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Maturing Sino–Africa relations

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ABSTRACT
It is argued that China's relationship with Africa has transformed into one defined by a dynamism and African agency, thereby lessening the hold the former previously had on Africa in the early days of this evolving alliance. First, the authors will conduct a literature review of historical Sino–African relations, from the early Han dynasty to its contemporary manifestations. The second section will continue with this analysis by focusing exclusively on the status quo of the Sino–African economic relationship, including analysis of trade flows, investments, development, economic cooperation, and Chinese support for regional integration. Finally, this paper will conclude with an elaboration of some key, emerging relationship areas, such as opportunities for China and Africa to collaborate on the achievement of the latter's Agenda 2063 and African Mining Vision.

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Executive summary

This paper works to unpack the different dimensions of the links between Africa and China, including the 'untold story' of this relationship, which is characterised by evolving Sino–Africa relations in which African states now have an opportunity to build for themselves an increasingly assertive role when it comes to investment and signing trade deals, ensuring that labour, environmental, and human rights are respected. The paper examines the extent to which China holds sway over Africa as it once did, given the emergence of other emerging powers in and outside the continent. In short, it is argued that China's relationship with Africa has transformed into one defined by an emerging dynamism and African agency, characteristics which have the capacity to lessen the hold the former previously had on Africa, if captured and leveraged appropriately. The paper's first section engages in a comprehensive literature review of historical Sino–African relations, from the early Han dynasty to its contemporary manifestations, denoting how these linkages have swayed, evolved, ebbed, and flowed according to domestic interests and international/external pressures. The second section continues this analysis by focusing exclusively on the status quo and contemporary shifts in the Sino–African economic relationship, including analysis of trade flows, investments, development, economic cooperation, and Chinese support for regional integration. The paper then concludes with an elaboration of some key, emerging relationship areas, inclusive of challenges which must be overcome and opportunities for collaboration, thereby

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supporting the resurgence of African agency, interests, and objectives in their relations with China.

Introduction

This paper seeks to help unpack the different dimensions of the links between Africa and China, including the 'untold story' of this relationship, which is characterised, among other ways, by a vast variety of Africans who live in and frequently visit China, as well as an increased flow of African investments and tourists into China. Sino–Africa relations have also evolved to the extent where African states are now faced with an opportunity to take a more assertive role when it comes to investment and signing trade deals, ensuring that labour, environmental, and human rights are respected. The paper will seek to examine the extent to which China holds sway over Africa as it once did, given other emerging powers in and outside the continent. In short, it is argued that China's relationship with Africa has transformed into one defined by an emerging dynamism and African agency, thereby creating points of leverage for lessening the hold the former previously had on Africa in the early days of this evolving alliance.

In its exploration of the relationship between China and Africa, this paper will proceed in three steps. First, the authors will conduct a literature review of historical Sino–African relations, from the early Han dynasty to its contemporary manifestations. The second section will continue with this analysis by focusing exclusively on the status quo of the Sino–African economic relationship, including analysis of trade flows, investments, development, economic cooperation, and Chinese support for regional integration. Finally, this paper will conclude with an elaboration of some key, emerging relationship areas, such as opportunities for China and Africa to collaborate on the achievement of the latter's Agenda 2063 and African Mining Vision.

Evolution of Africa–China relations

China has a long and storied relationship with Africa, in which the historical climax of relations was in the fifteenth century and the Ming Dynasty, when China was at the height of its shipping technology, which facilitated the first direct arrival of Chinese merchant and navy fleets to the continent's eastern shores.[1] Between the Ming Dynasty and the emergence of modern Sino–African relations, contacts between the two were largely the result of transnational trade flows with other merchant civilisations, including the Arab states and Persians.[2] It was not until the founding of the People's Republic of China and the beginning of global decolonisation that Sino–African links would be rekindled. In 1956, Egypt became the first African state to forge diplomatic relations with China, and, for a number of years, Cairo would represent the main base for Chinese operations on the continent.[3] Over the next three decades, Chinese engagement with Africa would be defined as episodic, moving from periods of intense activity in the 1960s and 1970s with the establishment of diplomatic ties to some 36 African states, to outright neglect in the early and late 1980s.[4]

The modern Sino–African partnership can be said to have been born at two points between 1989 and 1993. With the collapse of the Berlin Wall and the end of the Cold War, China became increasingly isolated on the international stage, as diplomatic pressure came both from the West over the events in Tiananmen Square, and from the country's status as one of the last remaining communist governments.[5] Embroiled with a fear of becoming a pariah state, China launched a renewed diplomatic offensive; between 1989 and 1992, then Chinese Foreign Minister Qian Qichen visited 14 African capitals, and aid to the continent was boosted dramatically, particularly to those who had stood by Beijing when it faced international scrutiny in years past.[6] The second defining moment in this relationship was the transformation in 1993 of China from oil exporter to importer.[7] It was recognised by Chinese leadership that in order to maintain its rapid pace of economic growth and development, China would be required to seek and secure stable sources of critical resources.[8] As such, China turned once again to Africa, whose unexploited natural resources (at the time) offered the former state a unique opportunity to guarantee steady inflows of necessary ingredients for its meteoric rise.[9] In seeking to grow the economic dimension of the relationship with Africa, Chinese investments would subsequently grow from $51.19 million USD between 1979 and 1990, to $2.1 billion in 2010 alone.[10]

