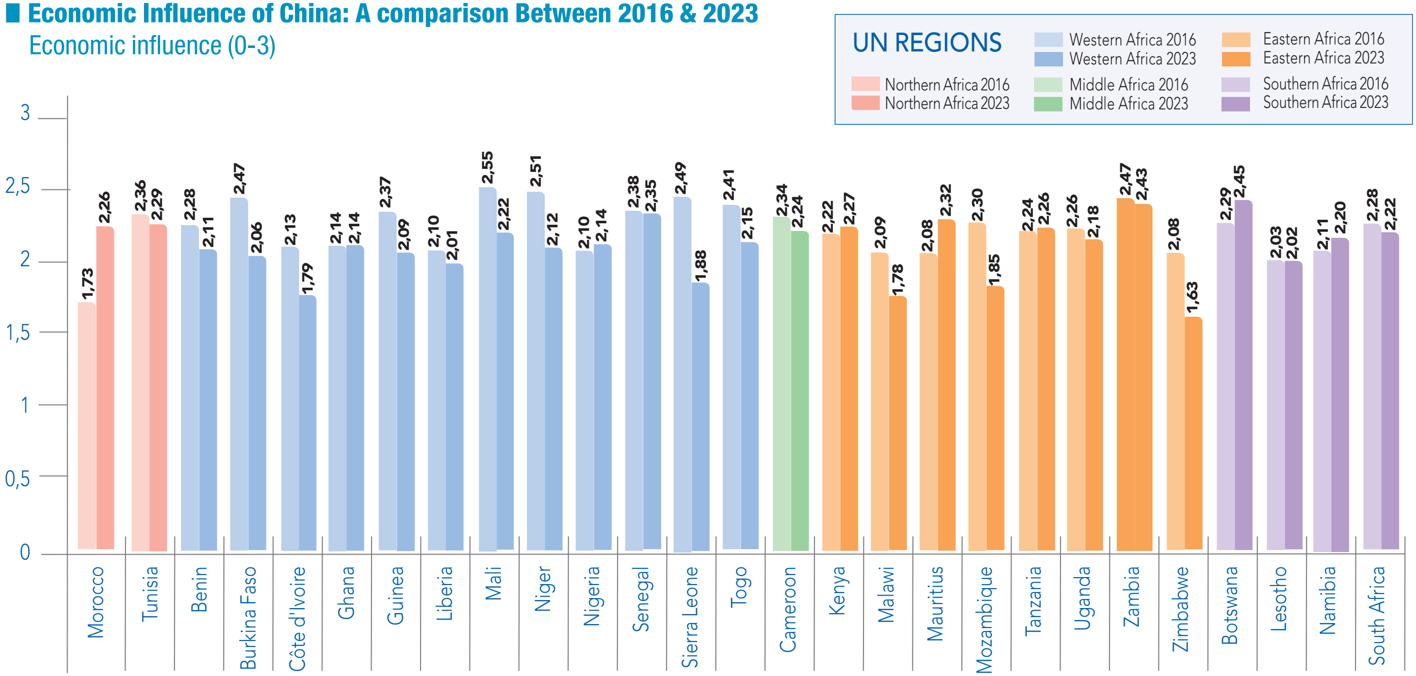
The data shows regional variations in how China's economic influence has evolved across Africa from 2016 to 2023. Western and Eastern African countries, such as Kenya, Mauritius and Nigeria, exhibit increases in influence, suggesting a growing role of China in these economies. This may be linked to continued infrastructure development, trade expansion, and investment in key sectors such as energy, transportation, and industry. In contrast, Southern African countries such as South Africa, along with some Northern and Middle African nations like Tunisia and Cameroon, display less/stable influence levels over time. This could reflect a diversification of economic partnerships or the presence of multiple sources of foreign investment.

The data also reveals cases where China's economic influence has decreased between 2016 and 2023. In certain countries, such as Burkina Faso and Mali, the decline may indicate a shift in economic dynamics, increased diversification of foreign partnerships, or changing public perceptions of China's economic role. The decline in influence does not necessarily imply disengagement but may reflect a stabilization of China's role in economies where initial large-scale investments have already been made or where other international players have become more active. These shifts highlight the fluid nature of economic influence and the various factors that shape international economic relationships over time. The varying degrees of change across regions indicate that China's economic engagement has not been uniform but rather shaped by local economic conditions, investment priorities, and existing trade relationships.

The comparison between 2016 and 2023 suggests that China's influence has deepened in countries where investment in infrastructure and economic cooperation has been more prominent. In some nations, increasing scores may reflect a strengthened perception of China's role in economic development, particularly in regions where large-scale projects have been implemented. Meanwhile, in countries with relatively stable scores, China remains a key economic partner, though its relative influence may not have shifted as dramatically over this period. These findings highlight the complexity of China-Africa economic relations, where shifts in influence are influenced by multiple factors, including foreign direct investment, infrastructure financing, trade agreements, and national economic strategies.

Economic Influence of China: A comparison Between 2016 & 2023

Economic influence (0-3)

