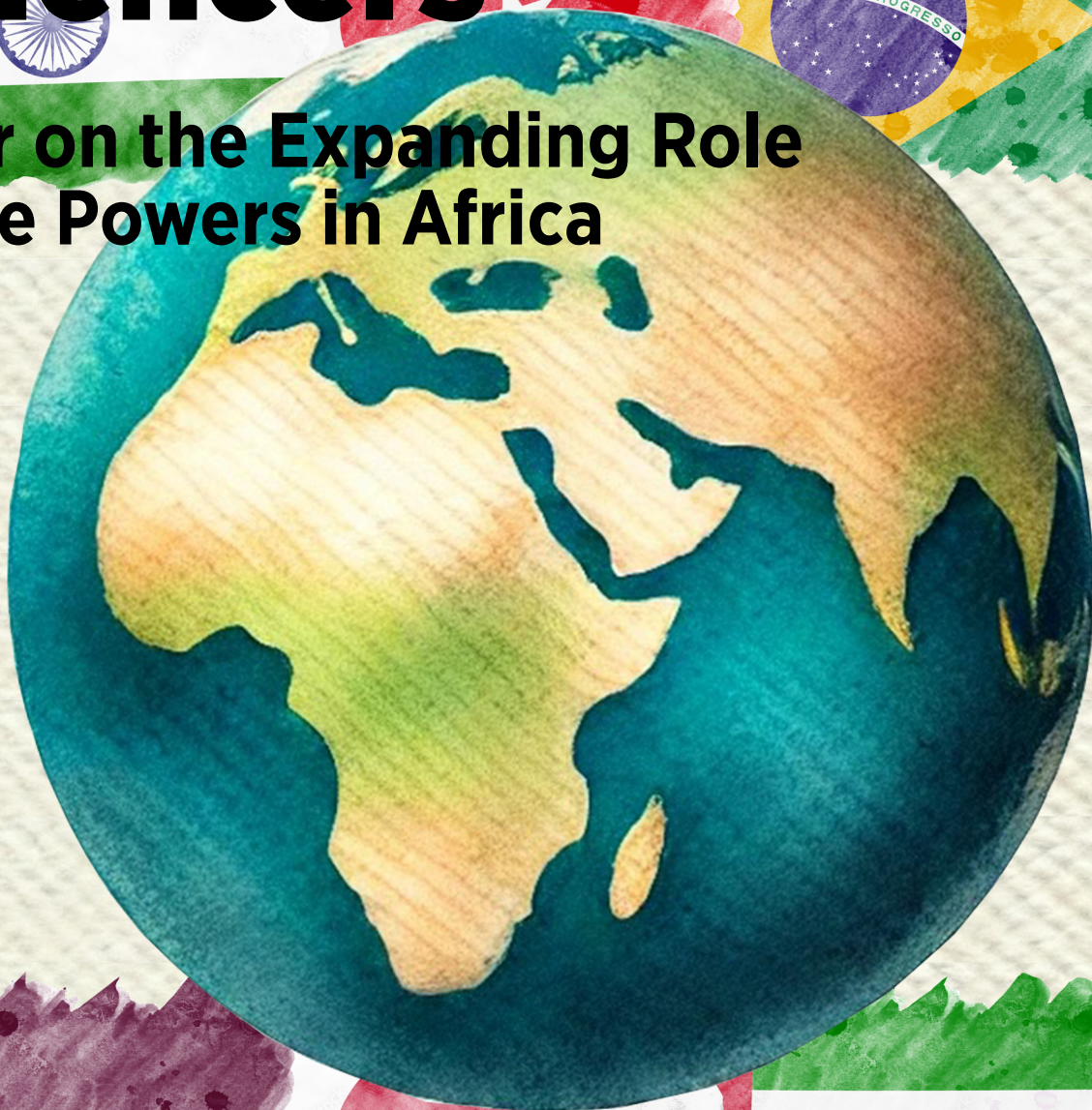


THE AFRICA FUTURES PROJECT

The New Influencers

A Primer on the Expanding Role of Middle Powers in Africa

Grace Jones
Nils Olsen



HARVARD Kennedy School
BELFER CENTER

50 YEARS
OF RESEARCH, POLICY,
AND LEADERSHIP

REPORT
AUGUST 2024



The Africa Futures Project

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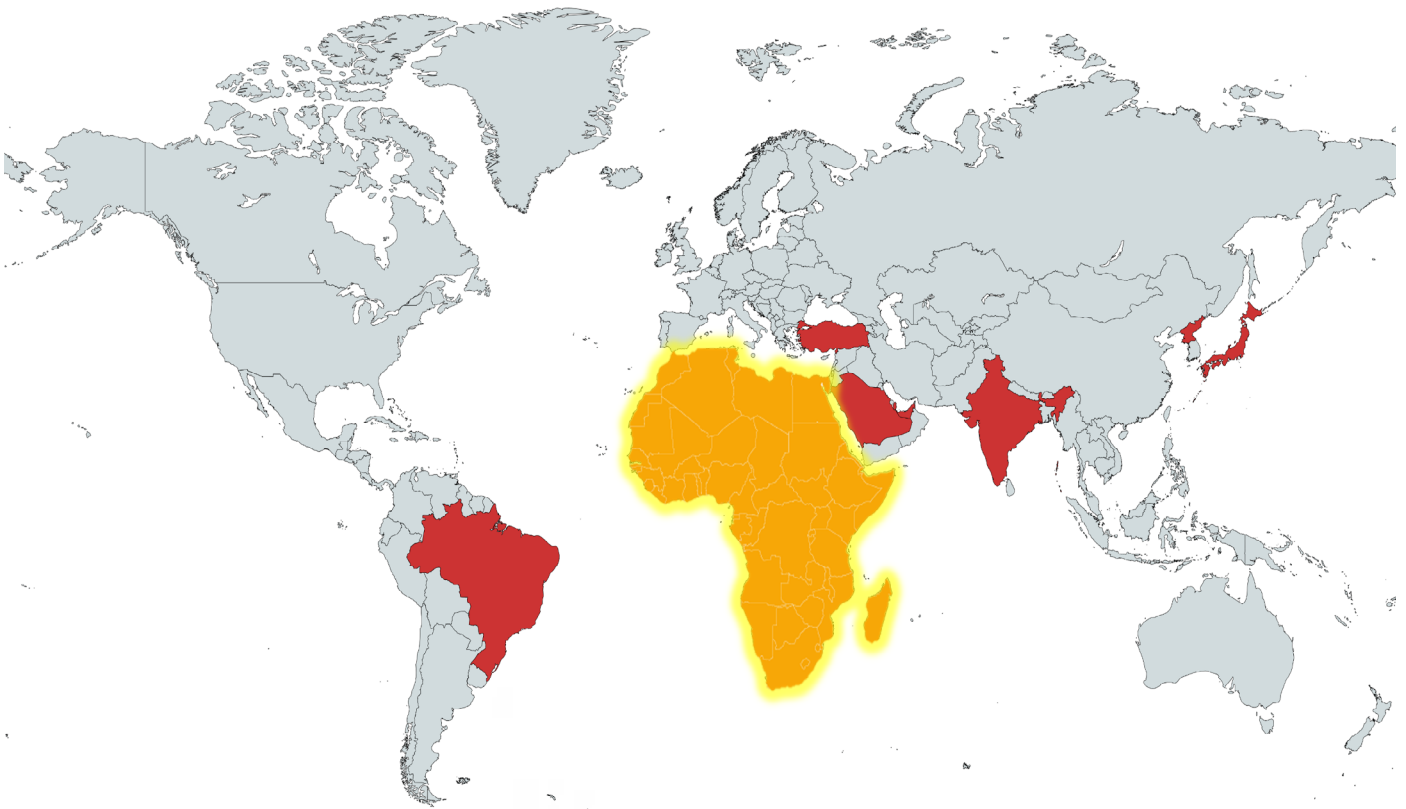
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India • Saudi Arabia • UAE

Qatar • Brazil

Japan • DPRK • Turkey

With Africa's share of the global population projected to reach 25% by 2050, middle powers recognize the continent's role in their own search for influence. Some observers presume middle powers need to choose between aligning with the U.S. or China; in Africa, however, these nations can diversify away from bipolarity while also projecting their own power.



By focusing only on Russia's and China's actions on the continent, policymakers are missing the reality of middle powers emerging as a counterweight.

The Africa Futures Project

The **Africa Futures Project** (AFP) drives debate and research on critical issues of African politics and governance; climate change and the global energy transition; conflict and security; and geopolitics as they shape our collective future. AFP is committed to engaging with stakeholders at all levels and centering the perspectives of African policymakers, scholars, and experts. It is Co-Chaired by **Natalie Colbert**, Belfer Center Executive Director, and **Dr. Zoe Marks**, Lecturer in Public Policy and Oppenheimer Faculty Director of the Center for African Studies.

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Grace Jones graduated with her Master in Public Policy from Harvard Kennedy School of Government (HKS) in May 2024. Before graduation, Grace was a Research Assistant for the Belfer Center, researching emerging technologies, specifically focused on their application in defense and security. Her research interests include emerging technologies in defense, the transatlantic partnership, the U.S. intelligence community, and security in Africa.

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Introduction

Scope

This original primer, conducted as research for **The Africa Futures Project**, is an initial exploration into the evolving roles and increasing influence of “middle powers” in Africa. It covers a diverse array of existing and aspiring middle powers, presenting key points for each nation under four distinct analytical lenses. The goal of this primer is to provide a foundational overview rather than an exhaustive analysis. Inspired by our preliminary findings, we hope that future research will deepen this analysis, including further studies on how middle powers’ policies in Africa influence the rivalry between the United States (U.S.) and China.

Defining a Middle Power

The term “middle power” is both useful and contested. There is no universally accepted set of middle powers; this largely subjective term generally refers to states that are not considered “great powers” but still exert significant international influence.