Measured in purchasing power parity, China stood in 2014 as the world's largest economy, with an estimated gross domestic product (GDP) of US $17.63 trillion. In regards to composition, at 9.7 per cent of total GDP output, China is characterised as the world's leader in gross value of agricultural output. It is also the world's leading economic power in terms of industrial production output, in total nearly 44 per cent of its total GDP.[11] Despite the above two sectors supporting the country's incredible rise to the status of an economic powerhouse, it still ranked 93rd in the world for GDP per capita by the end of 2014. The Organisation for Economic Co-Operation and Development (OECD) notes that the Chinese economy also declined somewhat in 2014 amid an on-going property market correction and a weak demand in upstream industries. Growth has thus been predicted at 7 per cent, slightly down from previous years.[12] Although long-term economic outlook is positive, there is concern that a transition from polluting industries, including coal and steel, will stagnate economic growth in the future. Indeed, when placed in relative terms, China's economy has slumped nearly 35 per cent in the last five years.[13]

China's economy is equally faced with a number of additional challenges: difficulties broaching rising wages, which have facilitated the growth of a domestic consumption economy; the risk of its property 'bubble' bursting, as similarly occurred in 2008 with the US housing market crash; dramatically increasing labour costs in recent years, weakening low-cost manufacturing output; and the quality of products and the environments in which they are produced creating popular concerns amongst China's growing domestic consumer population.[14] In taking real estate as a potential example of difficulties to come, 2014 saw a 4.5 per cent decrease in housing prices, with more than 60 million homes standing empty. Real estate accounts for 25 to 30 per cent of China's total GDP, if upstream and downstream industries including steel, cement and glass are included in calculations.[15] As such, a decline in this sector can have serious, widespread effects on the health of China's economy. The Economist Intelligence Unit argues, however, that despite slowing economic growth, by 2050, China will likely sit comfortably as the world's newest global superpower, with an economy roughly 2.5 times the size of that in the US.[16]

China's Africa policy

China's Africa policy can best be understood from its unique political and economic perspectives. Although China reaps considerable economic gains from Africa, it would be simplistic to regard those benefits as the sole driver of China's policy agenda towards Africa. Indeed, China has often been criticised for taking advantage of the vulnerable dependency of African economies on increased foreign investment to spur development and growth. This perception, however, fails to take into account three important points.

First, China's more active engagement with Africa is part of its continuing emergence as a truly global player and, as such, is no different from the traditional behaviour of major powers. The only major difference is that China's approach to relations with Africa is one based on a pronounced principle of non-interference in the internal affairs of other countries. In this context, China pursues its interests in, and lends support to, Africa without 'strings attached'. Such relations are considered considerably refreshing by some of Africa's political leaders. For instance, in a 2008 article in the *Financial Times*, President Abdoulaye Wade, former Head of State of Senegal, is quoted as saying 'China's approach to our needs is simply better adapted than the slow and sometimes patronizing post-colonial approach of European investors'. In a similar vein, Uganda's President Yoweri Museveni has been quoted as saying that 'when western ruling groups are conceited, full of themselves, ignorant of our conditions'; the Chinese, he believes, are much more business-like.[17]

Second, in its global and regional diplomacy, China, like all great powers, is pursuing multiple objectives, including those that create tensions between values and interests at both the national and global levels. China can no more be expected to subordinate its commercial and strategic interests to other considerations than the Western powers have done in their policies towards Africa and the world. Most African states that have benefited so far from China's increasing trade and investment, as well as from debt relief, are not endowed with mineral wealth and offer few investment opportunities to Chinese enterprises. Ultimately, it is the responsibility of African leaders, not of China, to ensure that their respective countries leverage the benefits and opportunities offered by China's presence in Africa for developing and asserting their own agency while minimising the downside of China's interest in the continent – a policy prescription that holds true for defining the terms of engagement of any external power. Thus, China's Africa policy should be viewed not as a mere quest for resources but, in the context of its diplomatic strategic pursuits and global foreign policy objectives, as an effort to solidify its position as a global power, on a par with other permanent members of the United Nations (UN) Security Council, to sustain its economic and human development, and to ensure Taiwan's reunification while countering secession drives by minority areas within China, including Tibet. In pursuing these objectives, China seeks the political and diplomatic support of UN member countries, particularly less-developed countries. As the largest regional group within the UN system, Africa is a natural ally on which Beijing has become closely dependent to further its political objectives.

China's Africa policy places equally important emphasis on its economic objectives – essentially, the need to sustain China's economic development. Given Africa's vast business and investment opportunities stemming from its rich reservoir of untapped natural and human resources, attractive markets, and low-cost labour, China has ardently strengthened its long-standing relations with the continent over the past two decades, often backed by huge investments aimed at securing these resources. It is widely believed that China's continued economic success will hinge on its ability to tap into Africa's plethora of resources while offering tangible benefits to host economies in the process. Forging a mutually beneficial relationship, as Chinese officials increasingly emphasise in diplomatic circles, has become a major feature of Chinese economic engagement with Africa. And since the establishment of the Forum on China–Africa Cooperation (FOCAC) in 2000, there has been a heightened interest in the relationship between Africa and China by policymakers, the media and academics as the practical impacts of China's engagement with the continent have grown. Countries like China are increasing their focus on Africa. Indeed, FOCAC has provided an institutional platform to promote diplomatic relations, trade and investment between China and African countries. China thus looms large in Africa's field of vision, and vice versa. Africa used to pay attention only to Western countries, but this has changed dramatically. More attention has now shifted to relations with China especially, so as to build such cooperation under conditions of mutual respect and untied assistance, relative to north–south cooperation.