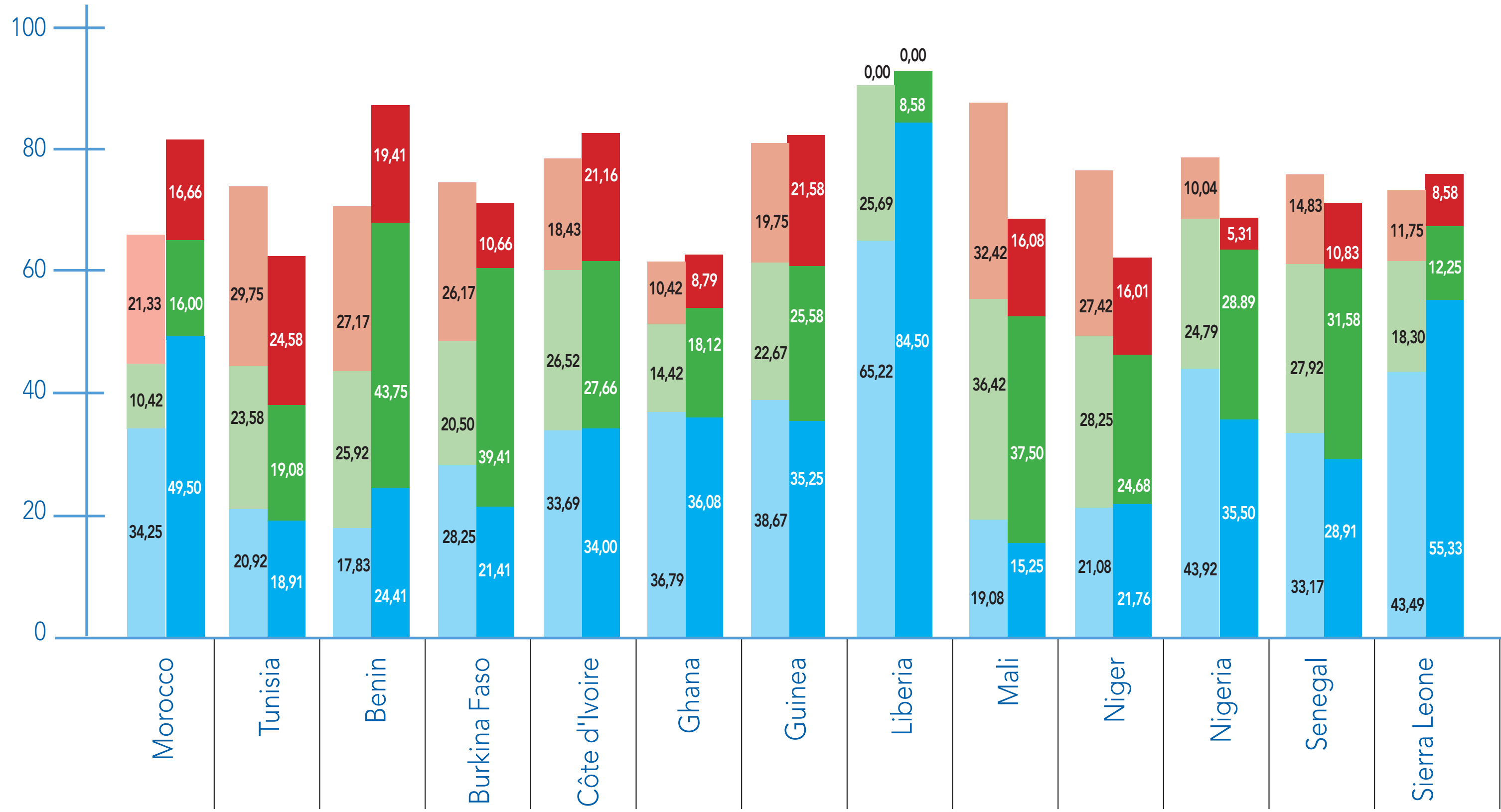


Preference for developmental models (2016 vs. 2023)

The data highlights significant shifts in African perceptions of which countries serve as ideal development models, revealing a dynamic and evolving geopolitical landscape. While China (green) has gained considerable ground in some nations, the United States (blue) has also strengthened its position in several others, indicating that economic and political shifts influence public sentiment. In countries such as Nigeria and Ghana, China's model has seen noticeable growth. Conversely, in nations such as South Africa, and Namibia, the China's influence as a development model has decreased. Meanwhile, former colonial powers (red) have largely seen their influence remain stable or decline, indicating a broader trend of African nations moving away from legacy relationships toward emerging global players.

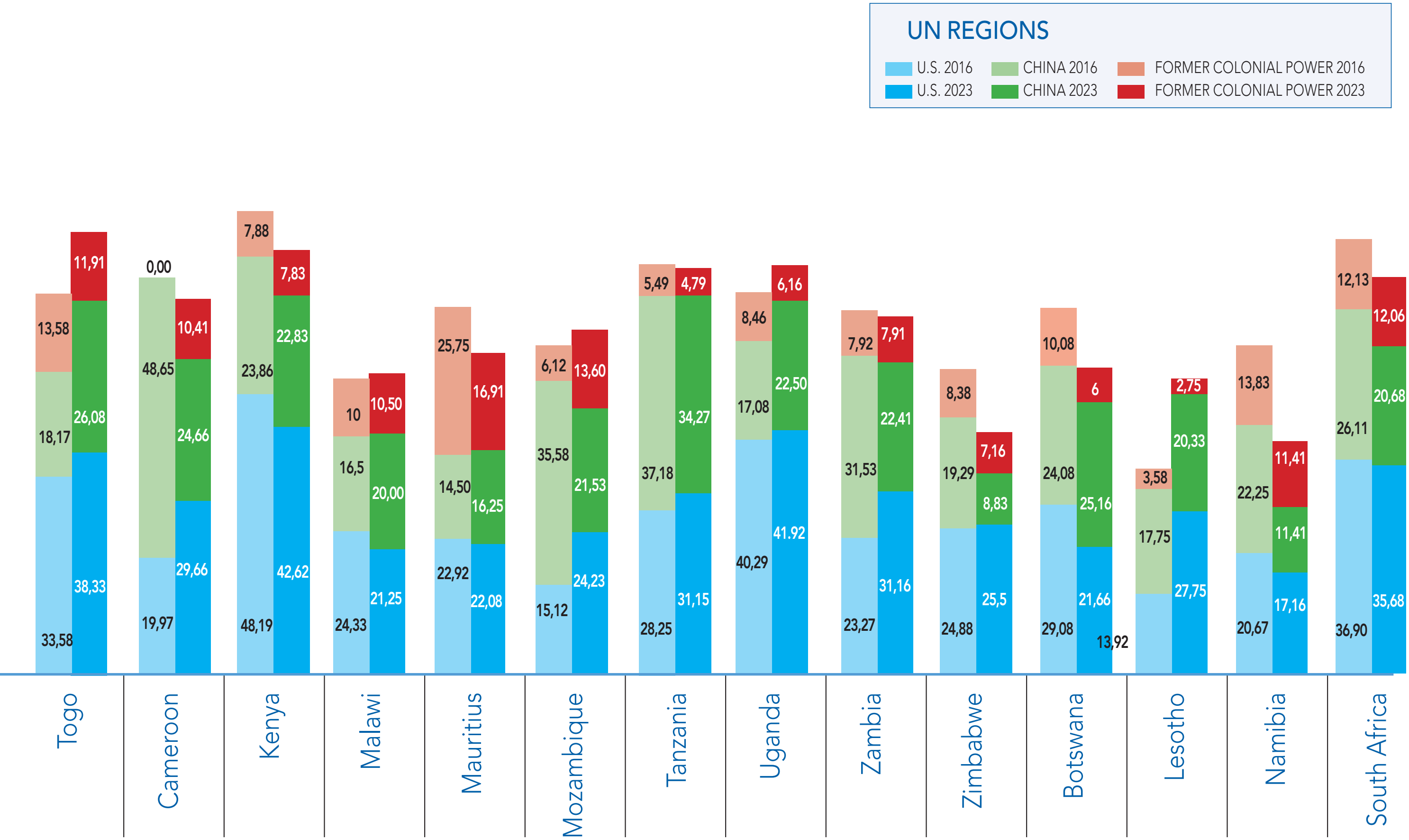
When examining individual country trends, notable shifts emerge. Benin and Burkina Faso show an increasing preference for China's model, aligning with their strong participation in the Belt and Road Initiative (BRI), Chinese-built infrastructure projects, and trade agreements.