This primer examines eight nations that command analytical attention due to their political, economic, or geographic importance toward Africa: **Brazil, India, Japan, North Korea** (formally known as the **Democratic People’s Republic of Korea** or simply DPRK), **Saudi Arabia, Turkey, the United Arab Emirates (UAE), and Qatar.**

Although some of these eight nations would not be considered middle powers in a classical definition, as they wield their influence in Africa, they exhibit attributes of middle or regional powers.¹ They leverage their unique positions among great powers, sometimes below the radar, to amplify their influence with African countries and shape the continent’s future. We describe our chosen countries of analysis as “non-great power states with significant influence in Africa,” a description that, while accurate, is less succinct.¹

Finally, this primer focuses on the actions of selected middle power nations toward the continent, not the actions of African countries toward these selected middle powers. We also acknowledge that several African countries—such as Kenya, Nigeria, and South Africa—could be considered middle powers; however, this primer focuses on external middle powers and their engagement with the continent and African nations rather than intra-African affairs.

Why a Primer?

For a continent historically shaped by Western European colonizers, our analysis of middle powers extends beyond traditional research. There is an extensive analysis of Russia’s security interests and China’s economic investments in Africa, but there is a limited consolidated analysis of other strategically significant, non-Western actors on the continent. Furthermore, much of the narrative around middle powers focuses on their positioning between China and the U.S. In Africa, however, these nations are developing their own economic, military, and diplomatic relations, sometimes in partnership with the U.S. and China, sometimes in opposition, but often bilaterally. We hope our research sheds light on this less-examined dimension.

¹ For a traditional, 20th-century definition of “Middle Power,” see Cooper, Andrew F., Higgott, and Nossal. *In Between Countries: Australia, Canada, and the Search for Order in Agricultural Trade*. Montreal: McGill-Queen’s University Press, 1997.

Additionally, middle powers have often been characterized by three core characteristics: “international in focus, multilateral in method, and good citizens in conduct.” Quoted from Robertson J, Carr A. “Is anyone a middle power? The case for historicization.” *International Theory*. 2023; 15(3): 379-403.

Four Analytical Lenses

We analyze the roles of our selected middle powers in Africa through four lenses. These are not comprehensive but rather provide an overview of the nations' strategies toward the continent.

1. **Historical Context:** This analysis considers historical ties and significant trendlines in relationships. It focuses on the period after decolonization but also includes pre-colonial ties, if applicable.
2. **Diplomatic Efforts:** This area focuses on diplomatic relations, including the establishment of embassies, the frequency of bilateral visits, soft power projection, involvement in educational exchanges, and participation in regional and international organizations such as the African Union (AU), the Economic Community of West African States (ECOWAS), and BRICS.
3. **Security Engagement:** This encompasses military training and joint exercises, arms sales, specific interventions, and contributions to UN peacekeeping forces.
4. **Economic Ties:** This includes metrics on public and private foreign direct investment (FDI), loans, infrastructure projects, participation in economic summits, and overall trade and development initiatives.

Things You Might Not Know...

India: The Africa-India Field Training Exercise (AFINDEX) brings 25 African nations together to train alongside the Indian Army and hosts African partners at the Information Fusion Centre - Indian Ocean Region (IFC-IOR), a regional maritime integration center.

Saudi Arabia: Saudi private mining companies, supported by public financing, have entered into joint ventures with United States firms to extract critical minerals in Africa and export the ores to the U.S. to manufacture electric vehicle (EV) batteries and other green technologies.

Japan: Japan hosts one of the world's leading development conferences, the Tokyo International Conference on African Development (TICAD). At the 8th TICAD in 2022, Tokyo committed over \$30 billion in assistance to the continent. The 9th TICAD is slated for 2025 in Yokohama.

DPRK: North Korea's Mansudae Art Studio has constructed monumental statues across Africa, including a 160-foot, \$27 million African Renaissance Monument in Senegal. These statues promote DPRK ideology while providing much-needed revenue for the regime.

Turkey: Karpowership, a Turkish firm that operates natural gas-powered transformers installed on cargo ships, operates in eight African countries, supplying readily available, cheap power to governments unable to invest in expanding electrical grids or building new power plants.

Qatar: Seeking allies during the GCC rift, Qatar funded the 2017 presidential campaign of Mohammed Abdullahi Mohamed, aka Farmajo, in Somalia, ultimately leading to his victory at the polls.

UAE: Dubai Ports World (DP World) manages multiple ports, from the Red Sea to Tanzania, entrenching its position as a leading logistics interlocutor between Africa and Asia.

Brazil: The Brazilian Navy has been a critical leader of the Zone of Peace and Cooperation in the South Atlantic (ZOPACAS), a UN-backed initiative to support cooperation and collective peace between South American and African states.

Key Takeaways

A Needed Emphasis on Middle Powers

With Africa's share of the global population projected to reach 25% by 2050, many nations considered “middle powers” recognize the continent's growing role in their quest for increased geopolitical influence. This primer examines eight countries—**Brazil, India, Japan, North Korea** (formally known as the **Democratic People's Republic of Korea** or simply DPRK), **Saudi Arabia, Turkey**, the **United Arab Emirates** (UAE), and **Qatar**—that are significant due to their political, economic, or geographic importance to Africa, yet are often under-analyzed in discussions about external powers acting on the continent.

By predominantly focusing on Russian and Chinese actions on the continent, Western policymakers miss opportunities to view these middle powers as potential allies or counterweights. These states act independently of great powers' foreign policies, suggesting that long-standing partners of African nations—the U.S., China, and European states—should reevaluate Africa's dynamically evolving foreign political environment.