Economic relations, however, are not unidirectional between China and Africa, with the former seeing significant (economic) migration from the latter. Data on African immigration to China is incomplete and vague at best, with estimates being few and far between. Although representative of a regularly unaddressed component of Sino–African relations and not necessarily of burgeoning agency, Bodomo suggested that there are some 500,000 Africans living in China, with 100,000 in Guangzhou alone, and the rest being spread out between Hong Kong, Macau, Yiwu, Shanghai, Beijing, as well as some southern coastal, and middle and northern cities.[18] The composition of this estimate included extrapolated figures of 300,000–400,000 'traders' or those seeking their personal fortune in China, 30,000–40,000 students, 4000–5000 professionals, 10,000 to 100,000 tourists and 10,000–20,000 business travellers.[19] Reports by Al-Jazeera in 2014 suggest that the number of Africans in Guangzhou may be upwards of 200,000, although only some 20,000 have official permanent resident status.[20] In either case, there appears to be more limited movement of persons from Africa to China, as opposed to the latter pathway, which has resulted in conservative estimates of one million Chinese settling in Africa.[21]

Current Africa–China economic relationship: what do the statistics show?

In 2014, Li Keqiang, the Premier of the State Council of the People's Republic of China, published an expansive newspaper editorial survey of what he saw as the characterisation of the relationship between China and Africa. He argued that Africa should be considered a 'pole' in a multipolar world, by virtue of its numerous seats at the United Nations, its vast geographical expanse and natural endowment of resources, and its status as the cradle of human civilisation, the place from which we all came. Li writes that four principles should define the deepening of on-going relations between China and Africa. First, he argues for the treatment of each by the other as complete equals in partnership. He parallels this view with that of a shared history between China and Africa, European colonisation, noting that China's aid to Africa will never be attached with political strings as a result. Second, there should be enhanced solidarity, mutual trust, and a deep respect for one another. Third, the two should jointly pursue inclusive development, with China 'ready and willing' to share its knowledge, experience, expertise and technology with Africa's developing states and its continental integrative organisations, including the African Union. Fourth, the Premier argues that China and Africa's relationship should not be limited to cooperation on energy, resources, and infrastructure, but should be expanded meaningfully into other sectors and areas. He concludes by noting six areas of future cooperation: a China–Africa Regional Aviation

Cooperation Plan, financial cooperation, collaborative poverty reduction, environmental and ecological protection, encouraging cultural exchange, and enhancing peace and security in both regions.[22]

But for all of China's pronouncements and rhetoric about its economic relationship with Africa, what do statistics of such actually show? Today, China is now the single largest trading partner of Africa, accounting for about 15 per cent of African trade, while Africa accounts for only 5 per cent of Chinese trade. African exports to China are mostly natural resources, while China exports primarily electrical and mechanical goods as well as consumer goods to Africa. The proceeding section will regard the breadth of manifestation of Li's idealistic vision of China–Africa relations, explored through the parties' trade and investment patterns, as well as their linkages to the African development agenda.

Trade and investment flows

For more than a decade, China has sought access to Africa's rich energy and raw materials to fuel its surging economy. The country's booming domestic energy demand, coupled with insufficient coal output and falling domestic crude oil production, prompted China to look overseas for stable supply sources. A turning point came in 1993, when China went from a net exporter to a net importer of hydrocarbon products. By late 2004, the country had become the world's second-largest oil consumer, at 5.46 million barrels a day (bbl/d), outstripping Japan's 5.43 million bbl/d, and placing it behind only the US's 19.7 million bbl/d.[23] Over the past decade, China has doubled its oil consumption and is largely responsible for increasing the share of global oil used by non-OECD states from 37 per cent in 1997 to almost 43 per cent in 2007.[24] China surpassed United States as the world's largest consumer of energy in 2009, with oil accounting for less than one fifth of that amount.[25] Its energy demands are expected to rise by 150 per cent by 2020.[26] Energy experts point out that China's oil imports from Asia's oil-producing states have not been sufficient to meet even its current energy demands, while Chinese officials remain aware of the limitation of Middle Eastern oil and gas production given its primary allocation to European and US markets; this has led to a shift of interest towards Africa. By 2014, China imported 23 per cent of its crude oil from Africa, with its largest supplier states being Angola, Equatorial Guinea, Nigeria, the Republic of Congo, and Sudan/South Sudan.[27]

In 2010, China–Africa trade volume increased to US $114.18 billion,[28] making China the continent's largest trading partner.[29] In 2014, trade between Africa and China was worth US $221.5 billion, with imports (from China) and exports accounting for US $105.8 billion and $115.7 billion, respectively.[30] This constitutes an increase of about 75 per cent in Sino–African trade volume from 2010. Additionally, Chinese foreign direct investments (FDI) to the continent increased from US $1.5 million in 1991[31] to US $20 billion in 2012.[32] The reorientation of China's economy towards trade over the past decade and a half has dramatically increased its trade-to-GDP ratio in excess of 70 per cent. China has become a major importer of commodities and a significant exporter of manufactured goods. From 1995 to 2009, China's imports from Africa increased by 27 per cent.[33] "China and Africa." In 2009, China's top imports from Africa included mineral products (79 per cent), base metals (5 per cent), and precious stones and metals (4 per cent).[34] The share in total Chinese imports from sub-Saharan Africa of five of the most highly sought commodities – oil, iron ore, logs, diamonds and cotton – grew to more than 80 per cent in 2005, up from less than 50 per cent in 1995. Chinese exports to Africa tend to be composed similarly to Chinese global exports, with mechanical and electrical products accounting for 45.9 per cent of China's total commodity exports to Africa.[35] Africa's exports to China are mainly (> 85 per cent) natural resources, the vast majority of these petroleum, followed by iron ore and copper.[36] In contrast, most of these countries' imports consist of manufactured products, including machinery, transport equipment and handicrafts.[37] 33. Chemical and food products account for less than 10 per cent of total Chinese goods imports by African states.[38]

