

The Future of African–European Relations

Spotlight series compendium



The future of African-European relations project

About the project and this compendium

The Future of African-European Relations project is a policy-facing collaboration between the African Futures & Innovation Programme at the Institute for Security Studies (ISS), the Hanns Seidel Foundation, the Federation of German Industries (BDI) and Megatrends Afrika, comprising the Kiel Institute for the World Economy, the German Institute of Development and Sustainability (IDOS) and the German Institute for International and Security Affairs (SWP).

It explores how shifts in global power are reshaping African-European relations and what they mean for future cooperation. The project was launched in Berlin in April 2026 and combines research and dialogue through three thematic virtual events, a series of policy spotlights and a final capstone event in Pretoria.

This compendium brings together eight spotlights produced by project partners and contributors and published jointly in 2026. Together, they provide a range of perspectives on the changing African-European relationship, examining where interests align or diverge, the opportunities and trade-offs shaping cooperation, and the practical pathways that could be taken forward.

Why this conversation matters now

African-European relations are being reshaped by a more fragmented and competitive global order. Geopolitical rivalry, shifting dependencies, migration politics, energy transitions, rising demand for critical minerals and changing financial flows are altering the terms of engagement between the two regions.

For Europe, cooperation with Africa is increasingly tied to the energy transition, supply chain resilience, migration governance, market access, geopolitical considerations and the defence of a rules-based international system. At the same time, the EU proposes a partnership that goes beyond mere transactionalism and therefore needs to find the right balance or synergy between norms and interests.

For Africa, a more competitive global order creates greater room to manoeuvre, whilst demographic weight, resource endowments, and market potential increase its strategic options and agency.

How can the two regions build on their existing partnership to translate shared ambitions into inclusive, actionable and sustainable cooperation that delivers tangible benefits for both sides?

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Spotlight 1

What America's demographic future means for Africa and Europe

Collin Meisel

US demographic decline could reshape the global balance of power.



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American demographic decline

The world order is undergoing a profound transformation, in part because of the changes occurring among the people who comprise it. In 1975, Europe represented roughly one-sixth of the world's population and Africa roughly one-tenth. The total US population, meanwhile, was more than half the size of Africa's combined population. The median age in Europe was just over 30 years, in the US about 28 years, and in Africa roughly 16 years. Fast forward to today, and the average European is over 40 years old, the average American is about 38 and the average African is just 20. Africa's population today is nearly double that of Europe's and over four times that of the US. Africa's population and its resulting labour force continue to grow rapidly, as Europe's shrinks and ages in the process.

The US, it has been thought, did not share the fate of a collective "West," with a population that has been growing and was expected to continue to grow, albeit not as fast as Africa. Given recent political developments in the US, however, these expectations may soon change, with America joining a collective Western demographic decline – and a decline in global power.

The “American dream” has, for generations, held appeal for immigrants from Africa, Europe and beyond, contributing toward a burgeoning US population and ever-growing labour force. That dream, however, appears as if it will soon fade away. This is at least what recent immigration statistics from the US Census Bureau suggest, which show a historic decline in net immigration into the US and, [they caution](#), ‘are trending toward negative net migration’—a first in over half a century.

US President Donald Trump’s first year in office was “record-breaking,” [according](#) to his administration. While they were referring to the estimated 3 million undocumented immigrants who have reportedly departed the US since January 2025, this superlative applies equally to the dramatic shift in America’s demographic trajectory, with important implications for the future power potential of the US that will affect its role globally if current trends hold. Contrary to the [forecast](#) by the world’s premier demographic forecasting organisation, the United Nations Population Division, the US population may soon be in decline.

These trends matter far beyond the US. As demographic change reshapes the relative power of major actors, it will influence how Europe, China and African countries position themselves in an increasingly competitive geopolitical environment. The idea of an America in relative decline has been [discussed](#) and [debated](#) for many years. An America in absolute decline, if only in demographic terms, is a new topic altogether, only [recently](#) getting attention in policymaking circles—and yet its implications for geopolitical competition would be profound.

People power

Many factors determine whether a country is a major global power: diplomacy, information, military capabilities, and economic size and sophistication (referred collectively to as DIME) are prominent examples. Underpinning these factors, especially economic ones, is demographics, which includes whether a country has a large, relatively well-educated and healthy labour force. A large labour force, in particular, while not independently sufficient to make a country a great power, remains necessary.

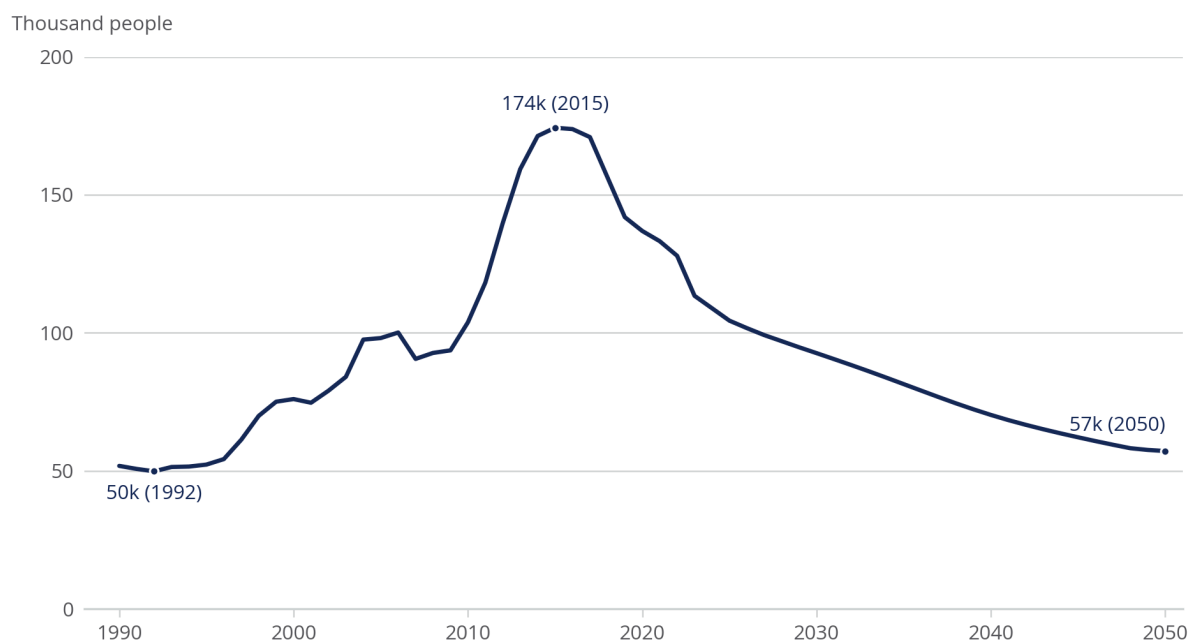
As political scientist Michael Beckley [observes](#), ‘Luxembourg, for example, will never be a great power, because its workforce is a blip in world markets and its army is smaller than Cleveland’s [Ohio, US] police department.’ Even though its workforce was nearly ten times as productive as that of China in 2002, according to [World Bank statistics](#), Luxembourg’s [economy](#) was one-sixtieth the size of China’s due to the latter’s demographic mass.

For most of readers’ lifetimes, outside the Global Financial Crisis and COVID-19 pandemic, the [US labour force](#) has experienced a stable year-over-year increase. This has largely been due to the persistent growth of the [US population](#). Population size, in turn, results from three factors: births, deaths and net migration. Births increase population, deaths decrease population, and the difference between the two is referred

to as “natural” population growth. Migration either increases or decreases a population, depending on whether the net value is positive (more people immigrate than emigrate) or negative (the reverse).

In 2030, the US Congressional Budget Office [projects](#) that “natural” population growth in the US will turn negative as deaths outpace births. When this happens, positive US population growth will require net positive inward migration. Yet, as the US Census Bureau has stated, immigration into the US is on the opposite trajectory. Indeed, despite Africa’s population growing by more than two per cent each year (over double the world average), migration from Africa to the US has been on the decline in recent years and is forecast to continue declining even as Africa’s population continues to grow. Migration from Africa to Europe is also limited, though larger than to the US, given geographic proximity and colonial history.

Chart 1: Historical and forecasted migration flows from Africa to US: 1990-2050



Source: Historical data: T Gaskin and G Abel, “Deep learning four decades of human migration”; forecasts: International Futures

National power can, of course, grow even in the face of shrinking populations—today’s China being a case in point—as increases in capital and advances in technology offset demographic headwinds. The extent to which this would likely be the case for the US (and Europe) under alternative migration futures can be simulated.

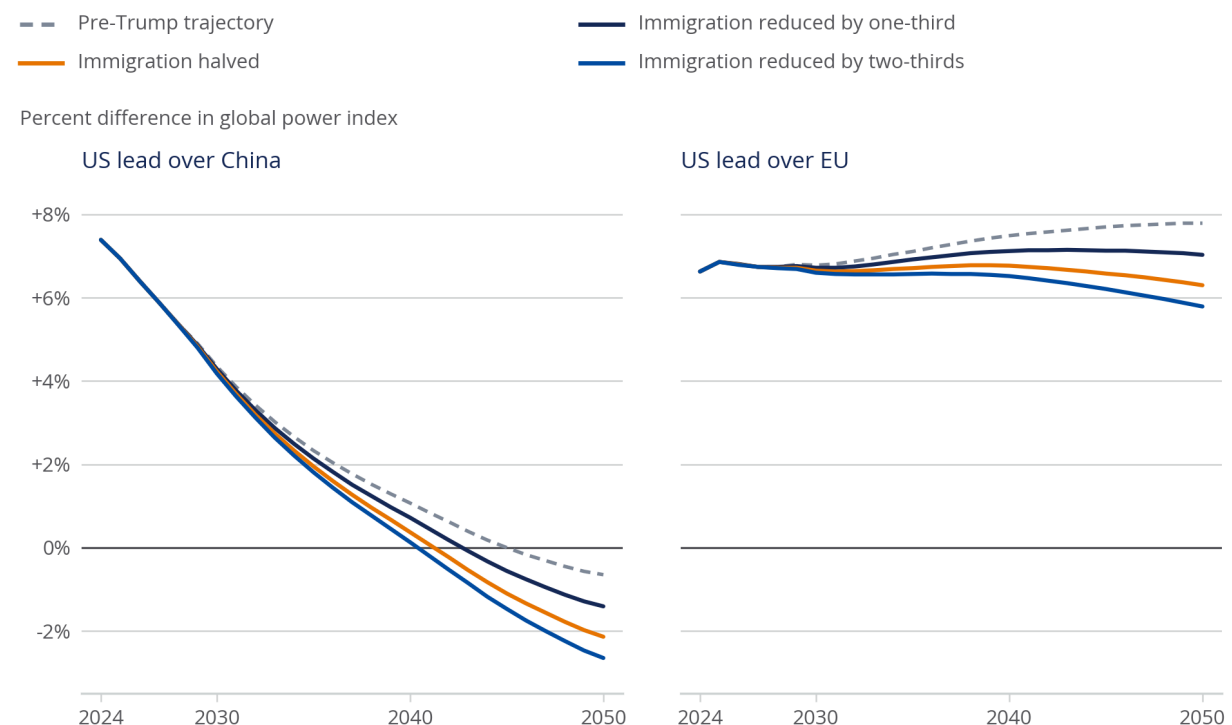
Lower immigration means lower growth and less national power

Alternative scenarios forecasted with the [International Futures](#) (IFs) tool—a complex, quantitative modelling platform that allows users to better understand the implications

of changing, deeply interconnected demographic, economic and other trends—can illustrate the implications of varying US immigration policies. For example, compare a pre-Trump 2.0 trajectory with scenarios in which immigration into the US is alternatively reduced by one-third, one-half or two-thirds. On a pre-Trump 2.0 trajectory, the US population was projected to continue to grow well past mid-century. In any of these three alternative migration scenarios, however, the US population growth shrinks to zero and in the latter two cases begins a long, relentless decline.

The US's lead on the world stage in terms of measurable material capabilities was already in relative decline as other powers, especially China, have grown their own material capabilities at a much faster absolute pace. A shrinking US population will, however, accelerate that pace, as illustrated by long-term forecasts of a composite index of DIME-related factors which collectively measure [national power](#). Meanwhile, a gradually growing relative US lead over the EU, coupled with a lower future immigration to the US, would cement the current US-EU power dynamic, with the EU perhaps even slightly narrowing its power gap with the US. These trends are illustrated in the following chart, which depicts the difference in the per cent of global power (including a demographic contribution) held by the US over that held by China and the EU, as measured by the Global Power Index and forecast across alternative scenarios in IFs.

Chart 2: The US's lead in global power over the EU and China: 2024-2050



Negative values mean China is ahead of the US

Source: International Futures version 8.47; Pardee Institute Global Power Index

A new world order

The Trump administration's visa bans and other restrictive immigration policies have already damaged US relations with the Global South, [including across Africa](#). Forecasts suggest that those policies, if maintained, will further weaken the US position in the long term, as a shrinking workforce and [less innovation](#) hamper the US economy. Indeed, the immediate damage to America's image is salt on a longer-term, deeper structural wound now inflicted by a suddenly much bleaker US demographic outlook. And the pain intensified with the closure of USAID, reductions in humanitarian assistance and on-off trade agreements such as the African Growth and Opportunity Act (AGOA). A demographically weaker and less internationally engaged US will leave a vacuum in Africa that others will fill.