An Alternative to Great Powers

With Chinese loans to Africa declining and Western aid becoming sparser, middle powers are beginning to fill such vacuums, offering a “third option,” distinct from alliances with superpowers. These nations have the potential to profoundly reshape the continent, driven by national interests that align with those of many African countries.² For one, many middle powers and African states share a mutual geopolitical interest in reshaping the global order and international institutions to better represent voices from the Global South. As middle powers pursue diverse agendas, these partnerships are poised to fuel further shifting geopolitical realities.

Some observers assume that middle powers must choose between alignment with the U.S. or China. In Africa, some actions by middle power states are driven by their relationship with great powers; for example, Japan's naval participation in U.S.-led counterpiracy efforts off the Horn of Africa augments the U.S.-Japan security relationship in the Pacific. However, most actions by middle power states in Africa serve defined national interests and are agnostic to great power actions. Additionally, there are spaces in Africa where middle power states hold the upper hand, compete directly with larger states, or are the intermediaries that bring great powers like the U.S. or China to the table.

Geography Supports Geopolitical Freedom

While the U.S., Russia, and China maintain regional spheres of influence, Africa lies further afield and lacks a regional hegemon. Therefore, it is somewhere a non-African nation can grow its influence without directly antagonizing a great power. Moreover, as superpowers remain preoccupied with competing priorities—including wars in Ukraine and Gaza, domestic political turmoil, or economic slowdowns—middle powers have a growing window of opportunity to exert influence in Africa without provoking conflict with a great power.

No Middle Powers Consensus

The eight nations examined in this report do not form a unified bloc; instead, they often compete directly against one another and other countries. In the security domain, Gulf states and Turkey back opposing factions in conflicts in Libya, Sudan, and Somalia. Economically, our eight nations compete for African commodities, while airlines such as Emirates, Qatar Airways, and Turkish Airlines vie to be the air carriers of choice, linking the continent to Asia and beyond. While India and Brazil favor deeper diplomatic ties through established international institutions, like the UN or AU, others prefer bilateral agreements with specific African partners.

Core Findings Across Four Analytical Lenses

Historical Ties Shape Present Policies

Three distinct types of historical legacies define the contemporary relationships these middle powers maintain with African states:

- Acting as an alternative or counterweight to colonial powers (Turkey, DPRK, Japan).
- Cultivating “South-South” ties, built on a shared anti-colonial legacy or Cold War-era non-aligned movement (India and Brazil).
- Sustaining a legacy of ancient trade networks (Saudi Arabia, Qatar, UAE).

Diverse Diplomatic Engagement Strategies

Middle powers are deepening diplomatic ties with Africa through three general approaches:

- **Multilateralism:** India and Brazil are pushing for international institutional reform to expand their influence across the Global South. To do so, they are elevating African voices and multilateralism in forums such as the Global 20 (G20), UN Security Council (UNSC), and BRICS. As African populations and markets grow over the coming decades, they hope this ever-increasing geopolitical weight can advance their broader foreign policy aims.
- **Bilateralism:** The Gulf Countries and Turkey are expanding bilateral ties with governments across the continent by increasing their diplomatic presence and foreign offices of development agencies or backing security forces. As countries historically excluded from international institutions, bilateral ties are a continuation of past policy. For middle powers and African states that balance relationships with competing Great Powers, bilateralism offers flexibility and a degree of ambiguity, helping to avoid antagonizing the U.S., China, or Russia.
- **Targeted Engagement:** Japan and DPRK pursue narrow, often project-based strategies rather than broad regional diplomatic agreements. Further afield from the continent, their primary security concerns in Asia dictate their limited engagement with African states. Tokyo and Pyongyang can leverage American or Chinese relationships, respectively, with African partners if desired, avoiding the need to develop their own distinct ties.

Security Exporters

Middle powers are increasing their military ties with African countries, although they continue to lag significantly behind former colonial and other established powers.

- Some middle powers are willing to pursue direct involvement in African conflicts, such as in Sudan, Libya, and Somalia, where they compete for regional influence by arming warring factions. They are on opposing sides in some places; in others, they find common ground and even broker peace.
- Other states—including the UAE and Qatar—who are involved in African conflicts, do not act with the same interventionism in their own backyard. These nations view Africa as their near abroad, where they can jockey for influence precisely because the U.S. and China do not prioritize this part of the world.

- Middle powers geographically further from the continent, such as India, Brazil, and Japan, favor maritime involvement, while the Gulf States and Turkey are involved in land-based conflict.
- Turkey provides an alternative to the U.S., France, and Russia for arms sales, offering weapons without diplomatic or political strings attached.
- Many middle powers have been actively involved in UN peacekeeping missions in Africa, either to increase their global influence, boost their clout within the organization, or maintain security in their near abroad.

Varied Economic Portfolio

Middle powers' investments are often diversified across the continent and across industries, not just in large economies like South Africa or Nigeria.

- Middle powers have joined Western countries and China in offering development financing, hosting high-level summits, boosting trade, and providing loans to African governments. Private firms and non-profits have followed, launching joint ventures to build infrastructure, expand energy networks, and erect schools and mosques.
- Commodity and food imports from Africa remain high, especially for Gulf nations.
- Africa's energy sector draws engagement from middle powers as a source of critical minerals needed to power the green transition and as an export market for oil-rich states.
- Sports and tourism revenues have increased rapidly as regional entertainment conglomerates expand beyond the Gulf. At the same time, state-backed airlines such as Emirates, Qatar, and Turkish Airlines link the continent to Europe, Asia, and beyond.