Indeed, the share of manufactured goods in exports to China (3 per cent) is very low even compared to exports to other countries. Exports of African countries to other African countries have a 40 per cent share of manufactured goods, while the figures are 16 and 12 per cent for exports to the EU28 and the US, respectively. These numbers suggest that there is potential for African countries to move up the value chain in their trade with China, supported by a recently manifested continental manufacturing boom, with domestic manufacturing in Africa nearly doubling over the last 10 years. EIA, *Annual Energy Outlook*. Examples abound in this regard, including the following: H&M, a multinational Swedish retail-clothing firm, and Primark, an Ireland-based one, source a lot of material from Ethiopia; General Electric is building a $250 million plant in Nigeria to manufacture electrical gear; Madecasse Chocolatier is looking to add to its 650-person workforce in Madagascar turning raw cocoa into premium chocolate products; Mobius Motors, a Kenyan firm, is building cheap, durable automobiles for rough roads; Seemhale Telecoms of South Africa is planning to make cheap mobile phones for the African market; Angola is looking to build domestic weapons manufacturing prowess with help from Brazil; and Ali Lamu makes handbags from recycled dhow sails on the Kenyan coast and sells them on Western websites.[39]

KPMG argues that boosting Africa's manufacturing sector, which it sees as an ideal industry to drive the continent's development, particularly through subsequent intra-African trade, can have a number of positive repercussions. First, as there is a direct correlation between export levels and the economic success of a country, increasing added value prior to selling products via concentrated processing and manufacturing of commodities would thereby boost revenues and raise average earnings per input. Second, the manufacturing sector is more stable and less susceptible to market volatility than a commodities-driven economy is. Third, a strong manufacturing sector contributes to the development of the private sector, which, again, insulates a state from external price shocks. Fourth, producing goods to supply, in particular, a domestic market has a positive impact on the balance of trade with external actors, with manufacturing goods having a much wider scope than commodities. Subsequently, this may boost intra-African trade, which would subsequently create cross-border value chains, allowing for the development of specialised domestic product sectors, thereby contributing to a new cycle of industrialisation.[40]

For China, trade with an aggregated Africa accounted for only 5.2 per cent of total trade in 2014 (see Table 1).

The impact of China on African trade will vary according to the diverse size, economic structures and quality of governance and institutions in African economies.[41] Indeed, the evidence above would point to a conclusion that the impact of China's current approach to trade would be most pervasively felt in resource-rich economies that benefit extensively (and exclusively) from China's demand for raw materials, while it will be felt minimally in economies which have successfully diversified.[42] It is important to recall that Africa is not a homogeneous entity, but a collection of 54 individual states with different histories, resources,

Table 1. Top five African trading partners with China.

Country	Total trade with China 2014 in USD millions (share of total)	Imports from China 2014 in USD millions (share of total)	Exports to China 2014 in USD millions (share of total)
South Africa	60,271 (27.2%)	15,700 (14.8%)	44,571 (38.5%)
Angola	37,081 (16.7%)	5975 (5.6%)	31,106 (26.8%)
Nigeria	18,052 (8.1%)	15,394 14.5%)	2658 (2.3%)
Egypt	11,620 (5.2%)	10,461 (9.9%)	1159 (1.0%)
Algeria	8710 (3.9%)	7395 (7.0%)	1315 (1.1%)

Data source: United Nations, *Commodity Trade Statistics Database*.

needs, and models of government. While many African economies have reaped significant short-term benefits from China's rapid growth and increasingly important trade links with the continent, the impact of that country will likely depend most readily on the commodity specialisation of each partner state, the strength of resource management frameworks and governance, economic diversification, and the creation of an equal footing for negotiation with China.[43]

Development and economic cooperation

In terms of FDI, China's commercial activities on the continent are qualitatively different from those sourced from North America or the EU. Chinese FDI is directed by partially or wholly state-owned enterprises, which are strategically placed with the objective of forming long-lasting relationships with the communities and governments with which they cooperate, assisted in part by their ability to access national sources of capital. In addition, a large number of these investments are linked either implicitly or explicitly to national strategic objectives, principally securing reserves of mineral resources for Chinese industries back home. However, there is also a significant element of private profit-driven FDI from China, and profitability is far from being irrelevant even for state-owned enterprises.[44] This is not to say that Chinese FDI has produced tangible benefits only for Chinese manufacturing and for China's economy at large. Chinese investment not only enjoys the support of African governments – particularly in the agriculture sector, as a way of securing the food needs of their populations – but also is seen as a means of helping Africa move around restrictions imposed by the World Trade Organization (WTO).

Indeed, in recent years, Chinese state-owned entreprises (SOE) have invested billions of dollars of foreign reserves and used Chinese construction and engineering resources to assist Nigeria, Tunisia, Angola, Sudan, Gabon, and Algeria, among many other African countries, to develop their oil, gas, and other mineral resources, which could provide material needs for the reassertion of African agency. In March 2004, for example, China's Eximbank extended a US $2 billion loan to the Angolan government in exchange for a contract to supply China with 10,000 barrels of crude oil per day.[45] The loan was designed to be reinvested in infrastructure construction, with approximately 30 per cent going to local subcontractors but the bulk expected to go to Chinese companies. The agreement was part of a reported offer, estimated at US $12 billion, which came with long maturities and low interest rates.[46] At the time, the government in Luanda had been under intense pressure from the International Monetary Fund (IMF) to improve transparency and management issues with respect to its oil revenues, since the poverty-stricken population of Angola had seen very little of the windfall of foreign reserves that had accompanied increased FDI in the oil sector. Since the end of the civil war in 2002, Angola had been negotiating with the IMF to establish a formal financial arrangement designed to give the government access to lending facilities, but the negotiations fell apart over the issue of revenue transparency. This Chinese loan has since undermined the IMF's leverage altogether. In Sudan, Chinese companies have invested more than US $20 billion, largely in the oil sector,[47] helping Sudan to go from a net importer of oil to one of Africa's largest exporters. In West Africa, Petro China signed a memorandum of understanding with African Petroleum Corp (APCL) on July 2012, reported to be worth US $1 billion. Petro China offered to acquire 20 per cent of the LB-09 block Share in Liberia and as much as 20 per cent in APCL's exploration blocks in The Gambia, Côte d'Ivoire, Liberia, Sierra Leone and Senegal.[48]