Whether China can take advantage of a weaker US position is uncertain, but early indications suggest it will. Take China's preparation for the upcoming Forum on China-Africa Cooperation (FOCAC) as an example. [According](#) to the China-Global South Project's Eric Olander, while the forum used to have its agenda effectively dictated by the Chinese, preparations for next year's 10th FOCAC have so far been explicitly collaborative, ensuring African partner perspectives shape the conversation. This is despite China possessing far more national power today than during the first FOCAC in October 2000, and may be a sign that China intends to cultivate both its hard and soft power capabilities, as evidenced by China's decision to allow duty-free access for African exports.

The EU, meanwhile, possesses collective national power capabilities roughly on par with China today, though it is forecast to gradually fall farther behind. Unless the EU becomes a truly independent—and collective—hard power in its own right, contrary to current forecasts, its path to remaining relevant in Africa and elsewhere must be paved with its own soft power. In this vein, the latest EU-AU Summit holds promise, particularly if [commitments](#) such as treating migration as an opportunity rather than a challenge are followed through on by both sides. If instead the EU shuns migration from Africa, Europe's own demographic decline, which is already in progress, will accelerate and thus, like the US, its decline in global power.

The implications extend beyond the major powers themselves and will also shape the future of Africa-Europe relations. As US influence evolves and global power becomes more dispersed, Africa's strategic importance will grow. This could create new opportunities for African governments to strengthen their leverage in trade, investment and diplomatic engagement. For Europe, remaining a relevant partner may require deeper, more mutually beneficial cooperation rather than relying solely on historical ties. Migration, critical minerals, energy cooperation and investment are likely to become increasingly important areas through which these regions navigate a changing geopolitical landscape.

How Africa and Europe respond to these changes may prove just as important as the shifts themselves. Demographic trends shape the distribution of power between major actors and the choices available to partners. In this context, strengthening long-term partnerships, mutual understanding and sustained policy dialogue will be as important as economic or security engagement in shaping the future of EU-Africa relations.

Author's Note



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Spotlight 2

The untapped potential of labour and education migration from Africa to Germany

David Kipp, Emma Landmesser and Prof Dr Tobias Heidland

While public debate on migration in Europe focuses mainly on irregular migration, regular routes for labour and education migration from Africa have been expanding. Whether these become fair and mutually beneficial pathways will depend on how they are designed and supported.



Johann Wadephul (CDU), German Federal Minister for Foreign Affairs, is visiting the trainees of Krones, a company which trains mechatronics engineers in Nairobi as part of its dual training programme.

© picture alliance / AA/photothek.de | Thomas Koehler

By 2050, Africa is expected to account for [around a quarter of the global working-age population](#), whereas the working-age population in many European countries is shrinking. In recent years, the German federal government has become increasingly open to recruiting workers from third countries such as [India](#), for example through [bilateral migration agreements](#) and [reforms to migration legislation](#). However, key countries of origin for migrant workers, such as [Vietnam](#), have themselves been ageing for some time, and in [India](#) too, the current labour surplus is expected to decline over the long term. Across sub-Saharan Africa, many countries are experiencing sustained growth in their working-age populations and are therefore likely to become key countries of origin for the recruitment of skilled workers in the future. So far, however, the potential to attract workers from the young societies of sub-Saharan Africa to the labour markets of Europe's ageing societies has barely been addressed at the policy level.

Labour and education migration from Africa is growing, but Germany is making only limited use of this potential

A rise in migration for employment, vocational training, or study is already evident today, when for example looking at the corridor between African countries and Germany. This trend is reflected in the sharp increase in the number of visa applications processed by German embassies in African countries for the purpose of employment: Between 2019 and 2025, this number almost quadrupled, rising from around 7,860 to 29,415. A large share of this increase is attributable to the rise in the number of visa applications for vocational training and further education, which increased from 1,318 in 2019 to 7,531 in 2025. These figures do not include asylum applications or family reunification. They refer to visa applications and primarily show how sharply demand has grown, but they do not indicate how many visas were granted or how many people actually moved to Germany. Available evidence suggests that the [rejection rate for visa applications](#) from these countries is significantly higher than that for applicants from other regions of origin.

According to Eurostat data, Germany was not the leading destination within the EU for migration from African countries between 2014 and 2023. It ranked fourth in terms of [the total number](#) of arrivals, fifth for [labour migrants](#), and at least third for [education migrants](#). At the same time, it is important to note that the [majority of African migrants](#) continue to migrate within the continent, even as migration from African countries to Germany and Europe gradually increases.

While North African countries top the list of African countries of origin for labour and education migration to Germany and are the main focus of European-African cooperation, the recruitment of skilled workers from sub-Saharan African countries is less pronounced. However, inflows from individual countries such as Kenya, Ghana, and Cameroon are growing, albeit from a significantly lower base.

Kenya: Marked rise in visa applications processed for nurses

To date, German and European migration cooperation has primarily focused on cooperation with state institutions in partner countries, usually in connection with demands for improved cooperation on the return of nationals required to leave the country. One example is the [bilateral migration agreement](#) with Kenya, concluded in September 2024 at the initiative of former German Chancellor Olaf Scholz. Although it is still too early to assess the effects of the agreement, the number of visa applications processed for Kenyan nurses rose sharply, from 3 in 2022 to 389 in 2025.

Ghana: growing interest in studying in Germany

[Ghana is considered a priority country](#) for the recruitment of skilled workers to Germany. Interest in studying in Germany is also growing significantly: Whereas 621 visa applications for study purposes were submitted in 2019, this figure had more than

doubled to 1,340 by 2025. In the winter semester of 2024/2025, there were 2,918 Ghanaian nationals enrolled at German higher education institutions. A bilateral migration agreement with Ghana has been under discussion for some time and should be finalized in order to make better use of Ghana's comparatively strong education base, also for the immigration of already qualified professionals to Germany.

Cameroon: traditionally high student numbers and significant growth in vocational training

Cameroon has long been an important country of origin for students in Germany, ranking fourth among African countries in [the winter semester of 2024/2025](#) with 6,837 students. This is due in part to the fact that the [Cameroonian high school diploma often qualifies students to study at German universities](#). What is new is the significant increase in labour migration, particularly in the area of vocational training. According to [statistics from the Federal Employment Agency](#) (BA), the number of Cameroonian nationals in vocational training positions in Germany rose from 950 in 2019 to 5,260 in May 2026. A remarkable aspect of this trend is that the increase is likely attributable both to the initiative of Cameroonian migrants themselves and to support from private recruitment agencies and diaspora networks.

This raises a political question that is not unique to Cameroon: If such migration corridors emerge without state intervention, what role do non-state actors play, and what is the state's responsibility? The state's role is not to create demand for labour, which clearly already exists, but to provide what individual initiative and private recruitment agencies cannot. This includes, for example, supporting the recognition of qualifications and pre-departure training through dialogue with countries of origin. At the same time, corridors such as the one between Cameroon and Germany carry an increased [risk of exploitative recruitment practices](#), such as high agency fees paid by the migrants. This makes it all the more important to run [information campaigns](#) in countries of origin to educate people about regular migration channels, qualification requirements, and recognition options, while also warning them about unscrupulous intermediaries, excessive costs, and the risks of exploitation in Europe. Only then can emerging pathways for regular labour and education migration expand sustainably and fair and be shaped in ways that have positive development impacts in countries of origin.

Positive development impacts of regular migration from Africa

The added value of regular labour and education migration for Germany is clear. However, labour mobility can present both opportunities and risks for the countries of origin, depending on the sector and the specific arrangements. If properly managed, labour mobility can bring considerable benefits, and migrants themselves are the most direct beneficiaries. In Germany, it is possible for them to earn several times more for the same work than they could in their country of origin. Through remittances, this

private benefit can also have positive development impacts in countries of origin. In low- and middle-income countries, remittances significantly exceed [official development assistance \(ODA\)](#). In addition, migration can have non-financial effects, such as when the prospect of migration [strengthens incentives for education in the country of origin](#) ("brain gain"). Positive development effects can also arise when migrants circulate between countries or return after a few years and apply newly acquired skills in their countries of origin ("[brain circulation](#)").

The widespread concern about the loss of scarce skilled workers ("[brain drain](#)") must be taken seriously in principle, but in many cases it does not reflect labour market conditions across sub-Saharan Africa. This is particularly true of skilled workers who emigrate because they cannot find suitable work in their country of origin or are employed below their level of qualification. Even in cases where people emigrate due to limited training opportunities in their country of origin to pursue higher education or vocational training in Germany, this does not necessarily result in a loss of skilled workers for their country of origin. Problems arise when the most highly qualified individuals are systematically recruited away by other countries, for example when the emigration of healthcare professionals destabilizes already fragile health systems. However, even in these cases, the picture is more complex than the debate suggests. Ghana, for instance, is on the [WHO's "Workforce Support and Safeguards List"](#) to protect against active state recruitment, as do many countries with strained health sectors. At the same time, it [is now training more nursing staff than the domestic labour market can absorb](#), partly because the Ministry of Health has expanded training programmes and authorized private providers. Ghana is expected to be taken off the Safeguards List when [it is updated](#) in [2026](#).

Options for promoting education and labour migration from sub-Saharan Africa

The trends described will not become established on their own; the structural barriers to accessing the German labour market are still too great. This applies in particular to recruitment from sub-Saharan Africa, where functioning ecosystems for education and labour migration to Germany are almost non-existent. [Obstacles](#) include lengthy visa issuance and qualification recognition procedures. The "[Work and Stay](#)" agency planned by the Federal Government is intended to address these problems through the further digitalization and centralization of processes, although agreement within the Federal Government on its structure has yet to be reached. In any case, well-managed and successful recruitment of skilled workers will require a comprehensive approach that also addresses conditions in countries of origin, including in Sub-Saharan Africa.

German development cooperation has stepped up such measures in recent years. For instance, the Federal Ministry for Economic Cooperation and Development (BMZ)'s programme "[Shaping development-oriented migration](#)" and the [Centres for Migration](#)

[and Development](#) in Ghana and Nigeria have provided information on opportunities for regular labour migration and vocational training in Germany. However, many of these projects have been unable to lift structural barriers, such as the recognition of qualifications and vocational certificates obtained in sub-Saharan African countries or to serve as a platform to connect with the BA and German employers. In view of potentially dwindling funding, it would be sensible to set priorities for the migration related development cooperation: for instance, there should be greater [investment in training capacities](#) and in the expansion of mobility pathways for trainees to Germany. In this way, local skills levels can be improved, benefiting potential migrants and those who wish to remain in their country of origin. Development cooperation projects should be linked even more closely to diaspora activities and engagement in the field of technical and vocational education and training. In doing so, priority should be given to [high-performing, predominantly public-private TVET providers](#) in countries such as Ghana and Kenya. It will remain important not to turn development cooperation solely into a tool for recruiting skilled workers to Germany, as this would also contradict the [requirement for it to qualify as ODA](#).

German companies also need more support: Recruitment from sub-Saharan Africa involves high costs and information barriers that deter small and medium-sized enterprises in particular, creating a coordination problem that justifies state support. The [WE-Fair Skilled Workers Alliance](#), initiated by the BMZ, can help raise awareness among companies about fair recruitment and, with the involvement of non-state actors, develop practical cooperation models. Companies that are already active in the markets of the relevant countries of origin, or that already recruit workers in a fair manner, could play a particularly pioneering role in this regard.

Authors' Note



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Spotlight 3

Critical minerals will reshape European-African relations

Jonathan Kaupenjohann

Critical raw materials are shaping the global geoeconomic landscape. For European industry, access to these materials is essential to maintain competitiveness. For resource-rich African nations, they offer potential for their own industrialization. This will bring Europe and Africa closer together.



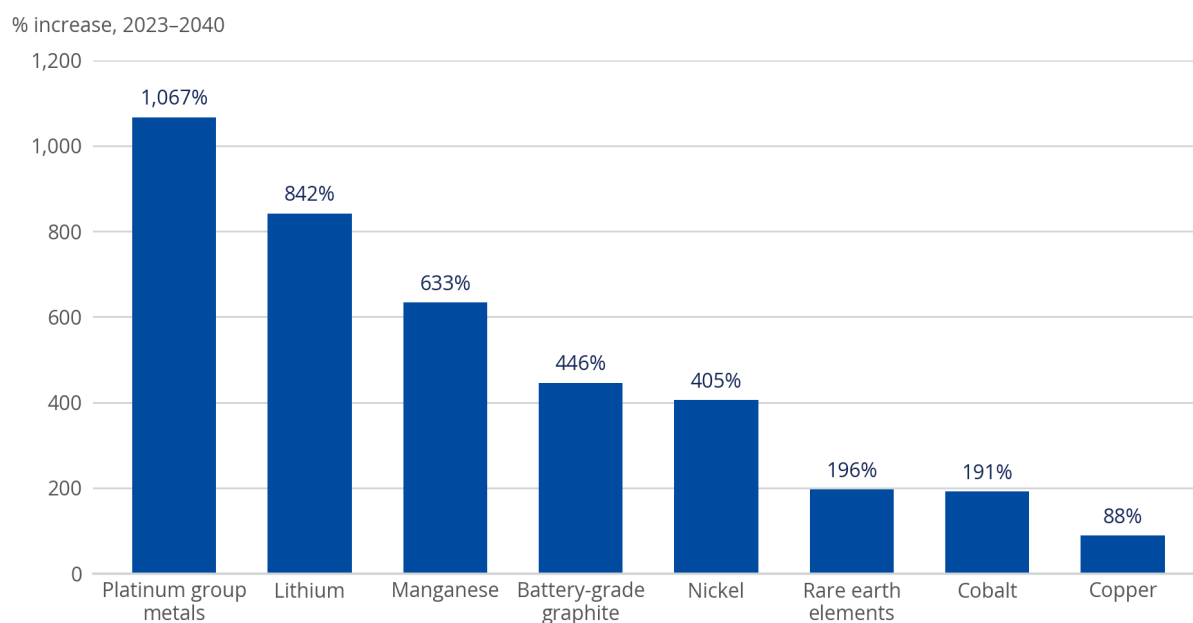
A truck carries raw Lithium at Sandawana Mines in Mberengwa, Zimbabwe, November 19, 2025.