Developmental Model / Preference Percentage %



This suggests that China's state-led development model, emphasizing large-scale economic projects, has resonated strongly in Western Africa. In contrast, Liberia and Morocco exhibit a shift toward the U.S., indicating a preference for Western-style governance, economic policies, and market-driven growth strategies. Moreover, regarding the former colonial power, the general preference has decreased during the period of 2016 to 2023.

These findings underscore Africa's evolving approach to global partnerships, where nations increasingly adopt a pragmatic outlook, choosing development models that align with their economic needs and governance structures. The growing influence of China in infrastructure-heavy economies demonstrates a preference for state-driven economic growth models, while the U.S. remains an attractive model for countries prioritizing technology-driven economies and higher education systems. The declining influence of former colonial powers signals Africa's ongoing geopolitical realignment, with nations actively seeking development partners that offer tangible economic and technological benefits rather than relying on historical ties. These shifts reflect Africa's agency in shaping its development trajectory, leveraging global partnerships to meet national priorities in an increasingly multipolar world.



KEY TAKEAWAYS

Regional Variation in the Awareness of China's Economic Assistance

Public awareness of China's financial presence in Africa is significant, with Eastern (e.g., Kenya) and Western African countries (e.g., Ghana) demonstrating the highest recognition of Chinese loans and economic assistance. This suggests that China's investments in infrastructure, trade, and direct financial support have become increasingly visible and integral to economic discourse across the continent. However, awareness levels remain lower in Northern Africa (e.g., Tunisia), where historical economic ties with Europe and the Middle East may influence public perception.

Perceived Loan Conditions: China vs. Other Lenders

The data indicates that China's loans are generally perceived as having fewer attached conditions compared to those from other countries and financial institutions. While some countries view China's economic assistance as flexible and easily accessible, nations with higher loan scrutiny—such as Kenya and South Africa—express a more cautious perspective, possibly due to concerns over long-term obligations or economic dependencies. Ghana shows the highest rating on this regard (Page 13), coupled with the lowest rating on the effectiveness of China's economic assistance (Page 16) among all surveyed countries, presenting a less positive perception in China's economic influence overall. These findings highlight the variability in how China's lending practices are understood and assessed across different African economies.

Debt Sustainability Concerns

The belief that a country has borrowed "too much" from China varies significantly across regions. Some nations, such as Kenya and Zambia, report high concerns over debt accumulation, likely influenced by large-scale infrastructure financing and public discourse on debt sustainability. Conversely, countries with more diversified borrowing portfolios, such as South Africa and Nigeria, express lower concern, reflecting a more balanced reliance on multiple international financial partners. This divergence suggests that public perception of debt is influenced not only by economic realities but also by media narratives and political discourse on external financing.

Factors Contributing to China's Positive Image

Among the key drivers of China's positive perception in Africa, investment in infrastructure and economic development, business investment, and affordability of Chinese products stand out as the most influential. The fact that economic factors dominate over diplomatic or cultural elements suggests that China's engagement in Africa is largely evaluated based on tangible economic contributions. However, regional differences persist, with trade and consumer markets playing a more significant role in Southern Africa, while infrastructure-led development remains the leading factor in Western and Eastern Africa. The findings regarding South Africa shows a pattern consistent with the one revealed in the IE China Center

2022-2023 report regarding the soft power of China [(4)], suggesting that the influence of China in South Africa is mainly derived from business investments and activities including those of high-tech companies.

Effectiveness of Chinese Loans in Meeting Local Developmental Needs

Public perception of the effectiveness of Chinese economic assistance is generally high across Africa, with the highest ratings in Western (e.g., Mali, Niger) and Middle Africa (e.g., Cameroon), where infrastructure financing has been more prominent. In contrast, countries with more established financial diversification, such as South Africa, exhibit more measured assessments of China's economic role. This suggests that perceptions of loan effectiveness are closely tied to the visibility of Chinese-funded projects and their direct impact on local economies.

Shifts in China's Economic Influence Between 2016 and 2023

The comparison between 2016 and 2023 reveals significant shifts in how African nations perceive China's economic influence, with some countries showing increased recognition of China's role, while others remain stable or even decline. Eastern African nations, such as Kenya and Tanzania, have demonstrated a rising influence. Morocco, a Northern African nation, shows a significant increase in the perception of economic influence of China. In contrast, Southern African countries, such as South Africa, have shown decreased economic influence from China. These trends reflect a broader reconfiguration of Africa's economic partnerships, where nations are actively reassessing their development strategies based on changing geopolitical and economic conditions.

Evolving Preferences for Development Models (2016 vs. 2023)

The analysis of which country is seen as a model for development highlights Africa's shifting global outlook from 2016 to 2023. While China has gained influence in many regions (e.g., Morocco, Benin, Togo, among others) due to its state-led economic growth model and infrastructure-driven engagement, the U.S. remains an aspirational model in many countries, such as Liberia, Mozambique, Lesotho, etc.. Meanwhile, former colonial powers have generally declined in influence, though they remain relevant in select nations due to historical trade and institutional linkages. This shift suggests that Africa's engagement with the global economy is becoming increasingly pragmatic, with countries aligning their development strategies with partners that best meet their evolving needs.

A Multipolar Economic Landscape in Africa

Overall, the findings indicate that China's role in Africa is expanding but not in isolation, as the U.S. and other global players continue to compete for economic influence. While China's influence has grown substantially in infrastructure and trade, the U.S. maintains strong partnerships and continue to shape policy decisions. This underscores Africa's increasing agency in determining its economic partnerships, selecting models and financial allies based on national priorities rather than exclusive alignment with any single global power.

4. Fuel the Soft Power: The Role of High Tech Companies in the Soft Power Rivalry between China and United States. IE China Center.

China´s economic approach to soft power

JOSÉ FÉLIX VALDIVIESO
Chairman of IE China Obervatory

Joseph Nye, who passed away earlier this year, rightly deserves recognition—not only as a scholar but also as the originator of the now-classic terms soft, hard, and smart power. These concepts have become pillars of international relations and are routinely referenced by policymakers around the world. For any academic, there is no greater legacy than seeing one's ideas actively shape global affairs.

Nye defined hard power as a country's ability to influence others through coercion—typically by military force or economic pressure—while soft power refers to the capacity to shape preferences through attraction, using tools such as culture, values, diplomacy, and institutions. Smart power, in turn, combines elements of both.

Over the past two decades, Nye's framework has been widely adopted by leaders and governments across the globe. French President Emmanuel Macron, for example, explicitly invokes soft power in shaping foreign policy priorities—particularly in Africa, where France seeks to maintain influence through culture, education, and development partnerships. Rather than relying on military might, he said during a visit to Congo in July 2022 that his approach would be based on soft power(1).