Indeed, energy analysts credit China's success in securing mineral rights in Africa to a wide range of economic instruments, particularly prestigious construction projects, financial assistance, and arms sales to cement ties with oil-producing states. In Sudan, for instance, Beijing had used its technical expertise and links to other government-owned companies to transform the country's oil industry into a major export earner for Khartoum. Since the separation, China has spent considerable effort in building diplomatic and financial ties with both Khartoum and Juba, owing to the fact that many of its resource investments are now split between the two states. As a result, in the first 10 months of 2013, China had imported 1.9 million tons of oil, or twice as much as it receives from Nigeria, from South Sudan alone.[49] As fighting has continued in South Sudan's violent, but oil-rich, Northern region, China has also pledged to send a peacekeeping force of 850 soldiers, both to calm warring parties and to protect its own commercial interests.[50] And, with US $519 million in loans from the China Exim Bank, the Merowe hydropower dam was completed in 2009, doubling Sudan's electricity generation, but also resulting in a number of negative social impacts, including the displacement of 50,000 inhabitants.[51]

Assisted by low labour costs and strong capital backing, as well as assistance from the Chinese government, Chinese companies have been able to outbid Western firms for infrastructure project contracts across the continent, particularly in East and Southern Africa, resulting in nearly 2000 new investing firms.[52] Examples of such include the investment by Qingdao Municipal Government in Zambia's textile industry, where the newly created Mulungushi Industrial Park in Kabwe aims to take advantage of the African Growth and Opportunity Act (AGOA) provisions that allow Zambia to export textiles duty free to the United States.[53] In 2011, China signed an agreement to provide Cameroon with more than US $743 million to help fund a water-distribution project including construction of pipelines.[54] In Mali, in early 2010, in a deal worth US $210 million, China Road & Bridge Corporation (CRBC) along with several other Chinese corporations agreed to invest in Mali's transportation and information and communications technology (ICT) sectors. Mali has also signed a string of investment deals with China totaling US $11 billion: US $8 billion would finance a 900-km railway to Guinea's port capital of Conakry, and US $1.5 billion would renovate a rail link to Dakar.[55] Notable, as well, is a Chinese-backed Bamako-to-Segou highway project, and Bamako Bridge among others.[56] Beijing's economic support equally remains strong in Zimbabwe, and Chinese firms have secured contracts to develop the country's agricultural, mineral, and hydroelectric resources.

Table 2. Estimates of Chinese development finance to Africa.

Source	Year	Amount per year (USD)	Flow type***
Bräutigam (2011a)	2007	1.4 B	ODA
Wang (2007)	2004–2005	1–1.5 B	ODA
The Economist (2004)	2002	1.8 B	ODA
Lum et al. (2009)	2007	17.96 B	Aid and related activities
Christensen (2010)	2009	2.1 B	Aid
Lancaster (2007)	2007	582–875 M*	Aid
He (2006)	1956–2006	5.7 B**	Aid
Kurlantzick (2006)	2004	2.7 B	Aid
Fitch Ratings (2011)	2001–2010	67.2 B	EXIM bank loans
Alden and Alves (2009)	2006	12–15 B	EXIM bank loans
Harman (2007)	2006	12.5 B	EXIM bank loans
Christensen (2010)	2009	375 M	Debt relief

*Authors' calculations based on mid-point of the estimated range of total Chinese aid ($1.5–2B), and the estimated range of Africa financing (33–50%).
**Authors' estimation for the entire 50-year time period.
***"Overseas Development Assistance"; EXIM – "Export-Import."
Source: Strange, Susan et al. "China's Development Finance to Africa: A Media-Based Approach to Data Collection." Center for Global Development Working Paper 323 (2013): 15.

China's development assistance

Tangible examples of modernisation,[57] such as Chinese-built stadiums, highways, or foreign ministry buildings, have resonated well with African leaders who seek to portray their legitimacy to their populations, who are often dissatisfied and frustrated with the slow pace of reform and economic development or have little patience for the rhetorical proclamations of prosperity in the near future. Technical development assistance to Africa, though still less than official development assistance from the West, is slowly becoming a bargaining chip China can use to further its economic engagement with the continent.

Unfortunately, however, official statistics on China's foreign development assistance and aid, particularly regarding its scale and scope, are limited in public availability as the country, unlike those in the OECD Development Assistance Committee (DAC), does not release detailed, project-level financial information about overseas development aid activities.[58] This has caused significant confusion in policymaker and academic estimates on aid flows to Africa, as can be seen in the range of estimates in Table 2 below.