© picture alliance / Matrix Images | Matrix Images

Higher demand and unstable supply in resource markets

The security of raw material supplies has been increasingly at risk for some time now. Two developments in recent years have strained global raw material markets. First, the energy and mobility transitions, computing power for artificial intelligence, and the massive expansion of global defense capabilities are driving demand skyward, which must still be followed by the development of the associated mining and processing capacities.

Chart 1: Projected Percentage Increase in Demand for Selected Minerals from Energy Transition Technologies by 2040 (Relative to 2023 levels)

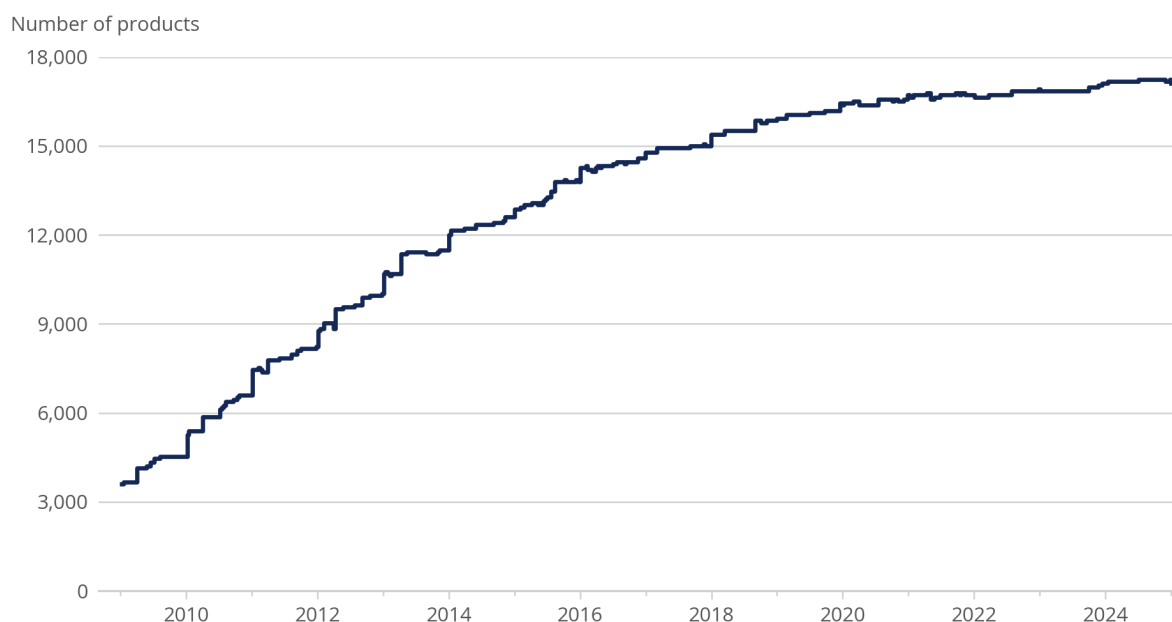


Source: African Development Bank (AfDB), based on IEA STEPS

Secondly, the growing geopolitical nature of commodity markets increases the likelihood of supply chain disruptions, a risk further exacerbated by the concentration of processing capacity (in particular). The geopolitical dimension is reflected in the restriction of raw material exports to advance political and strategic interests. Since 2009, [according to the OECD](#), the number of raw material products exported that are subject to at least one export restriction has more than quadrupled. This pressure, caused by concentrated risks in the supply chain, reached its peak in 2025, when China restricted exports of heavy rare earths and related permanent magnets, which caused significant stress to industrialized countries all over the world.

Chart 2: Number of exported raw material products to least one export restriction

This figure covers all measures applied to covered raw materials across implementing countries, including existing, new and discontinued measures

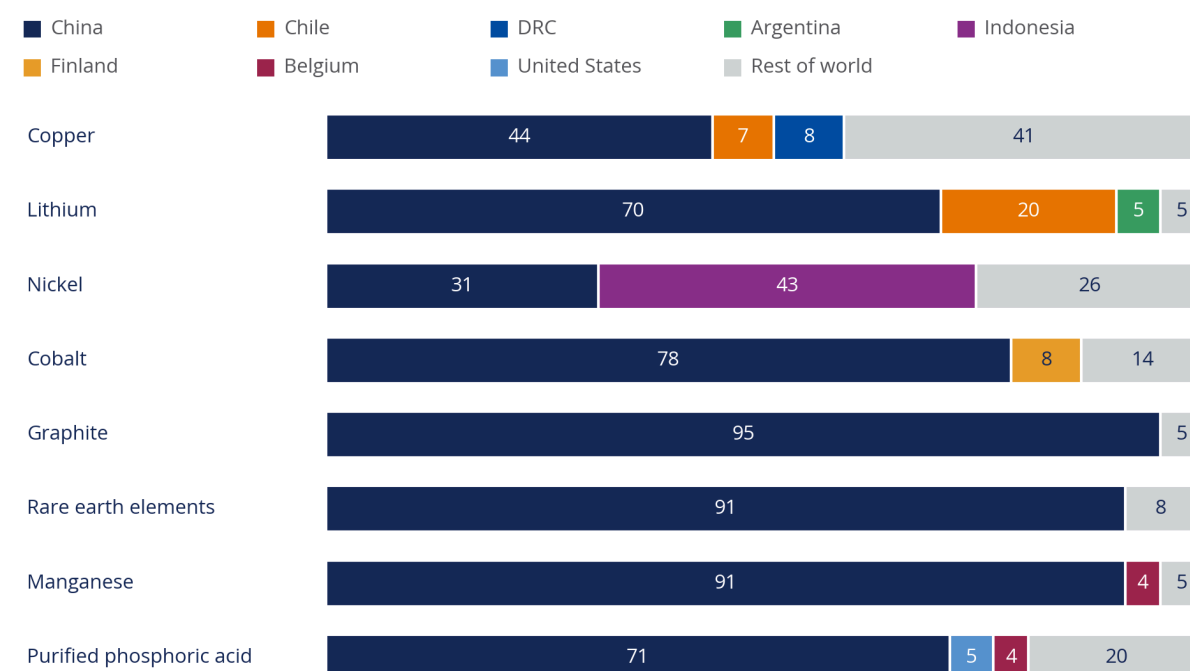


Source: OECD Inventory on Export Restrictions on Critical Raw Materials (OECD, 2026)

Diversification as a strategic imperative for European industry

To prevent supply chain disruptions for raw materials, diversifying raw material sources is one of the most important elements for European industry. So far, so simple - in theory. For companies, however, implementing a diversification strategy is challenging in practice, since a) they must identify alternative sources that actually reduce risk in their supply chain, and b) these alternatives must meet both price and quality criteria. In raw material value chains that are highly concentrated in processing and refining, this means that alternative sources must be established. This is especially the case, for example, with the processing of rare earths, graphite, copper, manganese, cobalt, lithium, and other raw materials, for which China [accounts for a large portion](#) of global production within its own borders.

Chart 3: China dominates the refining of most key minerals in 2024



Where key minerals are refined in %

Shares may not sum to 100 because of rounding

Source: International Energy Agency (IEA); European Council on Foreign Relations (ECFR)

Even though establishing alternative value chains is both capital- and time-intensive, this step remains an absolute necessity. In 2024, [BDI and Roland Berger calculated](#) that the macroeconomic costs to Germany in the event of a Chinese export ban on lithium and lithium-containing products would amount to 115 billion euros, thus, not diversifying will eventually be the more expensive scenario. Similar to other countries like Japan and recently also the US, the EU and its member states therefore adapted their raw materials-related policies and instruments (like the CRMA or the German Raw Materials Fund) to invest in mining, processing and recycling capacities as well as innovation to support and de-risk companies' diversification efforts.

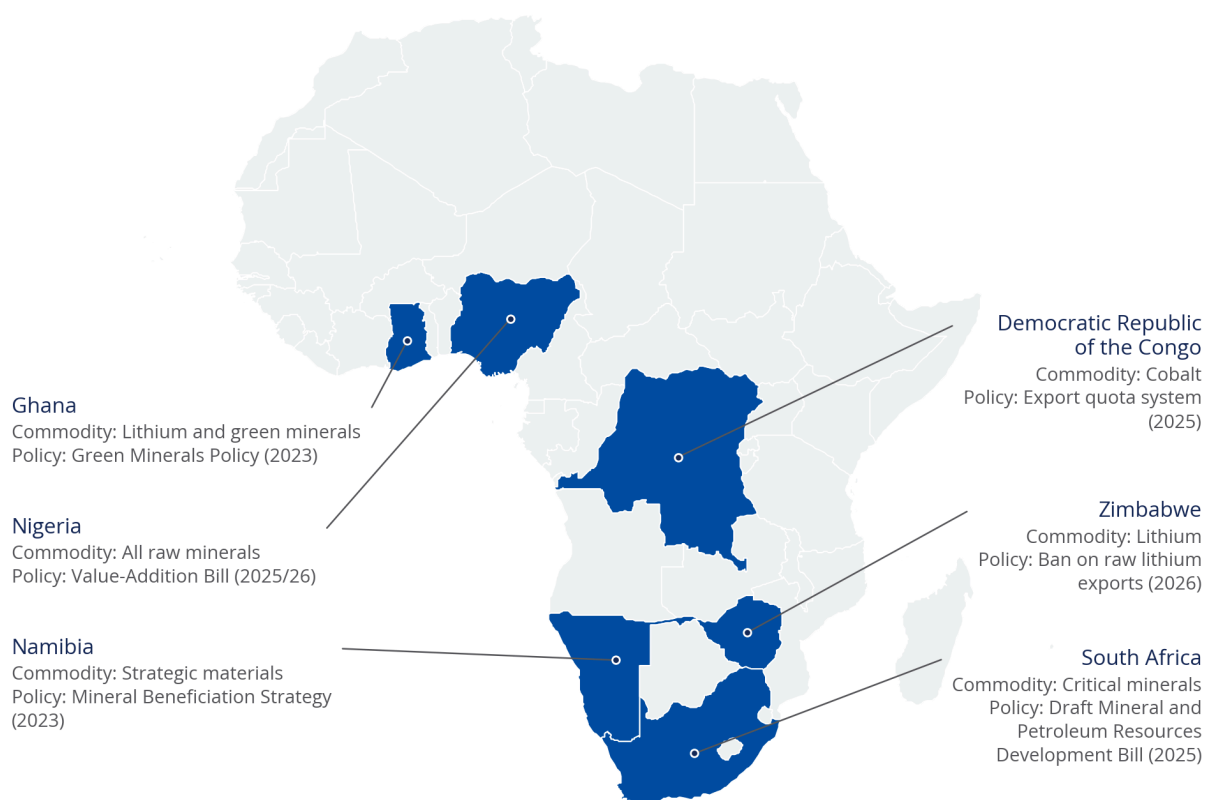
Africa's own ambitions

This is why Europe is turning its attention more strongly towards Africa: The continent is home to approximately 30 percent of the reserves of critical raw materials, including strategically important resources such as copper, cobalt, platinum group metals, manganese, bauxite, and lithium. At the same time, African countries rich in raw materials are implementing industrial policy measures, such as export restrictions on unprocessed minerals and local-content requirements, to gain a larger domestic share of the value added. Rather than remaining exporters of raw commodities, governments seek to increase fiscal revenues, strengthen foreign-exchange earnings, create skilled

employment, and foster industrial diversification through [downstream activities](#) such as refining, smelting, battery component production and manufacturing.

Chart 4: Strategic raw material regulations in African states (2026)

Strategic mineral policies are reshaping value chains across Africa, with a growing focus on beneficiation and export controls



Source: Illustration based on national mineral policies and legislation

Since local processing goes hand in hand with knowledge and technology transfer, infrastructure development, and the adaptation of legal frameworks for the needs of industrial value creation, it can serve as a facilitator for the overall industrialization of African countries.