A Map of Africa



* "Map of Africa - the African Countries," Nations Online Project. https://www.nationsonline.org/oneworld/africa_map.htm (accessed 24 July 2024).

India

India is expanding its role in Africa as an alternative to the U.S. and China. It seeks to increase its foreign clout through cooperation in the economic, development, health, defense, and technology sectors. India's relationship with Africa is characterized by diaspora ties and its view that it is a leader of the Global South.

Historical Context

- **Indian Diaspora:** The Indian diaspora in Africa is estimated at 3 million people,³ rooted in the migration of Indian laborers and traders to Africa during the British colonial era. In a project that exemplifies the magnitude of Indian labor, in the late 1800s, the British Empire brought 30,000 Indian indentured laborers to Africa to construct the Kenya-Uganda railway.⁴ Throughout the 20th century, Indians in Africa faced difficulties, including persecution and the seizure of their properties, with the most notable instance being their forced expulsion from Uganda in 1972.⁵ Despite a robust blend of Indo-African enterprises and cultural exchanges throughout the continent, there remain post-colonial political tensions in some places and low social and economic integration between Indian descendants and black Africans.⁶
- **Political Narratives:** India and the African continent share a common thread in their histories of colonization, fostering a shared anti-colonial and resistance rhetoric that binds their historical experiences. This is especially true between South Africa and India, both colonized by the British Empire. Mahatma Gandhi spent 21 years in South Africa, where he developed his philosophy of nonviolent resistance. Gandhi's civil disobedience philosophy subsequently profoundly influenced Nelson Mandela's approach to ending apartheid in South Africa. As of 2015, South Africa was home to the largest population of people of Indian descent in Africa, at 1.3 million, mainly in the city of Durban.⁷
- **Voice of the Global South:** India views itself as a primary voice for developing countries, including many African nations. India's efforts to lead dissent and critique against the structure of multilateral forums that are not representative of the developing world include championing African participation; most recently, this manifested in advocating for AU membership in the G20.

Diplomatic Efforts

- **New Africa Policy:** Prime Minister Narendra Modi unveiled a new Africa policy when he addressed the Ugandan Parliament in July 2018. This includes Africa “[as] a top priority” and a partnership encompassing trade, boosting agricultural productivity, addressing climate change, combating terrorism, promoting maritime cooperation, and preventing geopolitical rivalries in Africa.⁸
- **High-Level Diplomacy:** Since the 1960s, India's prime ministers have visited Africa 76 times, predominantly visiting Egypt, South Africa, and nations along the Indian Ocean.⁹ From 2015 to 2022, New Delhi received over 100 African leaders, and each African country received an Indian cabinet minister.¹⁰ The India-Africa Forum Summits in 2008, 2011, and 2015 brought together heads of state from India and 15 African nations. These large bilateral summits focused on India's push for UN reforms, discussions on climate change, and solidifying development initiatives.¹¹

- **Democracy Promotion:** India has promoted democracy in Africa for decades, although democracy promotion is a mechanism for achieving its own national interests rather than a desired policy endstate.¹² Democracy support to Nigeria and Namibia, for example, has included sharing knowledge and experience in the organizational and technical development of the electoral process by the Election Commission of India (ECI), as well as technical support training officials on electoral and parliamentary systems.^{13,14,15}
- **Education:** The first international campus of the Indian Institute of Technology (IIT) was established in Tanzania in 2023. IIT-Madras opened the first international campus in Zanzibar “as part of the Government of India’s endeavor to take the top-quality education system of India to international arenas.”¹⁶

Security Engagement






- **Defense Agreements and Arms Sales:** India has substantial defense engagement with the continent but primarily focuses on nations bordering the Indian Ocean. India has memorandums of understanding (MOUs) with Tanzania and Kenya on shipbuilding and port development;¹⁷ MOUs with Mauritius, Seychelles, and Mozambique cover defense equipment sales.¹⁸ India’s defense agreements enhance regional maritime security and assert India’s strategic presence as a counterbalance to increasing Chinese influence in the region.
- **Basing:** India’s efforts in these areas reflect its strategic aim to enhance its influence and monitor critical maritime routes in the Indian Ocean. To counterbalance China’s growing presence in the region, India has three key sites in Africa to project naval power and monitor maritime routes. In Mauritius, India is developing a significant military base on the Agaléga Islands.¹⁹ In the Seychelles, India signed a revised agreement to develop military infrastructure on Assumption Island, which India could use for port calls and supplies.²⁰ In Madagascar, India established a radar facility, although it is not a formal military installation.²¹
- **Multilateral Engagement:** India is working to institutionalize defense cooperation through officer exchanges and training African officers at Indian academies through the India–Africa Security Fellowship Program.²² Additionally, African nations participate in the Information Fusion Centre – Indian Ocean Region (IFC-IOR), India’s regional maritime integration center.²³ India also participates in a regional maritime operations center on the continent in the Seychelles: the Regional Coordination Operations Center (RCOC).²⁴ To date, there have been two India-Africa Defense Dialogues (IADD) to further Indian-African defense partnerships, with the most recent IADD held in 2022.²⁵
- **Exercises:** The Africa-India Field Training Exercise (AFINDEX) has run twice, in 2019 and 2023, where the 2023 iteration saw troops from 25 African nations train alongside the Indian Army.²⁶ India established trilateral maritime exercises with Tanzania and Mozambique (IMT-TRILAT) in 2022, and the second iteration concluded in March 2024.²⁷ Bilaterally, the Indian Navy conducts Maritime Partnership Exercises (MPX) with African countries; as of 2022, Kenya, Nigeria, Egypt, Madagascar, Morocco, South Africa, Sudan, Tanzania, and Togo had participated.²⁸
- **UN Peacekeeping:** India has participated in UN peacekeeping missions in Congo, Angola, Mozambique, Somalia, Sierra Leone, Democratic Republic of Congo (DRC), Ethiopia- Eritrea, Liberia, Sudan and South Sudan.²⁹