China, however, has taken Nye's ideas in a new direction. It has reinterpreted soft power to include economic tools—such as infrastructure investment, trade, and development finance— as key levers of attraction and influence. While Nye originally placed economic inducements in the realm of hard power when used to pressure or coerce, China integrates them into its soft power strategy. Nowhere is this reinterpretation more visible than in Africa, which has become a showcase for Beijing's approach to global engagement through large-scale projects, political ties, and cultural exchanges.

Soft power rides a Harley!

In the preface to his book, The Future of Power(2), Nye reconfirmed the practical relevance of his ideas about power, quoting Hilary Clinton when she was Secretary of State during Obama's first term. «America cannot solve the most pressing problems on our own, and the world cannot solve them without America. We must use what has been called "smart power", the full range of tools at our disposal.» (3) For Nye, «Smart power is the combination of the hard power of coercion and payment with the soft power of persuasion and attraction.»(4)

However, these concepts suffer from a certain Americanism, they ride a Harley, as could not be otherwise, given that they were devised to respond to the problems of US foreign policy. Moreover, we should remember that Nye was both a professor and later dean at Harvard's Kennedy School, in addition to having held prominent public positions in the Clinton and Obama administrations.

But this Americanism did not prevent Chinese scholars from appropriating the concept and trying to import it into China, along with all kinds of Western, mainly US, technology. The first to do so was Wáng

Hùníng, one of the most fascinating scholars and politicians in China today. Wáng collected his ideas in the article Culture as national power: soft power, published in 1993.[5] In 1991, he had published America vs. America, which would bring him to prominence. In the 1990s, Wáng was hired by Jiãng Zémín.

In the above-mentioned article, Wáng commented that «if a country has an admirable culture and ideological system, other countries will tend to follow it.... And it won't have to use its hard power, which is expensive and inefficient. » As early as 2007, the founder of Singapore, Lee Kuan Yew, pointed out that although the Chinese did not coin the term soft power, they have exercised it masterfully.[6]

China's soft power kung fu isn't new

In reality, the Chinese have been practicing soft power for millennia: Confucian virtuous idealism is based on moral leadership and mutual respect, which also allows states to exercise leadership over other states. His disciple, Mencius, developed these ideas further, arguing that righteous rulers can easily eliminate their competitors, turning them into allies.[7]

«If you don't achieve your goals, then look inside yourself. When you are at one with yourself, the whole world turns to you», advises Mencius.[8]

The same could be said of the philosophy of non-action, the famous wúwéi, which arguably falls within the scope of soft power, and that has been the law for Chinese Taoists since time immemorial.

In the more recent past, Chairman Máo and his eternal prime minister, Zhõu Ēnlái, supported the non-aligned countries and the anti-colonialist movements of the 1960s, which cannot be seen as anything but another form of soft power.

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Sailing into choppy waters

Despite these similar approaches, soft power as such was not adopted by the Chinese rulers who came after Máo. Dèng Xiâopíng made it clear he wanted to introduce the market economy.

Simultaneously, he believed that tight political control of the party was crucial to bring about the changes China needed, so he refused to buy into any other kind of Western ideology that could contaminate the masses. Soft power, among others, was one of them.

Riding the current

The final decade of the 20th century set the stage for soft power to thrive. First came the 1991 collapse of the Soviet Union—a regime that never grasped soft power—which deeply alarmed China's leaders.

Then, in 1993, Jiãng Zémín succeeded Dèng Xiâopíng, who had reestablished U.S. ties in 1979 and championed reform. Before retiring, Dèng hoped southern Guângdõng would match the four Asian tigers within 20 years—a goal that was ultimately exceeded.

Smile Diplomacy

Between 1994 and 2000, the term soft power (ruânshílì 软实力) appeared in just 11 Chinese academic articles. By 2005–2007, that number had jumped to 416. [9] Its first official political use came in 2007, when President Hú Jîntão emphasized the need to strengthen China's cultural soft power (Wénhuà ruânshílì) at the 17th Party Congress. [10]

In practice, China had already begun exercising soft power. The Confucius Institutes launched in 2004, followed by teacher and doctor missions abroad, financial aid projects in the Global South, and

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scholarship programs for international students. Beijing also promoted multilateral initiatives such as the Shanghai Cooperation Organization and the China–ASEAN Free Trade Area.

China has since become the second-largest contributor to the UN budget and leads in peacekeeping deployments, with over 2,200 personnel, according to China Daily.[11]

In 2009, Hú launched the Great External Broadcasting Strategy—a €8 billion campaign to promote China's voice in global media.

President Xí Jìnpíng has pushed soft power even further, integrating it into both foreign and domestic agendas. As Maria Repnikova of Georgia State University notes, soft power now features prominently in Chinese Communist Party discourse.[12]

Soft power rides a BYD!

The concept of soft power has traveled to China—and transformed along the way. Some argue it has been enriched with Chinese characteristics; others believe it has strayed from Joseph Nye's original idea.

Originally, Nye framed soft power as a foreign policy tool for the U.S. to retain influence in the post–Cold War world. In contrast, Chinese policymakers view soft power as equally applicable at home. Leading Chinese thinkers see culture as social glue, with the Communist Party as the guardian of Chinese civilization. Maintaining culture means maintaining stability—and with it, the Party's legitimacy.

This cultural mission often walks hand in hand with nationalism, framing belonging to China's millenary civilization as both a privilege and a responsibility. In this context, the boundaries between soft and hard power blur. Economics, considered hard power in Nye's framework, is central to China's soft power strategy.

Unlike the Western emphasis on attraction through values or media, China prioritizes economic growth and government leadership. As scholar Maria Repnikova notes, Chinese soft power discourse—explicitly or not—always leans on the country's economic success. This economic model aligns with Beijing's global initiatives: infrastructure loans, the Belt and Road Initiative, and institutions like the AIIB.

Even ChatGPT points to China's economic muscle as the core of its soft power. But for Nye, that's not soft power—unless, for instance, loans are interest-free. Otherwise, they can veer into coercion, undermining the concept itself.

This tension is well captured by author Bái Yánsõng, who writes: "Some may not like China, but many admire the Chinese people—and everyone likes the yuan". It's a reminder that admiration and economic dependency aren't always the same.

This is the backdrop for our report: China's Economic Influence in Africa: A Data-Driven Analysis. Whether China's approach ultimately redefines global soft power—or undermines it—remains to be seen.

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(1) Cf. **Macron cherche à réveiller l'influence française en Afrique**, Challenges, July 26, 2022.