Mixed feelings about African industrial policy, yet great potential

European industry is watching the implementation of industrial policy instruments in African countries with mixed feelings. On the one hand, market interventions, such as export controls or bans, can lead to supply shortages and additional bottlenecks in raw materials markets. Furthermore, as African countries build processing capacities and refineries, they are increasingly entering direct competition with European raw materials companies.

On the other hand, the industrial ambitions of African producer countries need not be at odds with Europe's diversification objectives. In fact, both sides increasingly share an interest in reducing the concentration risks that characterize today's critical raw material supply chains. While African governments seek greater domestic value creation, European companies are looking for alternative sources of processing and refining capacity beyond existing market hubs. The development of commercially viable processing industries in Africa can therefore create a degree of strategic alignment: African countries expand their industrial base and economic participation in global value chains, while European industry gains access to more diversified and resilient supply networks. This convergence of interests also creates new business opportunities. The construction of refineries, smelters, battery-material plants and related industrial facilities requires advanced engineering, industrial equipment, digital solutions, automation technologies and technical expertise. European companies possess longstanding capabilities across these segments and can contribute machinery, technical know-how, training and operational expertise. Such cooperation can improve the competitiveness of African downstream industries while simultaneously creating long-term commercial partnerships and reducing supply chain concentration risks.

By providing advanced equipment and supporting the development of local industrial ecosystems, European companies can help improve the commercial viability and international competitiveness of African downstream industries while simultaneously strengthening long-term economic ties between Europe and resource-rich African partners.

From resource extraction to industrial partnerships

The increasingly shared interest in diversification and industrialization is already reflected in a growing number of partnership models between Europe and Africa. Rather than focusing exclusively on the extraction of raw materials, cooperation is gradually expanding towards the development of entire industrial ecosystems.

One example is the emergence of strategic raw materials partnerships and investment frameworks that seek to link European demand for critical minerals with African industrial development ambitions. Initiatives such as the EU's Global Gateway strategy increasingly emphasize infrastructure, energy generation, transport corridors, skills development and industrial processing capacities alongside mining projects. Such investments can help address some of the structural bottlenecks that have historically limited value addition in resource-rich economies.

At the commercial level, long-term offtake agreements, joint ventures, and project financing structures can help reconcile the interests of both sides. For European companies, such arrangements improve supply security and facilitate diversification. For African governments, they can reduce investment risks and support the development of domestic processing industries. While not every project will prove commercially viable,

these partnership models offer a more balanced framework for cooperation than traditional resource-export relationships.

The reality check: can Africa deliver supply chain diversification?

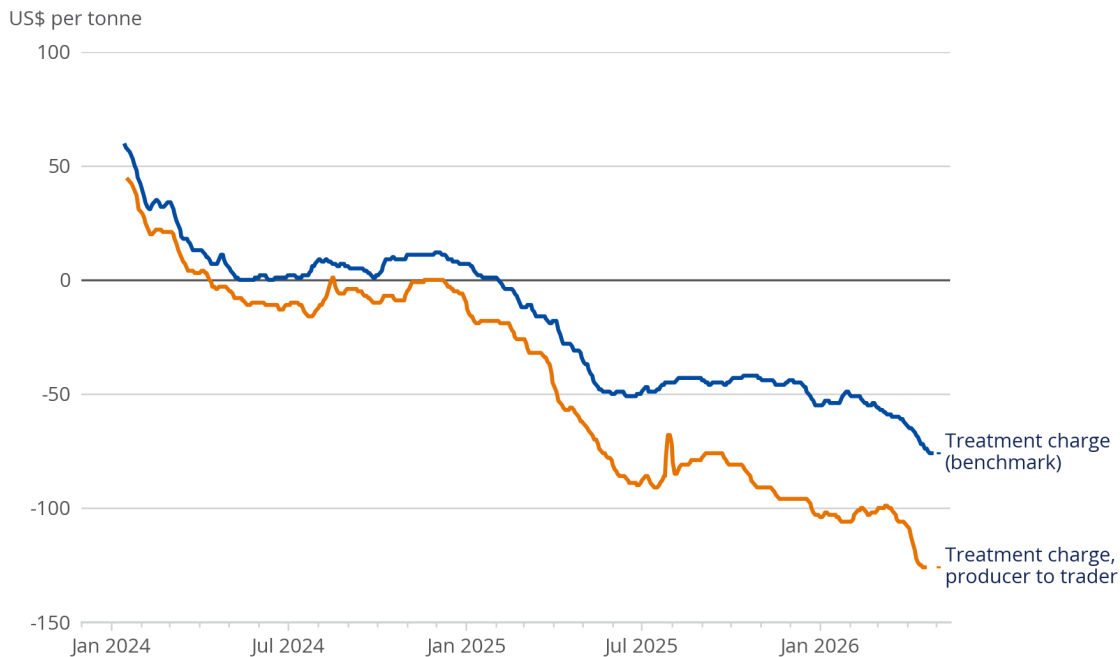
Despite the undisputed potential of such an approach, many challenges remain. One should therefore not underestimate the difficulty of building competitive processing industries for critical raw materials. The establishment of refineries, smelters or precursor-material plants typically takes longer than a single legislative cycle. Industrial capabilities, supplier networks, regulatory frameworks and skilled labor pools are inevitably built up gradually over many years. Experiences from established refining locations in [Asia demonstrate](#) that industrial ecosystems emerge over decades rather than years.

At the same time, this industrial expansion is a very capital-intensive and risky endeavor. Modern mineral processing facilities require billions of euros in upfront capital expenditure, long planning horizons and a high degree of investor confidence.

Perhaps the most important challenge concerns infrastructure. Competitive mineral processing requires reliable access to energy, transport corridors and logistics networks. At the same time, many African governments face limited fiscal space and therefore depend on foreign investors to finance large-scale industrial projects. This creates an inherent tension between the desire for greater national control over value chains and the need to attract international capital. Whether such a balancing act can be achieved depends on the bargaining power that African countries bring to the table. That, in turn, depends on whether their own natural resource reserves are large enough or whether the ore content is high enough to provide strong incentives for foreign investors to invest.

Even if these challenges are overcome, African refiners and smelters must still enter markets that are already highly consolidated and characterized by significant economies of scale. This is particularly evident in copper processing. Over the past decade, smelting capacity – especially in China – has expanded much faster than the availability of copper concentrate. As a result, competition for feedstock has intensified dramatically. The most visible indicator of this development is the collapse of treatment and refining charges (TC/RCs), a key revenue source for smelters. In 2025, spot TC/RCs fell into [negative territory](#). In practical terms, this means that smelters were effectively paying miners for access to concentrate rather than being paid for processing it.

Chart 5: Copper TC/RC fall into negative territory



Smelting capacity growth is outpacing copper concentrate supply

Source: S&P Global Energy (Platts Clean Copper Concentrate CIF China treatment charges)

For countries seeking to establish new smelters, these developments constitute a significant warning signal. Entering an industry in which established operators are already struggling with profitability substantially increases commercial risks for new market participants. Moreover, incumbent refining hubs benefit from integrated supply chains, large domestic markets, extensive technical expertise and strong economies of scale that are difficult to replicate. The challenge for African countries is therefore not merely to build processing facilities, but to ensure that these facilities can – in the long run – operate competitively and profitably in highly contested global markets. Ultimately, the prices at which African producers can offer processed and refined raw materials determine whether European companies are willing to pay a certain premium in order to diversify their sources (to a certain extent) away from Chinese suppliers.

Despite these constraints, the strategic logic underpinning closer European-African cooperation on critical raw materials is likely to persist. The status quo entails considerable risks for both sides: European industry remains exposed to highly concentrated supply chains, while many African economies continue to capture only a limited share of the value generated from their natural resources.

But Africa and Europe still have a long way to go. Neither diversification nor industrialization can be achieved overnight. Building alternative raw material value chains takes time and ties up capital.

And yet, given the risks that maintaining the status quo poses for European industry and the limited returns that African countries derive from the global raw materials sector, pursuing a stronger partnership between both continents is in mutual interest. The great potential for European-African Raw Materials Partnerships lies in partnerships that combine Africa's resource endowment with European technology, capital and industrial expertise. Where commercially viable conditions exist, investments in processing capacity, industrial infrastructure, skills development and integrated value chains can simultaneously strengthen Europe's supply security and support Africa's industrial ambitions. In this sense, the often-cited "partnership among equals" is not a political commitment, but rather an economic imperative for reaching the industrial policy goals of both sides.

Author's note



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Spotlight 4

Toward a “mini-polar” future: where do Africa and Europe stand?

Collin Meisel

In 2050, the world will be warmer, older, more African, less European and with a ‘mini-polar’ world order. Collin Meisel explains how political choices governments make today will determine whether the future is shaped by greater cooperation or rivalry.



Over the last 25 years, the leaders of the European Union and the African Union have built a partnership and discussed cooperation to jointly face future challenges, as they did at the seventh EU-AU Summit in Luanda, Angola on 24 November 2025.

© picture alliance / Hans Lucas | POOL UNION EUROPEENNE / AGENCE HANS LUCAS

The world order is undergoing a fundamental transformation. In 2022, former German Chancellor Olaf Scholz [asserted](#) that the world following Russia’s invasion of Ukraine faced a ‘Zeitenwende: an epochal tectonic shift.’ Chinese President Xi Jinping often [extols](#) geopolitical ‘changes unseen in a century.’ And in a recent speech, Director General of the African Union Commission, Fathallah Sijilmassi, [declared](#), ‘We have come to hold the pen. And to build the new world order, and to contribute to building the new world order, while the plans are still on the table.’

These statements raise as many questions as they answer. What direction is the world order turning? How is it changing? What exactly is being built? Which implications does this dynamic have for Europe, Africa and their relations? To look clearly ahead, we must first look at the past.

The past

Rewind to 1975. The world order—defined by Cold War competition between the United States (US) and the Soviet Union—was bipolar, but unevenly so: the US held a clear edge over the Soviet Union in terms of its economic, military, demographic and technological foundations for national power, a shorthand term describing the capacity a country has to influence the actions of others as well as resist others' influence. The American economy [was](#) nearly double the size of the Soviet economy. Soviet figures are difficult to verify, but one [estimate](#) for 1975 would convert to roughly US\$250 billion in 2023. Again, the US spent more than double on the military without placing great strain on its economy. While the Soviet [population](#) was larger than the US population, it was also older and had a lower life expectancy.

Geopolitically aligned with the US, the combined power of Western Europe—that is, the total sum of its countries' economic, military and other capabilities—ranked third in the global hierarchy behind the US and the Soviet Union. It possessed strong colonial-era ties that shaped Africa's economic life, for example, with nearly two-thirds of the continent's imports coming from Europe. In terms of demographics, Europe comprised roughly one-sixth of the world's population, while Africa comprised roughly one-tenth. The median age in Europe was just over 30 years old; in Africa, it was roughly 16.

Despite its prowess today, China meanwhile was still focused primarily on maintaining internal order amid the tail end of its Cultural Revolution, with a large share of its meagre (by comparison) roughly US\$20 billion defence budget being allocated to internal security. Likewise, China had barely begun to expand its influence abroad, with the exception of the Tazara railway line in Tanzania, which connects the country to Zambia as part of a broader strategy of political solidarity and development cooperation with Africa.

By 2000, that order had inverted. The Soviet collapse had left the US as the sole superpower in a context where, as [announced](#) by President George H.W. Bush on 11 September 1990, a “new world order” could emerge. Eleven years to the day afterwards, that suddenly seemed naïve, but at the turn of the millennium, the world remained unipolar, with an unrivalled American economy and military.

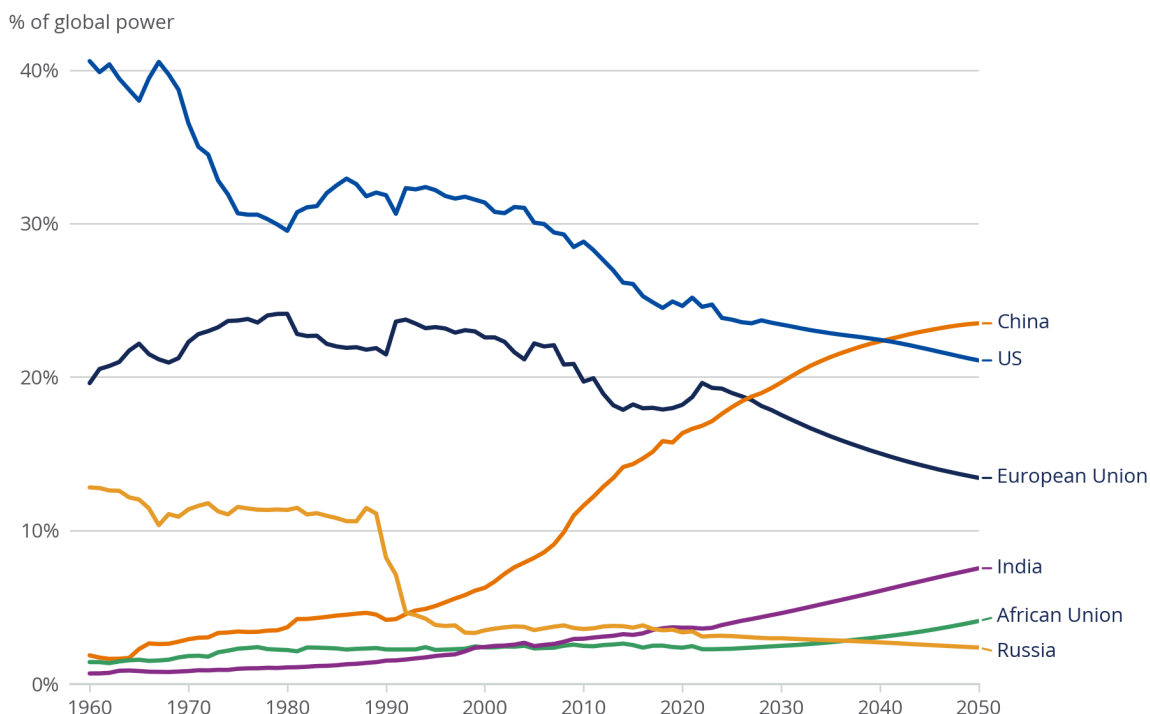
Below that top tier of the international order, however, China had quietly closed the gap with Germany, France, Britain and Japan. Russia, meanwhile, had ceased to be a top influencer in any single African country, and Britain's global footprint contracted sharply.