Economic Ties

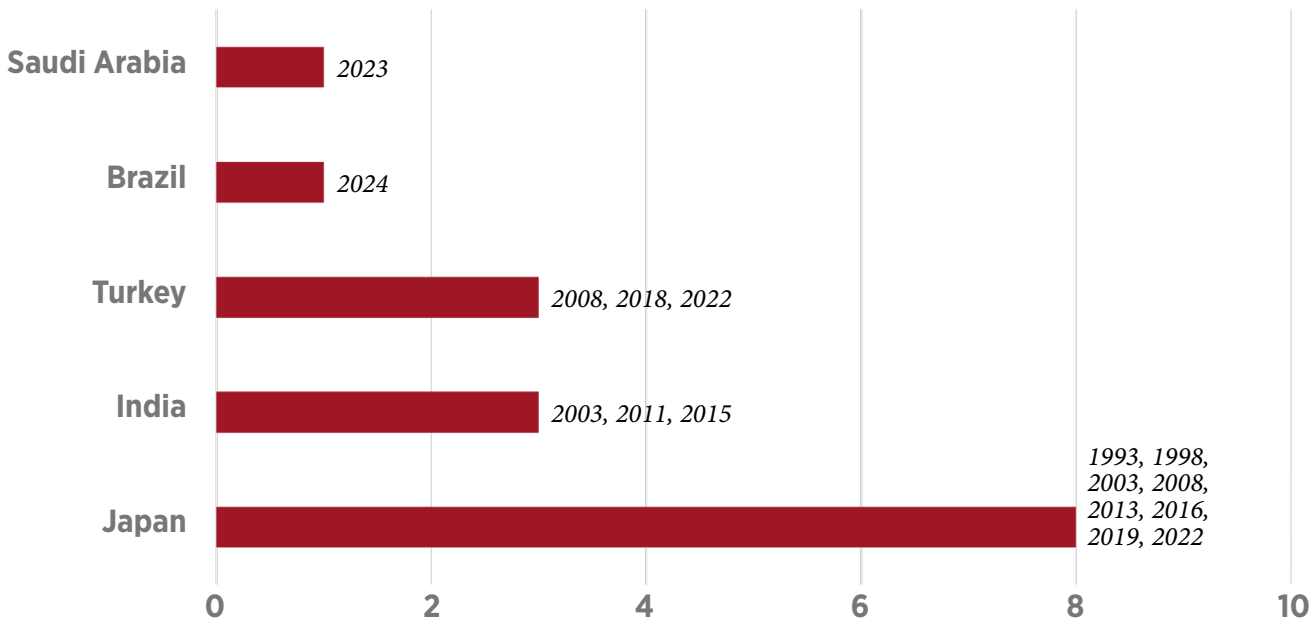
- **Information and Communications Technology (ICT) Project:** A partnership between the Government of India and the AU, the Pan African e-Network Project and its successors, e-VidyaBharti and e-ArogyaBharti (e-VBAB), offer satellite connectivity, tele-medicine, tele-education, and continued medical education to African countries.
- **Capacity Building:** The Indian Technical and Economic Cooperation (ITEC) program is crucial in fostering international development and diplomacy by offering training and capacity-building programs to African professionals. Since 1964, ITEC has partnered with 44 African countries, and Africa encompasses a third of ITEC's funding.³⁰ Additionally, Indian social enterprises and NGOs are exporting low-cost, scalable solutions to the continent, including eco-friendly houses and Barefoot College, which trains rural women in solar engineering.^{31,32}
- **Trade:** India-Africa trade has grown 18 percent annually since 2003, reaching \$103 billion in 2023.³³ India is Africa's third largest trading partner after the European Union (EU) and China, with trade across various sectors like textiles, pharmaceuticals, automobiles, and light machinery.³⁴
- **Lending:** Over the last decade, India has provided \$32 billion in credit to 42 African countries.³⁵ India has extended lines of credit and grants for infrastructure, agricultural development, and capacity building. India and the African Development Bank (AfDB) signed an agreement in 2015 for the India-Africa Economic Cooperation Fund for \$9.5 million.

Africa-Middle Power Summits

Middle powers use economic summits with African countries to strengthen trade ties, secure resource access, and promote investment opportunities. These summits also serve as platforms for diplomatic engagement, enhancing their influence and partnerships across the continent.