(2) Cf. The Future of Power. Joseph S. Nye. Public Affairs. New York. 2011. p. IX

(3) Cf. Transcript of Clinton's confirmation hearing, January 13, 2009, https://www.npr.org/templates/story/story.php?storyId=99290981, quoted in The Future of Power. Joseph S. Nye. Public Affairs. New York. 2011, preface, p. IX.

(4) Ibid. p. XIII.

(5) Cf. Culture as national power: soft power, Journal of Fudan University, March, 1993.

(6) Cf. **Contest for influence in Asia-Pacific region**, Forbes Magazine, June 2007.

(7) Cf. The dragon's silver tongue. Chinese power in the age of Xi Jinping. Copyright 2022 Taylor D. Beith. p. 18.

(8) Cf. The works of Mencius. James Legge. Book 4, Part 1. New York. Dover Publications, Inc. 2011.

(9) Soft Power with Chinese Characteristics. China´s campaign for Hearts and Minds. Edited by Kingley Edney, Stanley Rosen and Ying Zhu. Routledge. London & New York. 2020. p.2.

(10) Cf. Chinese soft power. Maria Repnikova. Cambridge University Press. United Kingdom. 2022. p. 2.

(11) Cf. China pays all current UN peacekeeping assessments. China Daily. November 24, 2022.

(12) Cf. Opus. cit. p. 2.

China's Economic Influence in Africa: A Data-Driven Analysis

African perspectives on the global power scramble for Africa

JOSEPH ASUNKA
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Research Associate at Afrobarometer

In a fast-changing geopolitical world order, Africa continues to be seen as a critical partner by international actors, not least because of its youthful population and abundance of strategic mineral resources (Zabelin, 2023). As global powers such as China, the United States, the European Union, South Korea, Russia and others jockey for influence and access, many African countries are adopting a stance of strategic non-alignment – maintaining pragmatic relations with a range of external partners to safeguard their autonomy and agency in international relations (Sidiropoulos & Carvalho, 2023). As a result, geopolitical competition on the continent has become increasingly fierce and multifaceted.

Over the past few decades, China has emerged as the continent's largest bilateral trading partner and creditor, providing a critical source of finance for Africa's infrastructure development (Munyati, 2024). Its ties with African nations are institutionalised through the triennial Forum on China-Africa Cooperation (Van Staden, 2024). These fora serve as an opportunity for China to strengthen its economic and political alliances on the continent. By invoking recurring themes in its official narrative, such as "common struggles" and a "shared history" of resistance to Western domination, China has sought to reinforce the legitimacy of the Sino-African partnership in support of its broader ambition to reshape global governance norms and institutions (Neema, 2024).

China's expanding economic and political influence in Africa may have prompted several counter-initiatives, including high-level summits and programmes such as the Partnership for Global Infrastructure and Investment, led by the United States and G7, and the EU's Global Gateway (Van Staden, 2022; Amighini, 2024). These efforts aim to reframe Western engagement with Africa on more equitable terms, presenting the United States and Europe as alternative partners by emphasising transparency, sustainability, and high-quality infrastructure, areas where China has faced frequent criticism (Van Staden, 2022; Amighini, 2024). They also seek to expand Western access to Africa's critical mineral supply chains and reduce their own dependence on China, which controls more than 60% of global production and remains Africa's largest buyer (Glaser & Wulf, 2023; Vandome, 2024).

As Africa's role in global power competition and its choice of international partnerships expand, the continent must carefully balance development priorities with the protection of its interests and sovereignty. Understanding how ordinary African citizens perceive foreign powers should inform this process. The latest round of Afrobarometer surveys

(Round 10), which is expected to be completed by July 2025, provides valuable insight into public perceptions of the economic and political influence of the major global powers on the continent. Across the 29 countries where Round 10 surveys have been completed, a clear majority (60%) of Africans say that China's economic and political influence has been positive. A little more than half (53%) and just under half (49%) hold the same view of U.S. and EU influence, respectively, while Russia sits at 36% (Figure 1).

FIGURE 1: Rating of international actor influence on country | 29 African countries | 2024/2025

Respondents were asked: Do you think that the economic and political influence of each of the following countries or organisations on [your country] is mostly positive, mostly negative, or haven't you heard enough to say?

While China and the United States continue to enjoy majority positive ratings of their economic and political influence on the continent, the data show that people's views have shifted significantly over time (Figure 2). Across 25 of the 29 countries where we have data over time, favourable ratings of the economic and political influence of both powers declined in several countries, but more so for the United States than for China. On average, between 2019 and 2024, positive ratings of China's influence decreased by only 2 percentage points, while the United States saw an 8-percentage-point drop. At the country level, positive views on China increased significantly (by more than 3 percentage points) in Lesotho, Tunisia, Namibia, Côte d'Ivoire, and Cameroon and declined by double digits in Botswana, Morocco, Benin, Ghana, Tanzania, and Guinea. On the other hand, the United States recorded significant increases in positive ratings in Lesotho and Côte d'Ivoire and significant declines in 16 counties, led by Morocco, Mali, Benin, Botswana, Tanzania, Zambia, and Guinea.

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FIGURE 2: Change in positive ratings of Chinese and U.S. influence | 25 African countries | 2019-2024

Respondents were asked: Do you think that the economic and political influence of each of the following countries or organisations on [your country] is mostly positive, mostly negative, or haven't you heard enough to say? (Figure shows percentage-point change between 2019 and 2024 in "somewhat positive" or "very positive.")

Importantly, few Africans see Chinese and U.S. influence as negative (19% each). Moreover, the over-time changes shown in Figure 2 suggest that with a few exceptions, countries where positive perceptions of U.S. influence went up or down have recorded similar changes in positive perceptions of Chinese influence. In other words, China and the United States tend to rise and fall together in the eyes of Africans. This aligns with previous findings that people who welcome the influence of China are more likely to welcome U.S. influence as well

60%

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(Singh, Sanny, & Gyimah-Boadi, 2020), suggesting that for many Africans, U.S.-China competition isn't an either-or proposition but a win-win.

As the global competition for influence intensifies – particularly amid the worldwide pursuit of critical minerals and alternative energy sources and the new U.S. administration's increasingly confrontational stance on China to advance a protectionist agenda – Africa's geopolitical importance will only continue to grow. While China currently enjoys stronger positive perceptions across much of the continent, largely due to the visible outcomes of its infrastructure-led engagement, neither China nor the United States commands unqualified support. Declining public approval of the influence of both powers in several countries over time reflects a growing unease with external powers. Those seeking to gain leverage and influence on the continent must realise that ordinary Africans wish for mutually beneficial engagements.

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Can China Sustain its Soft Power in Africa?