The fleeting American moment passed. By 2025, China's economic, military and technological rise had become impossible to ignore, even while its population peaked. The US still clearly possessed more national power than any other country in the world, including by spending roughly triple on its military relative to the Chinese, but its lead over China had shrunk substantially and was smaller than the gap between the US and

the Soviet Union amid the Cold War. India's rise was also undeniable, owing in large part to a massive demographic tailwind where the dependency ratio of elderly and youth to working-age individuals continued to decline (while rising in much of the West), with its national power approaching parity with top European powers.

Africa's diversification of its economic, political and security ties meant that the colonial powers of Europe were steadily displaced by China, which, by 2025, was a source of more than one-fifth of Africa's goods imports, as well as by a fast-growing Middle Eastern diplomatic presence, particularly in East Africa. Some consider this to be a world on the brink of [multipolarity](#), though its bipolar traits are strong enough to foster rhetoric about a potential ["New Cold War"](#).

Chart 1: Share of global power, 1960-2050



Global power as measured by the Global Power Index

Source: Pardee Institute, forecast from *International Futures* version 8.72

The future

Where the world may be headed in the coming decades is unknowable in specific, micro-level detail. Yet at the macro level, a few things are relatively certain: in 2050, the world will be warmer, older, more African, and less European.

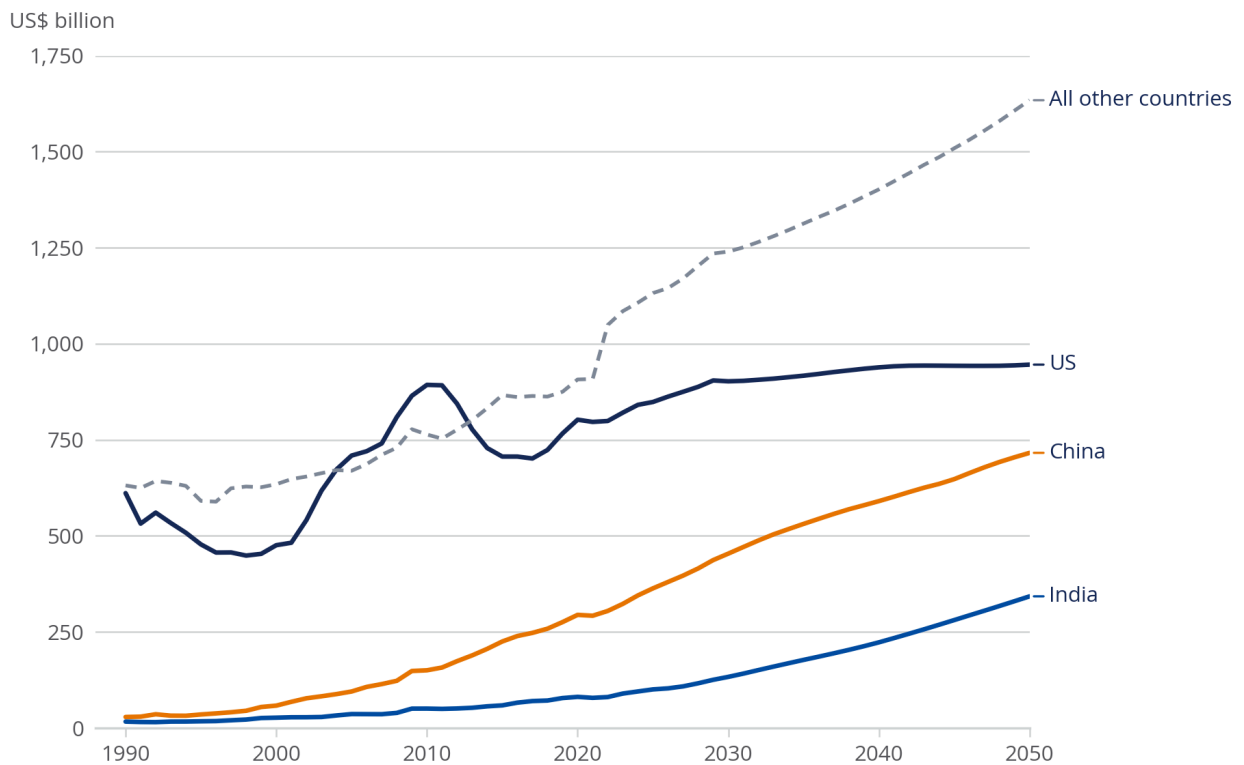
A quarter century from now, [long-term projections](#) of fertility, mortality and migration suggest that roughly one in fourteen people on the planet will be European, with the median age in the late 40s. Roughly one in four people will be African, with the median age in the mid-20s. Still, given present-day advantages and extraordinary human capital,

we can expect Europe to account for one-sixth of global economic activity by 2050, the US for roughly one-fifth and still-rising (if slowly) China for around one-quarter. Despite lacking comprehensive national power, as individual African consumers gain purchasing power, the continent is likely to become a market characterised by increasing competition and rapid growth. Dynamic projections of aid, trade and arms patterns, as well as of diplomatic engagement, suggest China will gain influence in Nigeria and Ethiopia while the EU and the US hold their ground in Egypt and South Africa, for example.

Militarily, on a global scale, the US military is expected to further dominate, with a budget exceeding US\$1.1 trillion in today's dollars. China is forecast to spend roughly US\$800 billion on its military, Western Europe around US\$500 billion, and Russia about as much as it did in 2025, around US\$150 billion.

Collectively, these and other data points paint a picture of a "mini-polar" world: a world order which is largely a bipolar competition between the US and China, though with one bloc (the EU) and one country (India) likely possessing enough power to shape geopolitics within their immediate geographic regions and, more broadly, on issues such as digital sovereignty where they invest considerable resources. Beyond that, the distribution of power will be more diffuse. Small powers are unlikely to consolidate into large poles or spheres of influence, but could make it more difficult for others' plans, especially given massive increases in military spending. (For example, Nigeria's military expenditures are forecast to more than triple in real terms over the next 25 years.) No new actor is likely to replace the leading powers, but neither can they be ignored.

Chart 2: Military spending, 1990-2025



Constant 2021 US dollars

Source: *International Futures* version 8.72

The present

Of course, none of what may come is fixed. Present policies may make alternative futures more likely—such as a more closed US or Europe in terms of migration or trade, accelerating their respective declines in national power and thus accelerating the rise of China and the Global South, yet also rising powers in Africa, particularly Nigeria.

Whether mini-poles—the EU and India—can amount to that status is also a question of governance. In India's case, domestic governance remains a concern as the world's largest democracy struggles to achieve unity. In the EU's case, collective governance that drives coherent and consistent foreign policy is necessary to ensure it can leverage the full weight of its member states' collective national power. Think of a team of horses pulling in the same direction versus pulling in different directions. The former can achieve extraordinary things. The latter can tear whatever it is pulling apart.

By 2050, Africa's [favourable demographics](#) alone will likely not be enough to achieve even the status of mini-pole for any of its individual countries or a collective African Union. The continent's militaries and technologies today are too far behind, and its economy is much too small. Yet the continent's leaders can leverage their countries' increased power to strike more favourable partnerships with Europe, leaning on one

another to facilitate Africa's rise while arresting Europe's decline. They can also look to India—a potential kingmaker in a close bipolar competition between the US and China, and a country which fully appreciates the scars of colonialism. The African Union faces a similar challenge as the EU to act collectively and coherently, though it has much farther to go than its continental counterpart to the north.

An alternative future, which continues recent policies of economic confrontation and actual war, which advances nationalist rhetoric, and which treats migration almost solely as a threat rather than as a potential opportunity if managed correctly, is likely to be one of disarray. It is a bleak picture.

The emerging world order is unlikely to resemble either the Cold War or the brief era of American unipolarity. It will instead be defined by two global poles, a handful of mini-poles, and a growing number of states—including many in Africa—with greater room to shape outcomes than at any point in recent history. Whether that produces greater cooperation or greater rivalry depends less on structural trends than on the political choices governments make today.

Author's Note



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Spotlight 5

How South Africa and the EU can strengthen cooperation on minerals

Dr Melanie Müller

Both the EU and South Africa seek to reshape critical raw materials supply chains. The EU aims to reduce dependencies on China, while South Africa seeks to create jobs. Melanie Müller explains how their interests can be aligned for closer cooperation in the minerals sector.



South African President Cyril Ramaphosa and European Commission President Ursula von der Leyen shake hands at the end of their media conference in Johannesburg, South Africa, November 20, 2025.

© picture alliance / ASSOCIATED PRESS | Themba Hadebe

South Africa is one of the most important European Union (EU) trading partners in Africa. It is also an increasingly relevant partner for the EU in minerals cooperation, particularly because the country possesses raw materials that are essential to European [industry](#).

In November 2025, on the margins of the G20 summit, the EU and South Africa signed a Memorandum of Understanding (MoU) to cooperate on sustainable value chains for minerals and metals. This partnership aims to identify joint projects along all stages of the minerals value chain – exploration, extraction, refining, and [recycling of minerals and metals](#). At the same summit, the South African government and the EU signed the [Clean Trade and Investment Partnership](#) (CTIP), complementing the MoU by providing a broader framework for cooperation designed to facilitate trade and investment in clean

supply chains by identifying and addressing regulatory challenges. Both parties could benefit from long-term cooperation in the minerals sector while further strengthening their economic partnership in areas of shared interest.

While the framework could strengthen the economic partnership, further groundwork is needed to ensure successful long-term cooperation. The main challenge is not only to bring together companies from both sides that share a common commitment, but also to support them in developing bankable projects along the supply chain. Both the EU and South Africa have developed financial instruments that could support innovative projects. They should now also work together to identify synergies and potential gaps in financial cooperation and make these tools more transparent and accessible.

European interests: diversifying supply chains and building new partnerships

Through the [Critical Raw Materials Act](#) (CRMA), the EU has set a goal of securing its supply of raw materials by 2030, against the backdrop of intensifying geopolitical competition. A central objective is to reduce dependence on China, as a significant proportion of these minerals is processed in Chinese smelters and refineries before entering the EU. Mining, however, generally takes place in resource-rich countries, many of which are in Africa. Through the CRMA and new partnerships with these countries, the EU aims to establish direct supply relationships that bypass China. In recent years, more countries have become active in this “[new geopolitics of minerals supply chains](#)”, thereby increasing the competition.

The United States, particularly under President Donald Trump, has taken a transactional approach to securing new [raw materials deals](#). The Gulf states, particularly the United Arab Emirates and Saudi Arabia, are also actively seeking new [raw materials partnerships](#) across Africa.

The EU's raw materials diplomacy must therefore be understood not only as an industrial policy tool, but also in the context of intense [competition among states for cooperation](#) with resource-rich partners. With the CRMA, the EU has succeeded in uniting its member states in a common strategy to secure raw materials.

At the heart of the CRMA are the 17 so-called strategic raw materials, which are essential for the green transition, digitalization, defence, and space exploration. Their global production can only be increased to a limited extent, while demand is growing rapidly. The EU aims to increase the extraction, processing, and recycling of these materials within the EU, while also diversifying its supply relations. According to the goals in the CRMA, not more than 65 per cent of any given strategic raw material should originate from a single third country.

The EU has established various instruments to support its external raw materials policy. In addition to the raw materials partnerships, which are non-binding declarations of intent, raw materials projects can apply to be included on a list of “strategic projects”.

The first list of strategic projects outside the EU was published in June 2025 and included [five projects in Africa](#), including one in South Africa. Strategic projects do not automatically receive financial support, but the designation might help companies access finance more easily. At the same time, the EU has long struggled to develop financial instruments at the European level for the minerals sector. Companies could apply for funding through individual European member states. Global Gateway funding is another option, but it was not specifically designed for the minerals sector and provides only limited funding opportunities for such projects.

In December 2025, the Commission presented the [ResourceEU Action Plan](#) to address this issue. The plan provides for the creation of a European Critical Raw Materials Centre to steer and co-finance strategic projects. It includes a matchmaking mechanism to connect suppliers with EU buyers and facilitate offtake agreements, although its implementation remains a work in progress.