				
Brazil-Africa Forum	Turkey – Africa Cooperation Summit	Saudi Arabia – African Summit	India-Africa Forum	Tokyo Intl. Conf. on African Dev. (TICAD)
Participants: Brazilian & African business leaders, investors, political leaders.	Participants: Turkish government officials, and representatives from 30+ African countries.	Participants: Leaders and senior government officials from Saudi Arabia and 50 African countries; representatives from the Saudi Development Fund & private firms.	Participants: Heads of state from India and selected African countries, as well as finance and trade ministers.	Participants: 50+ African and Asian Heads of State, 300+ Business Leaders, international & regional organizations.
Purpose: Spur sustainable development in Brazil and Africa via infrastructure investment.	Purpose: Deepen economic cooperation and trade, including foreign investment, to enhance relations and promote “common development and prosperity.”	Purpose: Further develop cooperation between Saudi Arabia and Africa, including promoting strategic partnerships, trade, and foreign investment.	Purpose: Facilitate trade between India and African nations.	Purpose: “To promote and sustain international support for Africa’s development, while also promoting African ‘ownership’ and international ‘partnership’”

Total Summits, 1990 - 2024



Saudi Arabia

Under Crown Prince Mohammad Bin Salman (MBS), Saudi Arabia has intervened in North and East African conflicts to support regimes it favors. This is part of broader foreign policy efforts to expand its influence beyond the Middle East and deepen economic ties with its near abroad as it diversifies its economy beyond oil.

Historical Context

- **Islam's Influence:** The connection between Saudi Arabia and Africa is deeply rooted in the influence of West African Muslim empires like Mali and Songhay, which looked to Saudi Arabia as the birthplace of Islam. These empires established Islamic institutions, blending local practices with Islamic teachings.³⁶ The Hajj pilgrimage further strengthened these ties, as rulers like Mansa Musa showcased their wealth and prestige, fostering cultural and religious links.³⁷ Trade, intermarriage, and Islamic schools also promoted Arabic scholarship and diplomatic relations with the Arab world.³⁸ While Sufi practices were long prominent among African Muslims, Riyadh has been pivotal in spreading the strict Salafi strain of Islam.³⁹ Furthermore, Saudi Arabian-backed non-government organizations (NGOs), like the World Muslim League, have spent over \$100 billion promoting the ultra-conservative Wahhabi strain of Islam across the continent.^{40,41}
- **Arab-Africa Trade:** Arab-African connections stretch back centuries to when early Muslim merchants expanded their trade routes west and south beyond the Arabian Peninsula, spreading their faith with them. For over 1,300 years, Africans were enslaved by Arabs and traded across the Arab Gulf and into the Levant.⁴² Key trading centers, such as Zanzibar, facilitated the transport of enslaved people and commodities like ivory and cloves from Africa to Arabia.⁴³

Diplomatic Efforts

- **Saudi Arabia-Africa Summit:** In November 2023, the first Saudi Arabia-Africa summit in Riyadh highlighted Saudi Arabia's ambition to incorporate Africa into its new diplomatic and economic policies.⁴⁴ In front of over 50 African leaders and the AU chair, MBS announced plans to open 13 new embassies by 2030, bringing Saudi Arabia's total on the continent to 40.⁴⁵
- **Vision 2030 and Africa:** Saudi Arabia's Vision 2030, a strategic geoeconomic plan to diversify its economy away from oil, has underscored the importance of Africa. Riyadh seeks to foster greater ties in non-petroleum industries with the Global South, overlapping with many key goals of the AU's own Agenda 2063, including increasing economic diversification, championing sustainable development, building infrastructure, and enhancing regional cooperation.⁴⁶
- **Regional Influence & Peacemaking:** Saudi Arabia seeks to increase its regional influence, especially in the Horn of Africa and the Red Sea. In 2018, it successfully brokered peace between Ethiopia and Eritrea to end a decade of war and has attempted to do the same in Sudan.^{47,48} These efforts stem from a desire to ensure regimes that support deeper African-Arab ties stay in power and adhere to similar strains of Islam rather than from a quest to end conflict.

Security Engagement

- **Sudanese Civil War:** Saudi Arabia and Egypt back the Sudanese Armed Forces (SAF) state military in its fight against the Emirati-backed Rapid Support Forces (RSF) paramilitary. Saudi Arabia hopes that a SAF victory will support long-term stability and secure further economic integration between Sudan and Saudi Arabia (Riyadh has already pledged up to \$24 billion for infrastructure, mining, and agriculture projects in Sudan).⁴⁹ Yet beyond safeguarding its own interests, Saudi Arabia prefers to cast itself as a neutral and potential peacemaker.⁵⁰ Despite attempts to broker peace in late 2023, Saudi Arabia appears willing to continue arming the conflict to ensure a SAF victory, maintain the rule of General Abdel Fattah al-Burhan, and deny the UAE increased influence in the country.
- **Libyan Civil War:** Saudi Arabia and the UAE are providing logistic and financial support to the Libyan National Army (LNA) in its fight against the UN-backed Government of National Accord (GNA).⁵¹ The two Gulf Countries are opposed to a GNA government forming in Libya because of its close ties with the Muslim Brotherhood and opposition to the Madhkali and Wahhabi strains of Islam, native to the UAE and Saudi Arabia, respectively.⁵² Additionally, Gulf oil companies seek to capitalize on the post-war reconstruction of the neglected Libyan crude oil industry, especially as Vision 2030's economic diversification threatens their balance sheets.