In its inaugural white paper on its development activities, China reported it had provided a total of 256.29 billion Yuan (US $38.54 billion) in aid to developing countries by the end of 2009. This included 106.2 billion Yuan in grants, 76.54 billion in interest-free loans and 73.55 billion in concessional loans.[59] Additionally, China cancelled 25.58 billion Yuan in debt to the developing world.[60] While the white paper did not specify how much was allocated to Africa, in 2009, other Chinese government sources suggest 45.7 per cent of China's aid went to Africa.[61] It is estimated that from 1950 to 2011, Chinese aid to Africa totaled US $11.5 billion, while RAND and the Congressional Research Service argue that of the US $74.7 billion in total Chinese aid to Southeast Asia, Latin America, and Africa between 2002 and 2007, 44 per cent went to the latter.[62] Strange et al. counter that in cataloguing 1422 Chinese aid (non-investment) projects in Africa, to some 50 recipient countries between 2000 and 2011, of which 62 per cent provided information on committed financing, it appears that China has committed over US$ 75.4 billion to the continent.[63]

In July 2012, at the fifth summit of the Forum on China–Africa Cooperation, China further pledged to offer the continent US $5 billion in development funding in addition to US $20 billion in the form of a credit line. China has also agreed to provide US $2 million annually through a United Nations Educational, Scientific and Cultural Organization (UNESCO) trust fund to support charitable programmes, particularly higher education initiatives, on the continent. In Liberia and Mozambique, China signed memos cancelling all debt owing to it by these states – an amount that jointly totaled more than US $30 billion. In Liberia's case, Beijing introduced a tax exemption policy for all imports from Monrovia. In 2011, the Chinese government pledged US $16 million in humanitarian contributions to Somalia.[64] In both Liberia and the Central African Republic, China provided direct funding for training programmes to strengthen the capacity of the civil service in those countries. In areas of small-scale agricultural production and hydro-irrigation, China has supported training programmes involving thousands of farmers across the continent.

According to China's Information Office of the State Council's White Paper on China–Africa Economic and Trade Cooperation, China's development assistance to Africa also comes through the promotion of integration and continental unity.[65] The White Paper notes that since 2011, the Chinese government has signed framework agreements with the East African Community and the Economic Community of West African States (ECOWAS) to explicitly expand and support cross-border infrastructure construction, while it has become a non-regional member in several regional and continental organisations including the African Development Bank, the West African Development Bank, and the Eastern and Southern African Trade and Development Bank.[66] China has also actively supported the African Development Fund's Multilateral Debt Relief Initiative for poverty reduction and regional integration on the continent.[67] The report's authors proposed that for its goal of facilitating African regional integration in the future, China will need to establish an overall economic, political, social and cultural partnership with Africa that is focused primarily on transnational and trans-regional infrastructure development, support related project planning, and the encouragement of Chinese companies and financial institutions to take part in similar cross-border and borderless development.[68]

Most authors point to Chinese investment in infrastructure as the primary vehicle through which it can play this role. Indeed, some of the main challenges for further African integration and economic growth include inadequate transport, telecommunications and power.[69] There are indications that this shift may already be occurring. In October 2012, China signed an agreement with ECOWAS for cooperation in infrastructure development, trade, and investment.[70] While the agreement aimed at encouraging business cooperation, information exchange, bilateral training, and investment in key natural resource industries, a key feature was the stimulation of infrastructure development, particularly in the support of a trans-West African coastal highway from Dakar to Lagos.[71] In ECOWAS states, Chinese infrastructure investment has notably been driven by a parallel expansion of resource extraction agreements, whereby the fulfilment of the latter has required the support of the former, including the upgrading of core power and transportation links in the region.[72] At the continental level, China has repeatedly made note of its desire to support African integration, while physically manifesting this objective by funding the construction of the African Union's (AU) new headquarters in Addis Ababa.[73] In January 2015, China signed a memorandum of understanding with the AU to support the development and construction of a new generation of road, rail and air transport links between capital cities across the continent.[74] As well, 2014 marked the first meeting of the China–Africa cross-border and cross-regional infrastructure construction joint working group, through which the two sides are said to have carried out extensive discussions on Africa–China connectivity infrastructure cooperation, as well the possible building of 'a new platform for Chinese enterprises to participate in African economic integration'.[75]

Working together – future partnership dynamics and prospective difficulties

Africa has a clear vision of how it would like to progress towards the future: achieving its Agenda 2063, the establishment of a Continental Free Trade Area (CFTA) by 2017 (indicative date), achieving commodity-led industrialisation, and the realisation of the African Mining Vision – all of which remain at the heart of Africa's path to structural transformation and diversification. The Agenda 2063 declaration signifies Africa's determination to take all necessary measures, using the continent's natural endowments and human resources, to transform the continent and make it a leading player in innovation and creativity. Additionally, it affirms the African Mining Vision, adopted by African leaders in February 2009, to shift African economies from reliance on extracting and exporting of raw minerals to more value-added, resource-driven and broad-based growth, industrialisation and development strategies.

Therefore, under these goals and agreements, are there specific, emerging opportunities for China and Africa to work together for the achievement of Agenda 2063, a continental free trade agreement, and the full realisation of the African Mining Vision? Let us broach each in turn.

Agenda 2063

As noted, the AU's Agenda 2063 is comprised of aspirational goals that the pan-continental organisation and its member states seek to achieve by the year 2063. Of those seven objectives, several have immediate relevance to the current definition of the bi-directional relationship between Africa and China. First, China has an evident role to play in the achievement of Goal 1, namely 'a prosperous Africa based on inclusive growth and sustainable development'.[76] While much of the current discussion on this relationship revolves around a new scramble for African natural resources, led primarily in recent years by Chinese firms, China's technical and financial capacity, as well as its experience with rapid urbanisation and economic growth, will undoubtedly be crucial for partner governments which are grappling with the outcomes (intended or otherwise) of exogenously supported development. China's National Report on Sustainable Development makes several references to the importance it places on supporting other countries, in particular in efforts of poverty reduction by providing debt reduction, financial and technical assistance.[77]

China has also sought to work with the United Nations and other development organisations to establish centres for knowledge exchange and learning in African states, exemplified by the China–Africa Environmental Centre of the United Nations Environmental Programme in the Republic of Congo, and the Light Up Africa project, through which China sends electrical and power experts to provide training and advice on energy conservation and rural electrical planning, building a local technical knowledge community in this regard.[78] It will be up to African states, however, to translate these training opportunities afforded by external powers into local capacity, or risk losing an opportunity to develop the continent's knowledge agency.