South African interests: green industrialization and local value creation

Several resource-rich states have recognized this geopolitical competition in the minerals sector as an opportunity and are actively shaping their raw materials policies accordingly. Strategies range from [significant intervention](#) in the raw materials sector – such as restricting the export of unprocessed raw materials – to more market-liberal policies.

South Africa is among the resource-rich African states that favours a more market-liberal approach. The South African government intends to reverse deindustrialization in the South African economy and create new jobs in the process. Local value creation is of particular importance for South Africa as the country is confronted with persistently high unemployment.

This is particularly important in the mining sector, as South Africa's energy transition is expected to result in job losses in the coal industry. Green industrialization is therefore also seen as an opportunity to [boost industrial production](#) in various sectors.

Unsurprisingly, the raw materials sector has been identified as one of the key sectors in South Africa's [2026 Industrial Development Strategy](#). Compared with other resource-rich African countries, South Africa has a large, well-developed mining sector and well-established institutions that support new project development. South Africa's Industrial Development Corporation (IDC) plays an important role. The IDC has funded various feasibility studies to expand raw materials supply chains and link them with other sectors. It also provides funding for projects in the raw materials sector itself. These include the "Junior Mining Exploration Fund", designed to support exploration projects in the [raw materials sector](#). Funding opportunities are also available for other parts of the value chain.

The South African Department of Mineral and Petroleum Resources (DMPR) has also published its own [“Critical Minerals and Metals Strategy”](#) in 2025. It sets out an ambition to move from exporting raw materials towards becoming a regional hub for smelting, processing, and advanced manufacturing in the Southern African Development Community. The strategy defines “criticality” according to indicators such as export significance, industrial importance, national-security relevance, and job creation. The strategy has a strong focus on value addition and localization, research and development, and the creation of a skilled workforce.

Building and backing an ecosystem of South African and European companies

The successful implementation of these strategies depends on several prerequisites. South Africa must continue to improve its energy and transport infrastructure, as this is essential for developing and expanding new value-added infrastructure. Although reforms in these sectors are progressing more slowly than planned, continued progress is important for building stable, long-term economic partnerships. The successful implementation of these strategies will also depend on South Africa’s ability to overcome other governance challenges, such as [“limited institutional capacity, regulatory uncertainty, and weak coordination across government”](#).

However, further steps are needed to establish new value chains between South African and European stakeholders. A key joint task for European and South African policymakers is to bring together companies from both regions and across sectors that have complementary interests. In the past, the EU struggled to attract sufficient interest from European companies to engage in these partnerships, or to translate political declarations of intent into concrete cooperation.

Nevertheless, many European companies are increasingly recognizing that long-term investment in diversification pays off, despite higher short-term costs; however, they also need greater political support.

To be successful, such arrangements need to balance the interests of both the EU and South Africa. One advantage is that the EU and South Africa already cooperate in other sectors linked to the raw materials sector, such as energy and health. The task is nevertheless substantial: An ecosystem of companies must be established that brings together, for example, South African mining companies; European and South African processing firms; buyers in South Africa and the EU; and small and medium-sized companies.

These companies must identify bankable projects along the supply chain. A further advantage is that many European companies are already present in South Africa or have economic ties with South African companies, and that German and South African institutions have already tried to bring them together. Such projects can succeed only if they are backed by financial instruments.

Both South Africa and the EU have established funding mechanisms to develop new supply chains. These instruments may even be complementary, enabling projects along the supply chain to receive financial support from both sides. The EU and South Africa should leverage the CTIP cooperation to identify more precisely these opportunities and potential funding gaps, and to make funding opportunities more transparent, thereby increasing the likelihood of successful cooperation.

Author's Note



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Spotlight 6

Agree to disagree: why the AU and the EU should engage in pragmatic partnerships

Dr. Benedikt Erforth and Dr. Lena Gutheil

The AU-EU partnership should embrace the plurality within both unions, make interests transparent, and enable pragmatic cooperation between coalitions of willing countries, helping to bring proclaimed ambitions closer to actual practice, explain Benedikt Erforth and Lena Gutheil.



Heads of state and government from African countries, as well as members of the German cabinet, pose for a group photograph at the 'G20 Investment Summit 2023: German Business and the Compact with Africa (CwA) Countries', Berlin, 20 November 2023.

© picture alliance/dpa | Kay Nietfeld

The relationship between the African Union (AU) and the European Union (EU) is not short of ambition. At every AU-EU summit, a familiar ritual unfolds. In joint declarations, leaders speak of a partnership built on mutual respect, shared prosperity, and common values. The most recent one, issued at the 7th AU-EU Summit in Luanda in November 2025, opens by celebrating ["a unique and strategic partnership that has steadily deepened in scope, ambition, and political significance."](#)

Table 1: Mention of core values in AU-EU summit declarations 2000 to 2025

Declaration	Citation for “Core Values”
Cairo, 2000	“...shared values of strengthening representative and participatory democracy, respect for human rights and fundamental freedoms, the rule of law, good governance, pluralism, international peace and security, political stability and confidence among nations.”
Lisbon, 2007	“...building on common values and goals in our pursuit of peace and stability, democracy and rule of law, progress and development”. The partnership also aims for the “promotion of good governance and human rights.”
Tripoli, 2010	“Our cooperation will continue to build on our common values and goals in pursuit of good governance, democracy and the rule of law. ... We are united in the fight against impunity at national and international level and the protection of human rights on both continents.”
Brussels, 2014	The partnership is “firmly rooted in our shared values of democracy, the respect for human rights, rule of law and good governance as well as the right to development.”
Abidjan, 2017	“We welcome progress in the respect for democratic principles, human rights, rule of law and good governance. ... We recognize the need to increase confidence in democratic processes and will pursue our cooperation on effective, inclusive and accountable governance.”
Brussels, 2022	This partnership includes “the protection of human rights for all, gender equality and women’s empowerment in all spheres of life, respect for democratic principles, good governance and the rule of law.”
Luanda, 2025	“We renew our commitment to democracy, inclusive governance, rule of law, good neighbourliness... human rights, including fundamental freedoms, gender equality, civil and political rights, economic social and cultural rights.”

The ritualistic nature of summits and their declarations is not without value. They bring actors with diverging perspectives and interests around the same table and create a shared language for cooperation. As David Mosse put it, “[perhaps good policy is not](#)

[implementable](#)” – alluding to the way policy documents carefully gloss over seemingly irreconcilable differences. In fact, all policies need to be deconstructed and contextualized before being implemented.

The [gap](#) between a partnership as proclaimed and as practised has become one of the most enduring features of AU–EU relations. Between summits, structural asymmetries tend to reassert themselves: in [migration bargaining](#), in [trade relations](#), in [who sets the terms](#) of investment and in who accepts them. Even though coordination has improved over the years, implementation has lagged behind. Ahead of the 2025 Luanda Summit, the AU and the EU published a [joint monitoring report](#) assessing progress towards the Joint Vision for 2030, but the exercise provided neither a clear target framework nor a comprehensive assessment of implementation, and focused only on selected projects across priority areas.

Hence, what the AU–EU partnership lacks is a structured process that translates its proclaimed unity into focused, manageable alliances among actors with shared interests, enabling differentiated pragmatic implementation partnerships. This requires acknowledging plurality, communicating interests transparently, and demonstrating a willingness to focus, prioritise, and commit.

Acknowledging plurality

The tendency to underestimate the plurality between the two groupings, and to treat the EU or AU as a unified actor, produces unrealistic expectations and obscures the diverse interests, priorities, and constraints that shape decision-making on both sides.

EU member states [diverge significantly](#) in their individual policies toward African countries. For example, [the response of member states](#) to the recent wave of military coups in the Sahel varied in terms of diplomatic engagement, humanitarian assistance, regional stabilization, and disengagement. Differences in geography and legacies of empire, colonialism, and external domination shape positions on migration, security, diplomacy, and development cooperation. Trade remains a notable exception, given the EU’s exclusive competence in this domain.

In a similar way, while the African Union provides an important continental framework, it does not eliminate a diversity of interests, capacities, and strategic outlooks among its member states. Indeed, its [institutions](#) have been deliberately kept relatively weak because member states have been reluctant to transfer meaningful powers to it, leaving the organization dependent on the political will of national governments. Some governments favour a stronger continent-to-continent partnership with the EU, while others remain primarily concerned with reshaping a relationship they continue to view through the lens of colonial legacies. Countries also [engage the EU](#) from very different economic and political positions and can draw on an increasingly diverse range of external partners, including China and the Gulf states. This diversity is reflected in African countries’ [foreign policy choices](#).

A pragmatic AU–EU partnership requires a shift in mind-set that takes into account the internal plurality of both regions, while recognizing the varying degrees of integration, authority, and institutional capacity of their respective supranational organizations. While deeper regional integration is still necessary and desirable, collaboration should not be made dependent on its progress.

Making interests transparent

A second shift is needed toward greater transparency about interests. Values remain an important basis for defining what counts as legitimate and for shaping how political goals are pursued, but interests themselves need to be named more openly, and cooperation built accordingly.

African–European relations have always been shaped by [interests](#), whether economic, political, or security-related. The problem, contrary to what some critical scholarship suggests, is not that interests exist, but that they have long gone unacknowledged. In a sense, transparency also functions as a necessary precondition for addressing structural disparities in wealth, power, and influence between the two. For years, European engagement was presented primarily in [altruistic](#) or normative terms, while African governments were expected to fit into this narrative, despite pursuing their own strategic objectives. Both sides perpetuated an imaginary that was increasingly at odds with the realities imposed by a changing international system. As Europe’s strategic interests became more evident in practice, recurring accusations of double standards, hypocrisy, and hidden agendas became increasingly difficult to dispel.

Greater transparency makes negotiations more equitable. A mutual recognition of Europe’s interest in securing supply chains, critical raw materials, or migration management allows African governments to negotiate from an informed position rather than responding to implicit expectations obscured by normative rhetoric. Since the launch of Global Gateway, the EU has become more explicit about its strategic interests. One can see it in projects like the Lobito Corridor, explicitly framed around [securing critical raw materials](#) for European industry rather than around development outcomes. This is a step in the right direction, but greater candour about interests also requires more thorough strategic coordination and priority-setting across the EU. Equally, as foreign powers [compete to win influence](#) in Africa, African governments increasingly articulate their own interests in industrialization, value addition, partner diversification, and economic sovereignty rather than aid dependency. Transparency, therefore, allows both sides to assess where interests converge, where they diverge, and where mutually beneficial compromises are possible. Ultimately, [transparency](#) strengthens rather than weakens the normative foundations of the AU–EU partnership.

Focusing and committing

The partnership also needs to be more pragmatic about its focus. The AU-EU partnership has long been characterized by an ever-expanding agenda, with new initiatives regularly added without a corresponding effort to prioritise or consolidate existing ones. Former AU High Representative for Partnerships with Europe, Carlos Lopes, recorded no fewer than [52 initiatives](#) aimed at strengthening relations with Africa launched by the European Commission alone between 1972 and 2020. The result has been a fragmented patchwork of overlapping frameworks with limited strategic direction and uneven implementation.

Global Gateway illustrates both the EU's ambition to address this challenge and the difficulty of overcoming it. Designed as a more strategic and investment-oriented offer to partner countries, it has attracted concerns regarding transparency, governance, ownership, and the need for a more demand-driven approach. The broader lesson is straightforward: credibility depends less on announcing new partnerships than on consistently delivering existing ones.

The EU's Team Europe approach, which brings together the Commission, member states and their development finance institutions, has helped coordinate this diverse set of actors. Yet coordination alone does not necessarily produce [strategic coherence](#). As geopolitical competition intensifies, Team Europe could evolve into a more political framework for joint priority-setting and the exploitation of complementary European strengths.

One way forward would be to develop more focused cooperation around specific areas of mutual interest, potentially led by "[thematic champions](#)". Rather than expecting every AU and EU member state to agree on every issue, pragmatic partnerships could bring together those actors willing and able to cooperate in a particular field. This would make it possible to maintain an overarching political relationship while concentrating political attention and resources where there is a realistic prospect of implementation. This also responds to concerns expressed by African officials, who question the value of an all-encompassing partnership that risks becoming too broad to deliver meaningful outcomes.

Towards pragmatic partnerships

Wishing for a unified partnership largely driven by altruism and a commitment to abstract common goods is unrealistic. The AU-EU relationship must instead learn to function in a world in which strategic interests, geopolitical competition and, at times, zero-sum calculations are unavoidable. Yet, this does not preclude meaningful cooperation. The two regions continue to share significant areas of mutual interest from economic transformation and climate action to peace, security, and human development.

The challenge is therefore not to choose between idealism and transactionalism, but to develop a more pragmatic form of partnership: one that acknowledges plurality, makes interests transparent, focuses political attention where interests converge, and accepts that progress will be uneven across policy areas.

If neither the EU nor the AU is a unitary actor, then an effective interregional partnership should not require a comprehensive agreement among all actors as a condition for cooperation. Instead, it should permit differentiated coalitions of actors to cooperate where interests and capacities overlap.

The future of AU–EU relations may consequently depend less on achieving agreement on everything than on learning how to agree to disagree while cooperating where it matters. Pragmatic partnerships would not replace the broader AU–EU relationship. They would make it more credible by connecting its ambitious political language to areas where actors have both the interest and the capacity to deliver.