ENIOLA HARRISON
Director of the IE Africa Program

Arguably, the primary driver of China's positive image across Africa over the last two decades has been its substantial investment in infrastructure, during which it has poured billions of dollars into building bridges, roads, power plants and ports. The African Development Bank says the continent requires an estimated $130 and $170 billion for infrastructure development annually, resulting in a funding deficit of $68 to $108 billion. To bridge this funding gap, African governments have increasingly relied on China, which, through its Belt and Road Initiative, has emerged as Africa's largest infrastructure financier. China lends twice as much for public-private infrastructure projects in sub-Saharan Africa as the United States, Germany, Japan and France's development finance institutions combined (Lee and Gonzalez, 2022).

This infrastructure diplomacy has bolstered China's image in many parts of the continent. However, as findings from our IE China Observatory report, this is largely based on economic and transactional factors, rather than rooted in cultural or diplomatic affinity. As China's economic outlook becomes more constrained due to domestic slowdown, the effects of tariff wars with the United States and increasing African concerns around unsustainable debt levels, the question arises: is this model sustainable for long-term influence in Africa?

A New Narrative on China-Africa Cooperation

At the ninth Forum on China-Africa Cooperation (FOCAC) summit in 2024, China appeared to recognize this challenge and sought to articulate a new narrative about its partnership with Africa. Bringing together 53 high-level delegations from the continent, President Xi Jinping emphasized the vision of "an all-weather China-Africa community with a shared future for the new era", signaling a desire to evolve the relationship beyond infrastructure diplomacy.

This rhetoric resonated with a continent increasingly disillusioned with an international order that often seems to serve the interests of powerful governments in the North. For many African countries, China's narrative of South-South collaboration and non-interference is appealing. Yet, even as China positions itself as the continent's strategic ally in a multipolar world, many African governments remain cautious. Rather than aligning with a binary West-versus-China paradigm, they are seeking to rebalance their relationship with China, asserting greater agency and focusing on national interests.

Africa's Agency and the Need for a Continental China Strategy

What is needed, however, is a unified African strategy towards China. So far, most of China's engagement across the continent is bilateral, negotiated on a country by country basis. As the African Union (AU) advances Agenda 2063, and the African Continental Free Trade Area (AfCFTA) gains traction, there has never been a better time for a coordinated continental wide approach to Africa-China relations.

The continent needs to articulate and advance its own agenda, setting the terms of its engagement with China—not only in the area of infrastructure development, but in enhanced value addition within the continent's supply chain. Currently the balance of trade is highly skewed: African countries largely export raw minerals and agricultural goods to China, while importing finished goods. This perpetuates the structural imbalance the continent has experienced in its engagements with other development partners.

To truly benefit from its engagement with China, Africa needs more market access, fairer trade terms and a focus on boosting industrial capacity. Investments should be directed to creating high value jobs for the hundreds of millions of Africans entering the job market in the coming decades. There needs to be greater alignment between China's Belt and Road Initiative (BRI) projects and the AU's Agenda 2063 priorities, such as the green transition, digital transformation and human capital development.

What is future of China-Africa relations?

As African leaders and policymakers grow more confident in asserting their agency and shaping their economic partnerships in a multipolar world, the success of China's engagement in Africa will need to depend less on infrastructure diplomacy and more on the depth and quality of its partnership with African countries.

China must complement its economic initiatives with greater transparency, innovative models of debt sustainability, meaningful political dialogue and respect for Africa's own development goals.

China and Africa: from transactional relationship to a strategic partnership

ESTELA LI
President of China Club Spain

"Africa's youth —expected to make up over half of the global population growth by 2050— are better informed and more demanding. They are calling for jobs, good governance, environmental sustainability, and a fairer world economic order. For many of them, the traditional narrative of China as a development supporter no longer suffices.

Over the past two decades, China has become one of Africa's leading and most visible partners. From financing railways and ports to building roads and hospitals, Chinese investments have transformed the physical and economic landscape of many African nations. Trade between China and Africa has grown exponentially, and China is now the continent's largest trading partner, reaching a record $295 billion in 2024. For many Africans, especially those in countries that have benefited from infrastructure and development financing, China's presence has generally been viewed positively.

However, this sentiment is evolving. New economic, and social dynamics are reshaping how China-Africa cooperation is perceived and what African nations now expect from this relationship. Western governments, international media and think tanks have stepped up scrutiny of China's footprint on the continent, often highlighting concerns over debt sustaina ility, transparency, environmental impact, as well as political influence. This has contributed to a polarized narrative that presents China as either a benevolent partner or a strategic manipulator. While these characterizations are often simplistic, they have nevertheless affected how Africa's policymakers and civil society interpret China's role.

At the same time, Africa is changing. A wave of political transitions, increasing democratic engagement, and the emergence of a young, connected, and vocal generation are altering the internal dynamics of many countries. Africa's youth—expected to make up over half of the global population growth by 2050—are better informed and more demanding. They are calling for jobs, good governance, environmental sustainability, and a fairer world economic order. For many of them, the traditional narrative of China as a development supporter no longer suffices.

These shifting attitudes are also rooted in Africa's historical experiences. The legacy of colonialism and economic exploitation has made many African societies deeply sensitive to perceived power imbalances. While China has emphasized its identity as a fellow developing country and champion of South-South cooperation, its rising economic leverage in Africa has sometimes created tensions.

In countries where Chinese loans are linked to large-scale infrastructure projects, concerns about debt and sovereignty have surfaced. In sectors such as mining and construction, there have been criticisms of environmental degradation, disadvantaged labor standards, and limited technology transfer. These are not universal truths, and there are many success stories of collaboration and capacity building, but they contribute to a more complex and sometimes skeptical perception of China's role. At the same time, African countries are becoming more assertive on the global stage. They are no longer passive recipients of aid or investment but active participants shaping their own development agendas. Initiatives like the African Union's Agenda 2063, the African Continental Free Trade Area, and growing regional integration are signs of a continent striving to define its future on its own terms. In this context, African leaders and institutions are increasingly calling on partners, including China, to align with African priorities.

They want relationships that go beyond infrastructure and raw material extraction. Instead, they are pushing for industrialization, agricultural modernization, digital transformation, education, healthcare and stronger trade partnerships that add real value. In short, they want partnerships based on mutual respect, and shared benefits.

For the relationship to remain relevant and constructive in this new environment, China will need to listen more closely, communicate more clearly and adapt more thoughtfully. This means engaging with African governments, civil society and youth in more inclusive ways. It also means addressing legitimate concerns around debt, governance, and sustainability with humility and responsiveness. Beyond roads and buildings, it requires investing in people through education, skills transfer, and entrepreneurship. Crucially, it demands acknowledging that Africa is not a monolith, but a diverse continent with a wide range of experiences, priorities, and aspirations.