The Agenda 2063's second and seventh goals, an integrated continent which is politically united and based on the ideals of Pan-Africanism and a vision of an African Renaissance, and the continent as a united and influential global player and partner, respectively, have already been discussed above in the context of Africa–China relations. China makes no secret of its support for African integration: through its infrastructure development platform, China has also offered to help fund the Agenda 2063.[79] Much of this falls under what China sees as a 'win–win' policy for Africa, whereby Africa would be poised to benefit from enlarged business opportunities, and China would be provided opportunities for its companies to secure resources, squeeze out competition, and expand operations overseas.[80] Equally, regional economic communities (RECs) are seen as being able to promote market-friendly policies, leading to improvements in the productivity of China's investments.

For Africa, RECs help harmonise national infrastructure investment plans within a regional framework, leading to economies of scale, which subsequently translate into more affordable prices for businesses and consumers alike, ultimately bringing down production costs and improving the continent's international competitiveness. Integration in the power sector can create continental energy markets with coordinated supply systems, thereby providing a partial remedy for a critical state infrastructure needed to support development.[81] Empirical research indicates that Africa's infrastructure deficit is lowering the continent's per-capita economic growth by 2 percentage points a year, and reducing the productivity of firms by as much as 40 per cent.[82]

Indeed, a United Nations Economic Commission for Africa (UNECA) empirical study suggests that complementing the establishment of the Continental Free Trade Area with trade facilitation measures capable of doubling the efficiency of ports and customs in handling imports/export could double the share of intra-African trade by 2022.[83] The problem, however, remains that infrastructure development is extremely expensive, particularly in difficult geographical and climatic conditions.[84] For those states with limited financial capacity to fund such projects, integrated approaches and co-financing partnerships are an obvious alternative, provided that they do not come with attached provisions which may stagnate growth in other areas. China may very well be poised to be a critical ally in Africa's attempts to integrate infrastructure development efforts, so as to support future increases in economic output and, thus, improve the continent's position as an influential global player and partner.

Continental Free Trade Area

In 2008, the heads of state from the Southern African Development Community, the East African Community and the Common Market for Eastern and Southern Africa agreed to establish the continent's largest free trade zone, comprised of 26 countries with an estimated combined $624 billion in total GDP.[85] Four years later, the African Union announced plans to create a Continental Free Trade Area, designed to boost intra-state trade by between 20 and 30 per cent over the next decade.[86] The AU believes that the failure of African trade to serve as a catalyst for sustainable economic growth across the continent, as well as acting as a driver for poverty alleviation, stems partly from three basic features: Africa's global trade contribution is largely insignificant, for its export sector is heavily concentrated on primary commodities; Africa's economic growth has been primarily (and almost exclusively) dependent on an external orientation; and, while Africa has been involved in a number of international trade negotiations, many have stalled, requiring the continent to look at alternative arrangements to boost its economic growth.[87] A continental free trade agreement is one such option.

If China is to be a strong partner in this regard, however, there are several lessons for an improved partnership, which can be garnered from the experience of Chinese support for Nigeria's Lekki Free Trade Zone. First, so long as a country, region, or even a continent is viewed as a 'high-risk' investment destination, investors, including Chinese companies, will enjoy strong leverage, enabling them to dictate relationship terms that may be decidedly suboptimal for African partners.[88] Thus, African states must work to repair both actual stability in investment destinations, and a perceived 'brand' of uncertainty, so as to better position themselves as partners on equal footing with China. Second, a lack of investor confidence in Africa's ability to effectively run a free trade area, as well as a diminished pool of potential partners beyond China, may sometimes lead to African states offering over-generous deals.[89] Third, the success of a free-trade agreement may rest on factors including political commitment at the highest level, proper implementation of a regulatory framework, and a conducive business climate, including adequate infrastructure.[90] China could effectively provide the needed support for the realisation of this third set of conditions, so long as African states ensure that the achievement of the above is not inhibited by Chinese interest in obtaining a positional advantage in brokering economic arrangements with partners.

African Mining Vision

The African Mining Vision (AMV) is a continental agreement signed in 2009 to encourage the development of transparent, equitable, and sustainable growth supporting extractive industries in Africa. As China continues its rapid economic rise at home, and its appetite for natural resources to fuel its expansion becomes insatiable, is there a place for a dynamic Sino–African relationship in the fulfilment of the AMV?

For Shaw, the AMV represents the most advanced articulation of emerging African agency in the international arena, agency that itself is a determined response by the continent's developmental states to the gains rather than costs of the discovery of Africa's natural resource potential by Brazil, Russia, India, China and South Africa (BRICS).[91] The AMV itself notes that the rise of China and India in particular as resource markets and investors has given African states more options than were available in the old Western 'hegemony' .[92] However, as of 2013, indications suggest that the AMV has thus far not been echoed in China's Africa policy discourses and cooperation frameworks, despite the latter state's overtures of support for a sustainable approach to extractive industries on the continent.[93]

Thus, there are a number of areas in which China and Africa can collaborate on the fulfilment and effective realisation of the AMV. First, both actors can work to provide technical and scientific cooperation among academic institutions, governments, and industry so as to promote mineral skills, development, knowledge mobilisation, local beneficiation, and geological research. Second, China can collaborate with African states to build more transparent and accountable principles for operation in natural resource extraction by public and private entities. This would allow for the establishment of an improved operating environment for Chinese firms, one that is open, stable, and predictable. Third, China should endeavour to convert its commitment to long-term sustainability and economic development in Africa into concrete measures, a task which could be partially aided by the engagement of

China's policy banks in supportive mineral development projects that aligned directly and meaningfully with the AMV. By involving itself in the above three goal sets, China could seize an opportunity to help develop and frame an actionable AMV agenda that supports its own economic and foreign policy goals, while leaving a lasting, global legacy for other prospective partners of its ability to adhere to a mandate of social responsibility in its international relations with Africa.[94] From an African perspective, encouraging China's involvement in framing and implementing the AMV and its associated action plan, not only allows for the continued development of a deep-seated partnership, but it provides improved assurances that in broaching economic relationships with China, the long-term ecological health, economic sustainability, and continental objectives are consistently employed as the base upon which those links are conceived and manifested.