Authors' Note



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Spotlight 7

Africa's evolving Red Sea security dynamics and implications for Europe

Priyal Singh

Gulf rivalries are drawing African Red Sea states into a new security order, testing continental agency and Europe's regional role.



International commercial shipping traffic along the Suez Canal, one of the main arteries of global maritime trade and of enormous importance to the trade of both Africa and Europe, is subject to the tense security situation in the Bab al-Mandab Strait that has persisted for years. On 25 November 2025, a Celestyal cruise ship sails through the canal in Ismailia, Egypt.

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Ongoing conflict across the Middle East has laid bare shifting regional geopolitical fault lines that are pulling African states into an emergent macro-conflict system anchored along the Red Sea littoral. The emergence of this system stems from the interaction of several overlapping crises arising from US and Israeli military offensives against Iran and renewed Houthi attacks on shipping lanes, Saudi-Emirati competition across the Horn of Africa, and other disputes amongst African states over sovereignty and regional influence. Should these crises deepen and become self-reinforcing, the implications for African states across much of the Red Sea littoral could be dire.

These developments also matter directly to Europe, whose trade and maritime security depend heavily on the Red Sea corridor. They place African states at the centre of an evolving security order in which European and Gulf actors offer markedly different forms of partnership.

Gulf rivalries reshape the Red Sea

The most recent US and Israeli offensive against Iran has added further momentum to these overlapping dynamics. Iran's retaliatory offensives against Gulf actors have called into question longstanding presumptions over the reliability of the US and its security [blanket](#) for its traditional Gulf allies. In turn, these concerns have precipitated more overt [hedging strategies](#) among regional powers, most notably the United Arab Emirates (UAE) and Saudi Arabia, whose prior security coordination to counter Iranian influence has buckled under the weight of opposing conceptions of regional order and claims to regional leadership.

Abu Dhabi is increasingly testing Riyadh's leadership credentials by projecting its power through a networked approach that leverages its expansive investments in ports and strategic infrastructure, alongside its deepening ties to non-state actors and secessionist movements (which actively challenge central state authorities). This has been particularly evident in [Yemen](#), [Sudan](#), [Libya](#) and [Somalia](#) (through the Emirates' support to the breakaway regional administration in Somaliland and the autonomous regional administration in Puntland). Importantly, Abu Dhabi has also deepened engagement with [Israel](#) following its normalisation of relations with Jerusalem under the [Abraham Accords](#).

Riyadh, by contrast, has attempted to [undercut](#) Abu Dhabi's efforts by supporting recognised central state authorities and building countervailing partnerships with like-minded regional actors. In Yemen, for example, this has included pragmatic cooperation with Islah, an Islamist movement associated with the Muslim Brotherhood (while the UAE has maintained a zero-tolerance approach to political Islamist groups). This latter consideration also helps explain Riyadh's willingness to deepen ties with Qatar and Turkey, while compartmentalising earlier disagreements over the threat of [political](#) Islam. At the same time, Riyadh's closer coordination with Egypt, Pakistan, and Turkey can also be read as an attempt to reinforce state-centric regional partnerships, [constrain](#) the UAE, and hedge against Abu Dhabi's close strategic relationship with Israel.

This fluid security environment is particularly consequential for African states along the Red Sea, which can offer access to ports, airfields, intelligence and security partnerships.

African states navigate competing partnerships

As the world's most populous landlocked state, Ethiopia has a structural interest in diversifying access to the sea beyond its heavy dependence on Djibouti. The port of Berbera in Somaliland accordingly remains attractive because the state-owned Emirati logistics company DP World has already developed the port, economic zone, and an Ethiopia-facing transport corridor. But the diplomatic context has changed since the

controversial 2024 Ethiopia-Somaliland memorandum. Under the December 2024 Ankara Declaration, Ethiopia and Somalia recommitted to each other's territorial integrity and agreed to negotiate Ethiopian commercial sea access under Somalia's sovereign authority, with technical talks having begun in February 2025.

This has not, however, removed Ethiopia from Gulf competition. Rather, it has increased the number of actors with an interest in shaping how Ethiopian sea access is secured. Against this backdrop, Turkey has become an important mediator between Ethiopia and Somalia, while the UAE retains deep commercial and political ties with Ethiopia and Somaliland. At the same time, reports in 2026 of training and logistical networks supporting Sudan's Rapid Support Forces (RSF) from Ethiopian territory (reports which Ethiopia and the UAE have flatly denied) have added a further layer of tension with Sudan. Ethiopia's strategic value therefore derives from its market, military weight, corridor ambitions and position between the Red Sea coast and conflicts further inland.

Egypt, by contrast, controls the Suez Canal, possesses substantial military and naval capabilities, and is strategically positioned at the northern end of the Red Sea system. Disruption around Bab al-Mandeb directly affects Suez traffic and Egyptian revenues, while its proximity to instability stemming from Sudan and Somalia is also tied to regional security interests.

Egypt's rivalry with Ethiopia also remains important. Building on tensions over the formal inauguration of the Grand Ethiopian Renaissance Dam in September 2025, Ethiopia has revived plans for three additional Blue Nile dams (namely, Karadobi, Mandaya and Beko Abo), prompting renewed Egyptian objections and structurally locking it into a contested relationship with Ethiopia. This has led Cairo to increasingly pursue actions that seemingly [undercut](#) Addis Ababa's room for manoeuvre, such as opposing Ethiopian sea-access claims and unilateral control over Blue Nile waters, and bolstering ties with Eritrea. All of which has pushed Cairo into a much sharper regional geopolitical alignment with Riyadh.

Sudan's value to Gulf actors and integration into a potential broader conflict system stems from both its conflict and its geography. Port Sudan remains a crucial external gateway for the Sudanese Armed Forces. Foreign weapons, logistics and personnel continue to sustain the war. The UAE faces persistent allegations of supporting the RSF, which it denies, while Egypt and Saudi Arabia have generally maintained closer ties with the Sudanese Armed Forces.

Somalia, on the other hand, is particularly notable against this backdrop given its considerable coastline and proximity to the Bab al-Mandeb. The federal government's decision in January 2026 to cut ties with the UAE was rejected by breakaway Somaliland and autonomous Puntland (as well as Jubaland), all of which have their own Emirati relationships. Turkey, Qatar and Saudi Arabia, however, have deepened engagement

with the federal government, as these actors all pursue their maritime and security interests through rival state authorities.

Europe's role and Africa's strategic choices

Europe is not absent from this security landscape. The EU maintains a substantial maritime presence through Operation [ASPIDES](#), which protects commercial shipping in the Red Sea and Gulf of Aden, and Operation [ATALANTA](#), which covers the western Indian Ocean and parts of the Red Sea. In July 2026, the EU and Djibouti signed a Status of Forces Agreement for ASPIDES, underlining how dependent European naval activity is on African partners for access, logistics and support ashore.

The EU also remains engaged in Somalia through its civilian capacity-building mission ([EUCAP Somalia](#)) and military training mission ([EUTM Somalia](#)), alongside the regional EUNAVFOR Operation ATALANTA. All three mandates currently run until 28 February 2027. EUCAP works on maritime law enforcement and coast-guard capacity in Mogadishu, Somaliland and Puntland, while the wider EU approach emphasises accountable security institutions and maritime governance. This is, of course, a very different model of influence from that used by Gulf powers, where Europe continues to provide public maritime security, training and institutional support, without attaching this to greater access to ports, political patronage and access to strategic infrastructure.

However, the sustainability and long-term attractiveness and viability of this approach should be questioned as African states along the Red Sea are seemingly being pulled into a much sharper geopolitical orbit with rival Gulf powers, on account of the roles they may play within competing regional hedging strategies. The associated strategic premium afforded to these African states will likely continue to reinforce existing Gulf investments in ports, logistics, energy and other strategic infrastructure, while also spurring greater defence and security coordination. Accordingly, commercial engagements may become increasingly intertwined with quid pro quo defence, security, and intelligence-related commitments, as a far more compelling alternative to what's on offer from Europe. However, this will also likely entrench African states within rival security architectures and geopolitical alignments that narrow their room for manoeuvre.

Consequently, African states may have to confront a particularly tricky dilemma sooner rather than later: they can either engage Middle Eastern powers through a more coordinated approach that channels external competition toward advancing a common developmental agenda or prioritise more fragmented bilateral engagements that could provide immediate investment, diplomatic backing and support for pressing security-related concerns.

The latter approach could lead to short-term individual gains; however, this would naturally come at the expense of robust, longer-term, shared developmental gains

(linked to regional integration, industrialisation, and the development of continental governance and finance policy institutions).

A more purposeful continental response could accordingly assign North and East African states a leading role in structuring the continent's engagement with Middle Eastern powers, as their proximity, coupled with the growing strategic premium, provides them with disproportionate access and influence that could be exercised on the continent's behalf.

The central question is whether Africa will harness this new value to advance shared development, or allow it to deepen the continent's fragmentation.

Author's Note



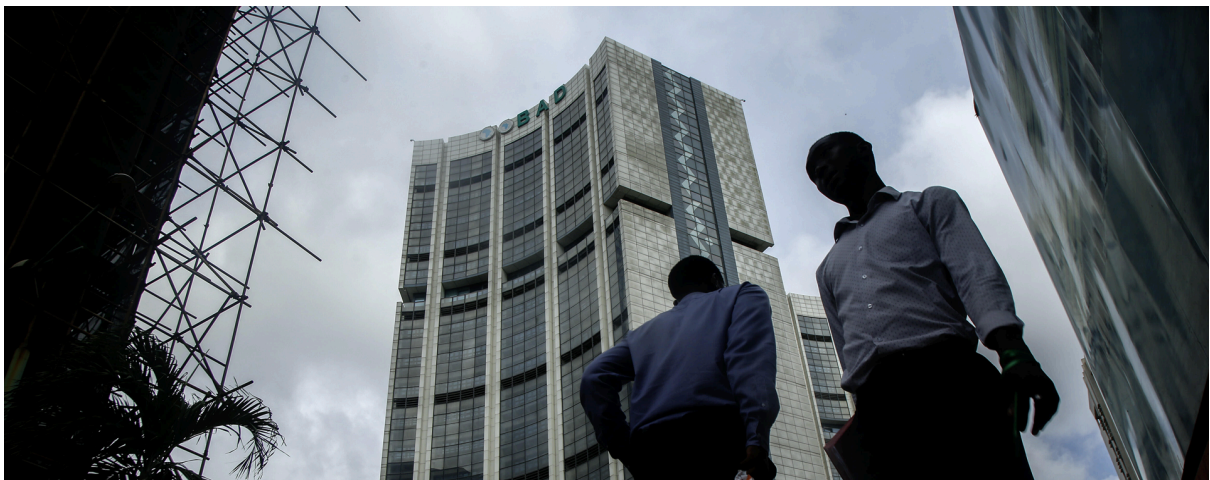
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Spotlight 8

Africa needs better investment, not just more investment

Dr Marvellous Ngundu

Investor rankings tell only part of the story, as both the scale and development impact of FDI matter.



Pedestrians walking next to the headquarters of the African Development Bank (AfDB) in Abidjan, Ivory Coast on May 28, 2025.

© picture alliance / Matrix Images | Joseph Zahui

Investor rankings can mislead

The widely held view that China has become Africa's largest foreign investor risks distorting policymakers' assessments of the continent's investment partnerships. The claim appears plausible because Chinese-built railways, ports, roads, industrial parks and power plants are highly visible. European and US investments are often less conspicuous, embedded in banks, telecommunications, consumer businesses, mining groups and corporate structures. Visibility, however, is not a statistical measure of investment.

The ranking depends on what is measured. Annual FDI flows capture net transactions during a particular year, while FDI stocks record accumulated ownership positions. Greenfield announcements describe planned investments in new facilities or operations, whereas brownfield investment involves acquiring, expanding or upgrading existing assets. Construction contracts measure revenue from delivering projects without necessarily creating a foreign ownership stake.