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The future of China–Africa cooperation will depend on whether both sides can evolve from a transactional relationship to a truly strategic partnership. The evolution of China–Ethiopia relations offers a compelling example of this broader shift. Initially centered on infrastructure projects financed by Chinese loans such as roads, dams, and the Addis Ababa–Djibouti Railway, the relationship was largely economic and project-based. Over time, it deepened into a long-term partnership aligned with Ethiopia's development agenda, marked by industrial cooperation in the Eastern Industrial Zone, investment in skills training and digital infrastructure, and integration into the Belt and Road Initiative. This transformation reflects a more strategic approach focused on mutual development, political alignment and sustained cooperation beyond economic exchange.

Ultimately, the goodwill built over past decades provides a solid foundation. As African voices grow louder on the global stage, China has an opportunity to show that it is not only a builder of bridges and ports, but also a trustworthy, long-term partner. This is a pivotal moment to listen, to adapt, and to rise to the challenge of a new chapter in China–Africa relations.

China-Africa Win-Win Cooperation in the Modern Era

MARGARET CHEN
Founder and Honorary President of China Club Spain.
CEO Optimus Horizon

In an era of globalization and multipolarity, China-Africa cooperation has emerged as a model of South-South collaboration, built on mutual benefit and shared development. Over the past decade, this partnership has expanded beyond traditional infrastructure projects into dynamic sectors such as the digital economy, green energy, and industrial modernization. By fostering innovation, creating jobs and addressing developmental challenges, China and African nations have achieved a synergistic effect that transcends mere economic exchange, charting a path of "1+1>2" prosperity.

I. Infrastructu re-Driven Growth: Building Africa's Economic Arteries

For decades, inadequate infrastructure constrained Africa's potential. Through initiatives like the Belt and Road Initiative (BRI) and the Forum on China-Africa Cooperation (FOCAC), China has helped construct modern transportation networks that catalyze regional integration. The Mombasa-Nairobi Railway (Kenya), reducing travel time from 10 to 4 hours, has spurred a 1.5% GDP growth in the corridor and generated 46,000 jobs. The Addis Ababa-Djibouti Railway (Ethiopia-Djibouti), with a freight capacity of 10 million tons annually, has become a vital trade artery.

> China has installed more than 12 million kilowatts of renewable energy capacity in Africa, accounting for 59% of the continent's renewable energy investment. Projects like Kenya's Garissa Solar Plant (50 MW) and South Africa's Sere Wind Farm (100 MW) provide clean energy to millions.

By 2024, Chinese enterprises had constructed or upgraded over 10,000 kilometers of railways and 98,000 kilometers of roads, connecting 700 million Africans. These projects, under the "infrastructure + industry" model, integrate ports, logistics hubs, and manufacturing zones, creating self-sustaining economic ecosystems.

II. Industrial Empowerment: From "Teaching to Fish" to "Learning to Fish"

China's engagement with Africa prioritizes technology transfer and industrial connectivity, to foster long-term self-reliance. In Uganda's Mbale Industrial Park, Chinese investments have attracted over 40 enterprises, creating 5,000 jobs and nurturing local brands. In Egypt, Jushi Company's fiberglass technology has positioned Egypt as a global production hub.

Agricultural collaborations, such as Madagascar's edible fern cultivation, employing over 30,000 people, along with yield-doubling corn programs in Rwanda, showcase how "Field Technical Schools" bridge skill gaps. These initiatives not only address immediate needs but also build a pipeline of technical talent, laying the foundations for Africa's industrialization.

III. Livelihood Enhancement: Sharing Development Gains

China prioritizes improving lives through healthcare, education, and poverty alleviation. During the pandemic, China dispatched 23,000 medical teams, donated 1 billion vaccine doses and established automated vaccine storage facilities, ensuring the safe distribution of 150 million doses.

The "China-Africa 100 Universities Cooperation Plan" links 100 institutions for joint research and talent training, raising higher education standards. In 2023, emergency food aid to South Sudan and Mauritania, coupled with hybrid rice and fern cultivation technologies, empowered millions of smallholder farmers. These efforts improve living standards while building resilience against climate shocks and food insecurity.

IV. Green Transition: Pioneering Low-Carbon Solutions

In the face of climate change, China and Africa are advancing green development partnerships. China has installed more than 12 million kilowatts of renewable energy capacity in Africa, accounting for 59% of the continent's renewable energy investment. Projects like Kenya's Garissa Solar Plant (50 MW) and South Africa's Sere Wind Farm (100 MW) provide clean energy to millions.

Collaborative efforts in desertification control, such as Morocco's seawater desalination technology, address land degradation and water scarcity. The "Green Partnership Action" proposed at the 2025 FOCAC Summit aims to bridge the energy accessibility gap by promoting solar storage, electric vehicles, and other low-carbon innovations.

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V. Open-Win Collaboration: Strengthening Economic Ties

China has been Africa's largest trading partner for 15 consecutive years, with bilateral trade reaching $282.1 billion in 2024—a 6.1% annual increase. Zero-tariff policies for 33 least-developed African countries boost export competitiveness, particularly in agriculture and minerals.

Projects like Ghana's rural communication network (benefiting three million people) and Benin's four China-Benin Friendship Schools have increased access to education. Industrial chain integration, such as cooperation between Shandong enterprises and Côte d'Ivoire in cocoa processing, adds value to African commodities. This "market + capacity + standards" model ensures mutual gains while opening new markets for Chinese businesses.

VI. A Shared uture: Beyond Zero-Sum Narratives

China-Africa cooperation rejects the outdated "resource extraction" narrative, establishing a paradigm of equality and mutual respect. With China's debt share in Africa at 12% (compared to 35% from Western nations), preferential loans, technical assistance, and industrial investments empower African nations to build self-sustaining economies. As South African President Cyril Ramaphosa emphasized, "China is the partner Africa needs." This partnership uplifts African communities while offering a blueprint for modernization across the Global South.

CONCLUSION

China-Africa cooperation stands as a testament to the transformative potential of equal, mutually beneficial partnerships in a rapidly evolving global landscape. Over the past two decades, this collaboration has transcended traditional models of North-South aid and investment, creating a dynamic, people-centered framework rooted in shared aspirations and pragmatic solutions.

By addressing Africa's most pressing developmental challenges—ranging from infrastructure deficits to industrialization gaps and climate vulnerabilities—China has not only unlocked new pathways for African growth but also redefined the contours of South-South cooperation itself.

Tangible outcomes abound. From the game-changing Mombasa-Nairobi Railway to the clean energy revolution exemplified by Kenya's Garissa Solar Plant, China's investments have catalyzed economic integration, job creation and technological leapfrogging across the continent. In education, healthcare, and agriculture, collaborative initiatives have improved the lives of millions, fostering resilience against crises and empowering communities to shape their own futures. Meanwhile, the shift from resource extraction to technology transfer and industrial connectivity has laid the groundwork for sustainable, self-driven development—a stark contrast to exploitative models of the past.