China's shifting focus – what the future may hold for Africa

Over the last decade, China–Africa relations have been primarily dictated by China's interest in Africa's natural resources, and its ability to support that interest with a cash-for-resources policy. Going forward, however, it will become increasingly critically for African leaders to leverage their own agency and take ownership of this relationship by articulating a unified China policy, whilst pushing for the translation of Chinese rhetoric into action, so as to maximise their potential benefits and dividends.[95] There is also a sense of urgency in the need to shift Africa's relationship with China; in the past, China has sought to use Africa as a raw material source to fuel its own growth, but now that it has emerged as an economic superpower, its interests will likely begin to change, thereby limiting the effect of any possible resource-based leverage that African states may still hold.[96]

The rebalancing of China's economic growth, however, presents transformative opportunities for Africa to climb higher on the value chain through greater beneficiation and processing of its ores. As a result of commitment towards diversification of their economies, African countries have been able to weather the falling prices of commodities, unlike in the past. While recent global economic forecast downgrades many resource-rich African countries, their sectoral composition and sources of GDP are changing faster.[97] For example, the 2013 5.1 per cent growth rate experienced by Angola, Africa's second largest oil producer and second largest oil exporter to China, came mostly from construction and industry. In fact, other sectors are taking the slack, suggesting even greater potential for African economies to turn their resource advantage into competitive engine for driving industrialisation.

In looking at broader strokes, however, and as a consequence of these changing relationship patterns, several questions must be broached by African leaders and people. First, what does Africa hope to get out of a relationship with China? The answer depends on the country in question, and one's position and perspective. The African continent has, in the past, eagerly embraced Chinese capital, diplomatic entreaties, and cultural trappings at an unprecedented level, particularly by autocratic leadership and states in which elites have been enriched by Chinese investment.[98] In weak democracies, China has been seen as a strategic partner providing FDI without attached conditionality, particularly for rent-seeking elites who continue to pull from state resources.[99] This relationship, however, becomes more complicated in strengthened democracies, and within local populations themselves. With the former, popular governments do tend to have positive perceptions of Chinese FDI, but there is a recognition that these emerging enterprises may compete with local industry and business.[100]

Simply put, at the moment and depending on state context, it appears that China needs Africa as much as Africa needs China.[101] The relationship likely sits somewhere between a Faustian bargain, whereby Africa is jeopardising its long-term economic health for quick short-term fixes, and symbiosis.[102] Haroz notes that Africa, in its partnership with China, can help support at least six of its core interests: infrastructure development; FDI; achieving favourable loan terms; the reduction of debt; sustaining high growth rates and expanding its trade volume so as to accelerate its economic development; and sourcing new technology and professionalised training.[103] The author notes, however, that Africa has much to lose as well as to gain from this relationship, if it is not properly restructured to translate rhetoric into results, while placing in prominence long-term continental interests and sustainable growth. In an unbalanced relationship, Africa risks relinquishing its incredible natural resource wealth without having leveraged sufficient Chinese assets in return.[104] Thus, what Africa 'hopes to get' out of a relationship with China will depend considerably on the continent's ability to build for itself equitable arrangements with outside actors.

The second question to be answered is: What should an African strategy towards China look like? Outside of FOCAC, there is a considerable lack of unification in African voice, thereby weakening their potential bargaining position in relation to China.[105] Indeed, different African states will likely always have differential interests in and output requirements from a partnership with China. Haroz notes that while African states have greater leverage in dealings with China, thanks to their control over much-needed natural resources, this has not been converted into negotiating power. This weakness has been compounded by a general failure of the African Union to coordinate continental engagement with China.[106] It is paramount that Africa clearly defines its Africa–China policy so as to align with its primary political and economic interests, including the AU Vision 2063, desires for continental integration, and the AMV. When focus is placed on the role of industrial development as a means for attaining structural transformation, inclusive and sustainable development, and poverty reduction in African countries, changes must be defined in the way that mineral resources are used, compared with how they have been used in the past. For most, this realisation has been manifested as a swell of interest in adopting beneficiation policies, strengthened legislative and legal frameworks, and the development of mutually beneficial investment incentive programmes, particularly through regional integration strategies.

Tough questions should be broached by policymakers on the continent, including how engagement with China positively contributes to Africa's competitive advantage; whether alternative partners do exist and should be engaged with; if local development should be owned at a state or continental level; and if Africa's future prosperity should be wholly or partially driven by Chinese investments. What are the choices for Africa? It is time that African states, individually and as a collective, evaluate and assess the wide-ranging impact of China's investments in the natural resource sector, both positive and negative. Without this concerted effort, it is likely that increasingly adamant calls by African private-sector actors, public officials, civil society and populations themselves, for a relationship with China that provides equitable and sustainable, long-term growth, will fall on deaf ears.

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also expects a new 700-km rail line linking the capital of Addis Ababa to Djibouti to open in 2016, being built at a cost of US $4 billion by several Chinese corporations; CBTL, *CMA-CGM Group 14*, 21.
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