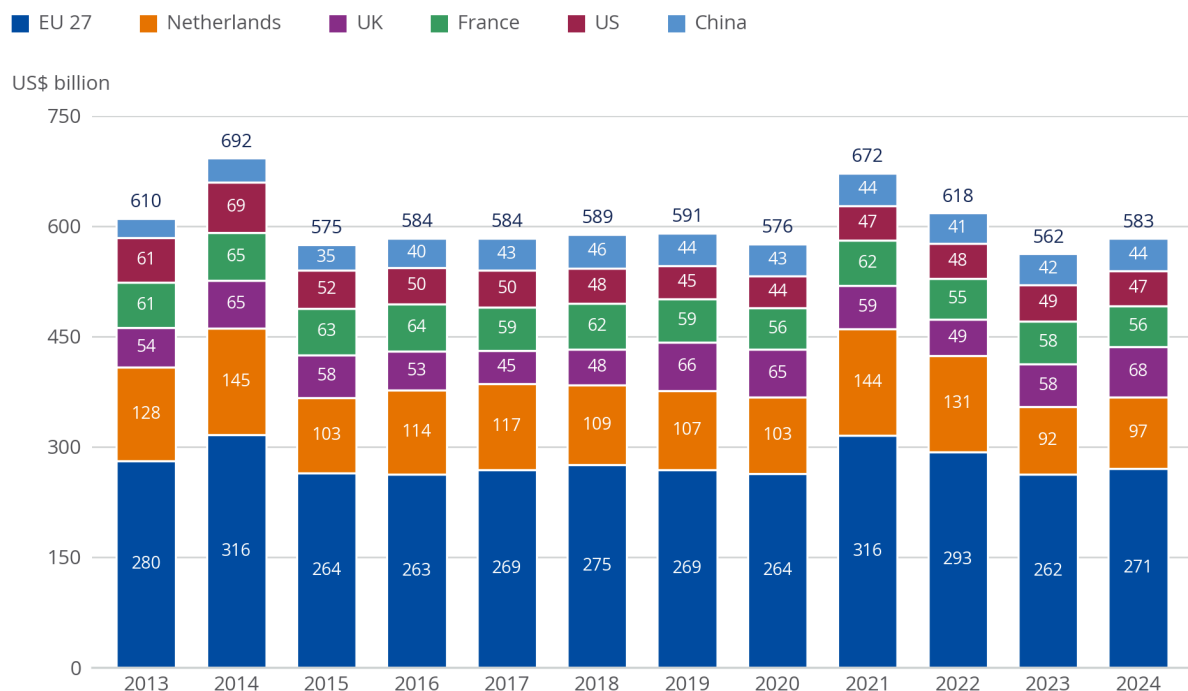
That distinction matters particularly for China. In 2024, for example, China recorded [US\\$3.37 billion](#) in FDI flows to Africa, while Chinese companies earned [US\\$40 billion](#) from engineering and construction projects on the continent. The latter is contract revenue, not FDI. China's combination of investment, lending and contracting makes its economic presence exceptionally visible, but does not make it Africa's largest source of conventional FDI.

European investors retain the largest FDI presence in Africa

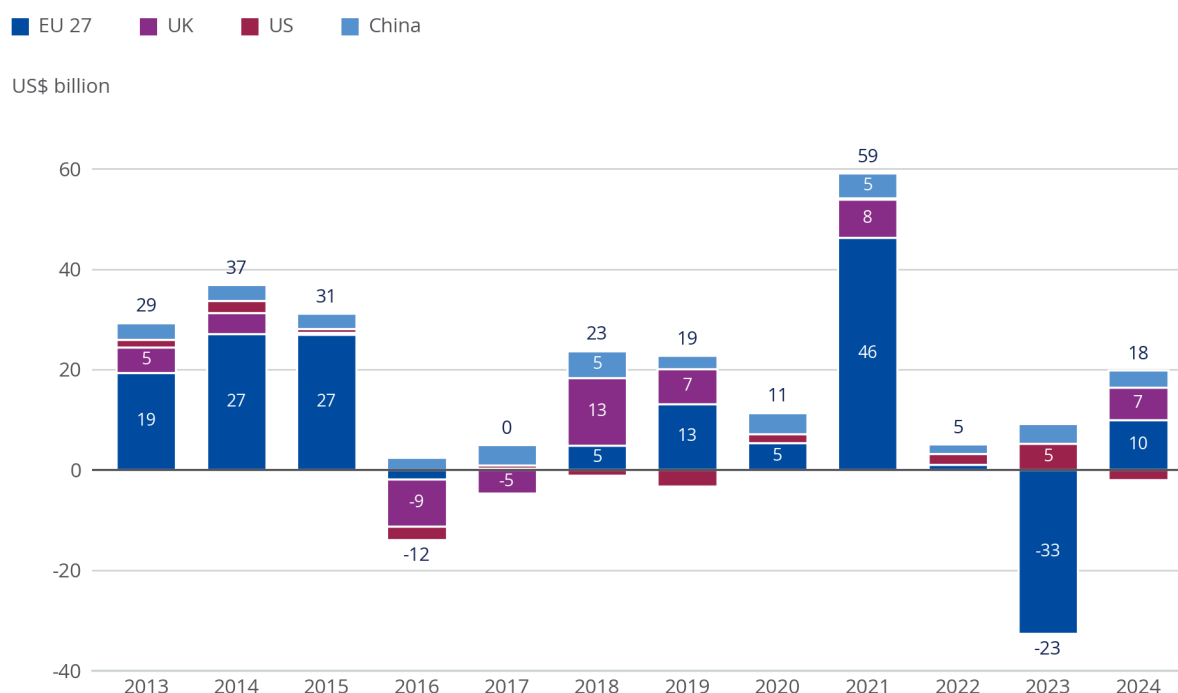
FDI positions (or accumulated stocks) provide a clearer indication of investors' established presence. China's FDI position in Africa increased from US\$26.19 billion in 2013 to US\$43.80 billion in 2024. It nevertheless remained below the US position of US\$47.47 billion. The EU-27 held by far the largest collective position, at approximately US\$270.72 billion in 2024, more than six times China's stock and almost six times that of the US.

Chart 1: FDI stocks and flows in Africa from selected investors, 2013–2024

FDI stocks



FDI flows



Notes: UK FDI inflow values for 2020, 2022 and 2023 were suppressed by the official source for disclosure-control purposes. The UK and EU-27 FDI values were originally reported in pounds sterling and euros, respectively. Annual average nominal exchange rates (euro: US\$ and pound sterling: US\$) were used to convert these values to US dollars for comparability with data for China and the United States.

Sources: EU-27, UK, China and the US

The EU-27 also recorded some of the largest annual FDI flows over 2013–2024, although these were considerably more volatile. US flows were generally modest and frequently negative. China, by contrast, recorded smaller but more consistently positive annual flows. Negative flows may reflect asset sales, intracompany debt repayments or profit distributions rather than the closure of existing operations. Annual flows should therefore be interpreted as short-term financial movements rather than as a measure of investors' accumulated presence.

However, FDI stock comparisons in Chart 1 should be interpreted with caution. Countries such as the Netherlands can act as [intermediate corporate and financial jurisdictions](#), meaning the immediate investing country may differ from the ultimate beneficial owner of the capital. Valuation methods, geographical coverage and the treatment of special-purpose entities also complicate comparisons. Even allowing for these limitations, the available evidence does not support the view that China has overtaken Europe as Africa's largest holder of conventional FDI. In any case, investor rankings are useful for understanding the changing structure of Africa's investment partnerships, but they do not reveal the development impact of those investments. That

requires examining where investment goes, what it creates and how strongly it connects to the domestic economy.

Both the scale and impact of investment matter

Investor nationality tells only part of the development story. The sectoral destination and domestic linkages of investment strongly shape its contribution to structural transformation. China's concentration in construction and mining can help relieve transport and energy infrastructure bottlenecks, expand industrial capacity and generate foreign exchange, but outcomes depend heavily on local procurement, processing, employment and technology transfer. Europe's broader footprint across manufacturing, services, renewable energy and infrastructure may support a wider range of productive linkages. In contrast, US investment in finance, digital services, energy and healthcare can contribute to financial deepening, technological upgrading and higher-value services.

These sectoral profiles highlight distinct development opportunities rather than a simple ranking of investment quality. Infrastructure can reduce production and trade costs; extractives can generate foreign exchange and fiscal revenue; and manufacturing and tradable services can offer wider opportunities for employment, supplier development and technology transfer.

Africa's policy challenge is therefore not to choose between China and its traditional investment partners but to harness competition among investors to increase both the scale and development impact of FDI. This means attracting investment that expands productive capacity, creates better jobs, transfers skills and technology, strengthens domestic suppliers, increases exports and raises public revenue.

The central test should be additionality: does an investment create assets, capabilities and domestic linkages that would not otherwise exist?

Absorptive capacity changes the return from finance

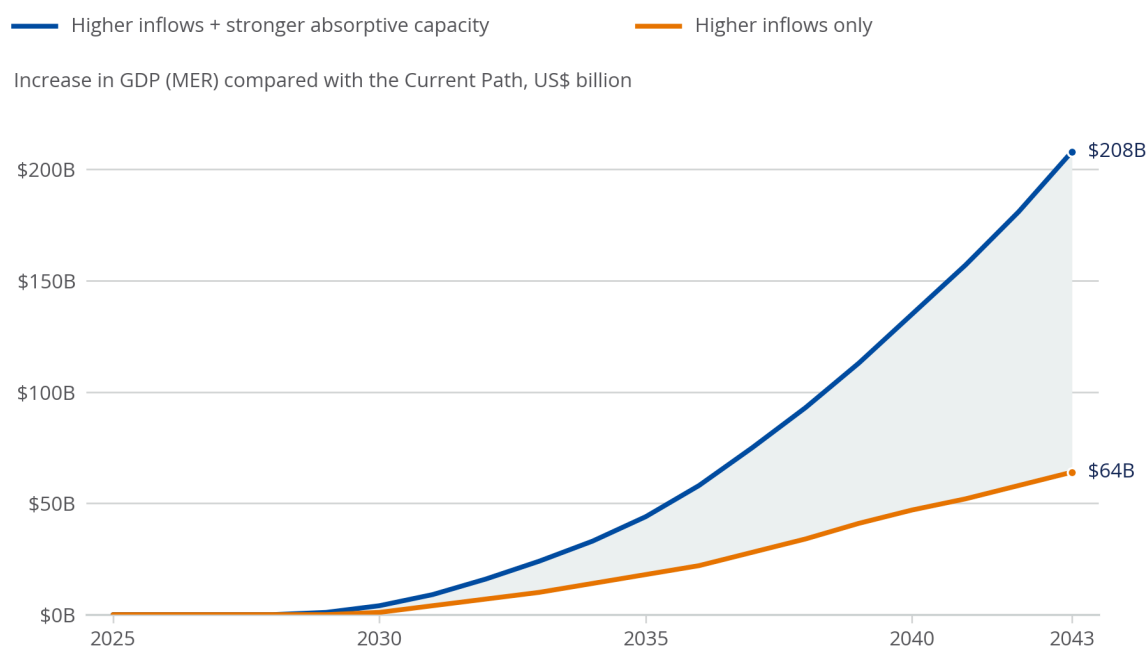
Investment volume and quality are not competing priorities. More external finance can generate development gains, but those gains are considerably larger when countries have the domestic capacity to use additional resources productively.

Investment quality also depends on the capacity of recipient economies to turn foreign capital into productive activity. Infrastructure, skills, effective institutions, domestic suppliers and technology absorption determine whether additional finance generates wider gains or remains weakly connected to the domestic economy.

Scenario analysis by the African Futures and Innovation (AFI) Programme at the Institute for Security Studies (ISS) illustrates the importance of this capacity. In a scenario combining higher FDI, portfolio investment, aid and remittances, increasing external finance without strengthening domestic absorptive capacity raises Africa's GDP by only

about US\$63.7 billion or 0.8%, above the Current Path (baseline forecast) by 2043, the end of the third ten-year implementation plan of AU Agenda 2063. When the same interventions are accompanied by stronger investment efficiency, technology absorption, institutional capability, skills utilisation and domestic productive linkages, the gain rises almost threefold to approximately US\$210 billion or 2.6%.

Chart 2: Increase in GDP (MER) compared to the Current Path forecast per scenario, 2025-2043



Source: IFs version 8.72

The modelling does not imply that foreign finance automatically raises productivity. Rather, it illustrates how much more development could be generated when countries strengthen the domestic capabilities through which additional capital is deployed. Attracting sufficient volumes of investment is essential, but the development payoff is much larger when that investment is converted into domestic productive capacity.

Making FDI work better for Africa

To attract larger volumes of FDI while maximising their development impact, African governments should act on four fronts.

First, improve investment transparency and selectivity. Investment data should identify the ultimate beneficial owner, the financing instrument, the sector and the project status, with announced commitments clearly distinguished from realised investment.

Second, strengthen domestic absorptive capacity. Reliable infrastructure, skills, effective institutions, project preparation and domestic supplier networks can increase technology absorption, reinvestment and local value creation.

Third, link incentives to development outcomes. Investment incentives should be transparent and time-bound, with measurable expectations for employment, workforce training, exports, local procurement and technology transfer. Sector policies should reflect different opportunities: local processing and supplier development in extractives; open procurement and multipurpose infrastructure; and stronger links to skills systems and African value chains in manufacturing and services.

Fourth, deepen domestic financial markets. Stronger banking systems, capital markets and long-term financing can help domestic firms access finance, participate in foreign-investment projects, scale supplier relationships and mobilise local savings.

Effective implementation of the AfCFTA can reinforce these measures by expanding market scale and making regional production and sourcing more commercially viable.

The data point to a more nuanced investment landscape. China has become a major and increasingly important investor in Africa, but it has not overtaken Europe as the continent's largest holder of conventional FDI. More importantly, the development challenge is not to choose between investment quantity and quality. Africa needs both: sufficient volumes of long-term capital and domestic conditions that allow that capital to expand productive capacity, transfer skills and technology, deepen local supply chains and generate public revenue.

Successful FDI, therefore, depends not only on how much capital Africa attracts or who provides it, but also on how much productive value the continent retains from that investment.

Author's Note



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The Future of African-European Relations project explores how the two regions can build stronger partnerships in an era of geopolitical fragmentation, economic competition and shifting global power dynamics.

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