Yet, the significance of China-Africa cooperation extends beyond immediate economic gains. It represents a paradigm shift in global development discourse, challenging the notion that prosperity is a zero-sum game. By prioritizing equality, respect, and long-term partnerships over short-term gains, this collaboration offers a blueprint for how nations of the Global South can harness collective strength to navigate the complexities of globalization, climate change, and geopolitical fragmentation. The success of initiatives like the Forum on China-Africa Cooperation (FOCAC) and the Belt and Road Initiative (BRI) underscores the potential of multilateralism to drive inclusive growth, bridging divides between continents and cultures.

Looking ahead, the future of China-Africa cooperation holds immense promise.

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As the African Continental Free Trade Area and the BRI deepen integration, opportunities for innovation in digital economies, green energy, and advanced manufacturing will expand. The 2025 FOCAC Summit, with its focus on "Green Partnership Actions" and digital transformation, signals a commitment to aligning with Africa's Agenda 2063 and the United Nations' Sustainable Development Goals (SDGs). These efforts will not only enhance trade and investment but also foster resilience against global shocks, ensuring that Africa's development is both equitable and environmentally sustainable.

Yet challenges remain. Ensuring that projects remain transparent, socially inclusive, and environmentally responsible will be critical to maintaining public trust and long-term viability. Addressing concerns around debt sustainability and aligning investments with local priorities will require continued dialogue, adaptability, and a shared commitment to the principles of mutual respect and non-interference.

Ultimately, China-Africa cooperation is more than a bilateral relationship—it is a beacon of hope for a world where collaboration, rather than competition, drives progress. By embracing innovation, inclusivity, and sustainability, this partnership has the potential to inspire a new era of global solidarity. As African nations strive to achieve self-determination and China continues to refine its role as a responsible global actor, their shared journey toward a prosperous, interconnected future will not only reshape the Global South but also redefine the possibilities of international cooperation in the 21st century. Together, they are not merely writing a new chapter in history; they are forging a new narrative—one of unity, resilience, and shared destiny.

Infrastructure, Trade, and Diplomacy: China's Strategic Commitment to Africa

RAMÓN MARÍA MORENO
Secretary General of the Spain-China Foundation

In recent decades, China has transformed its international role. The emerging power of the late 20th century is now a global leader. One of the most significant trends in current international relations is China's growing presence in what has come to be called the Global South.

No region of the Global South has experienced the rise of China as much as Africa. Through strategic investments, loans, bilateral trade and cooperation programs, China has consolidated its presence on the African continent, becoming a key economic, political and diplomatic partner for many countries there.

China's strategy toward Africa has been consistent, systematic and long-term, reflected in its pragmatic model based on helping nations with all kinds of needs. For example, by investing in infrastructure it has extended its influence into the political sphere.

The Barcelona Centre for International Affairs' report, China and the Global South: Old Friends, New Dynamics, shows China has invested more than $300 billion in the region since 2005, two-thirds of which has been allocated to infrastructure, two and a half times more than all other countries combined between 2007 and 2020.

Over the same period, Beijing has become the main trading partner of most African countries. The International Monetary Fund reports the trade volume between China and Africa at close to $300 billion annually, four times that of Africa with the United States. African exports to China focus on raw materials such as oil, minerals, and agricultural products, while China exports manufactured goods, machinery, and technology.

That said, the relationship between China and Africa is asymmetrical. China is an economic superpower with global objectives, while African countries have more fragile economies. Nevertheless, some African governments have managed to negotiate beneficial conditions, diversify their economic partners, and learn from the Chinese experience in industrialization and modernization.

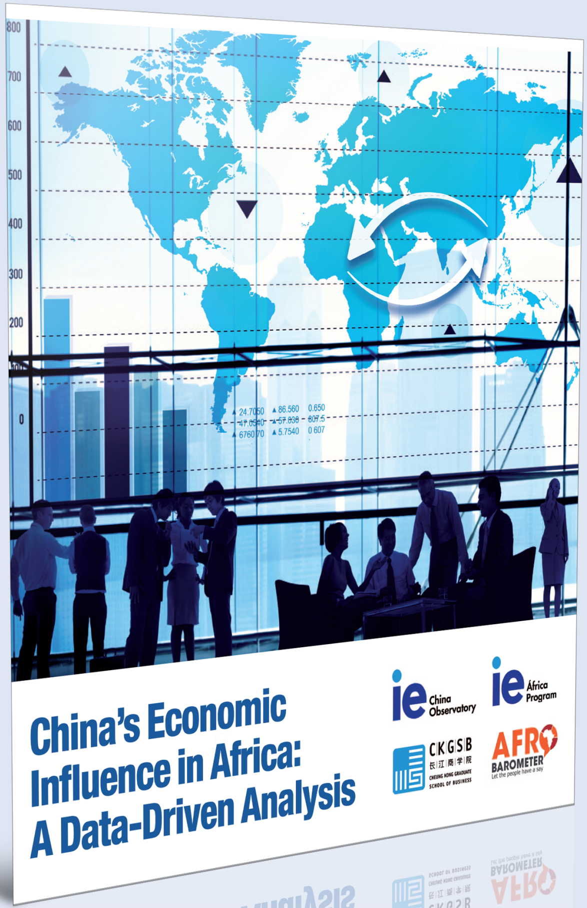
Furthermore, Chinese pragmatism has allowed it to extend its influence beyond the economic sphere. China has deployed troops in UN peacekeeping missions in Africa, established its first overseas military base in Djibouti, and increased the number of academic and cultural exchanges, all part of a soft power push that earns it political capital in Africa.

Not that Chinese influence in Africa is without its critics, who point out that it may undermine labor and environmental standards, reinforce authoritarian regimes, and, above all, leave African countries trapped in a cycle of dependency. The counterpoint to this is that China has filled a vacuum or occupied the space left by former colonial powers and international financial institutions, whose approaches were often conditioned by austerity policies and unpopular structural reforms poorly adapted to the African context.

The key to the future of this relationship lies in the ability of African countries to safeguard their interests, prioritize sustainable development and negotiate agreements that benefit their populations. Investing in Africa means opportunities and challenges, and China is no exception: this requires leadership, strategic planning, and a firm commitment to local development.

In conclusion, China's influence in Africa is a prime example of its emerging role in the Global South. It uses its own development model (combining political authoritarianism with economic capitalism) to prove to African countries that economic development and political stability do not necessarily require liberal democracy.

In conclusion, China has positioned itself as an indispensable partner for many African countries, with which it enjoys complex and sometimes controversial relationships that will have far-reaching implications both for the continent and the global geopolitical balance in the coming decades.



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