Economic Ties

- **Food Imports:** With little domestic food production, Saudi Arabia imports nearly all of its food, including over \$800 million from Egypt and another \$825 million from Sudan, Ethiopia, Kenya, and South Africa combined, according to analysis by Trading Economics and data from the World Bank.⁵³ The volume of trade with South Africa is set to increase now that Riyadh's 20-year ban on beef and lamb imports has been lifted.⁵⁴
- **Oil:** Saudi Arabia has tried to boost both oil supply from and demand in Africa. In a deal with newly-elected Nigerian President Bola Tinubu, the Saudis have invested in a series of Nigerian oil refineries.⁵⁵ Simultaneously, through the oil demand sustainability program (ODSP), Riyadh is investing to drive up the use of fossil fuel-powered automobiles, buses, and airplanes in Africa and other developing countries to offset the decrease in demand from the switch to clean energy in rich countries.⁵⁶
- **Trade & Foreign Direct Investment (FDI):** Saudi Arabian and sub-Saharan African trade has increased twelve-fold in the last decade.⁵⁷ During its presidency of the G20 in 2020, Saudi Arabia was influential in extending the Debt Service Suspension Initiative (DSSI), providing debt payment relief for 73 low-income countries struggling amid COVID lockdowns and supply chain backlogs, many of which are in Africa.⁵⁸ At the first Saudi Arabian-African summit in late 2023, MBS pledged \$25 billion of investment by 2030, including \$10 billion as insurance for Saudi Arabian exports and \$5 billion in development financing.⁵⁹ This is on top of over \$45 billion already deployed in support of humanitarian projects in 54 African nations, financed by the Saudi Arabian Development Fund, including a \$158 million construction project to build hospitals and dams in Mozambique.⁶⁰
- **BRICS:** Saudi Arabia was offered membership into BRICS in late 2023, but has yet to officially accept it as of June 2024 as it weighs the geopolitical implications of such a move. While accession would deepen ties to Africa, especially with new members Ethiopia and Egypt, membership risks alienation from other trading partners, namely the U.S. and EU.⁶¹ A comprehensive analysis of the BRICS and Africa can be found on page 37.

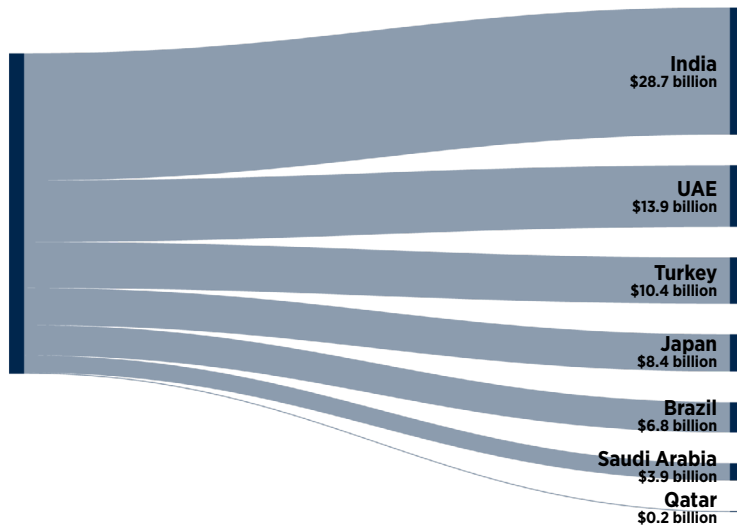
- **Sports Investment:** As a key component of diversification away from oil, Saudi Arabia is expanding into the world of sports. It has invested over \$200 million to sponsor the new African Super League,⁶² is behind an expansion of the Professional Fighters League (PFL) into North Africa,⁶³ and approached the South African Springboks national rugby union team about investment.⁶⁴
- **Critical Mineral Resources:** In the fall of 2023, Saudi Arabia began talks with the U.S. about partnering to boost critical mineral mining in Africa. Such ventures would feature state-backed Saudi investment in mining assets, with U.S. companies offered priority access to the ore. This structure can help fuel American domestic manufacturing of lithium-ion batteries while side-stepping American environmental, social, and government (ESG) concerns and mitigating some of the perceived risks of projects in frontier markets.⁶⁵ Leading this effort is Manara Minerals, a joint venture between the \$700 billion Saudi Arabian Public Investment Fund (PIF) and Ma'aden, the state-owned mining company that has already begun a project in the Democratic Republic of Congo. For African countries, partnering with Riyadh offers two advantages: to learn from Saudi experience leveraging natural resources to drive economic development, which many African countries are keen to do, and because the PIF, in contrast to other capital suppliers, is far less sensitive to short-term price signals.⁶⁶

An Emphasis on Basic Commodity Trade: Middle Powers' Trade with Africa

Middle powers contribute to 18% of Africa's imports and receive 12% of the continent's exports.* India dominates in trade volume, while the UAE, Saudi Arabia, and Turkey utilize their geographical proximity for exporting to Africa. Japan and Brazil maintain balanced trade relationships with the continent.

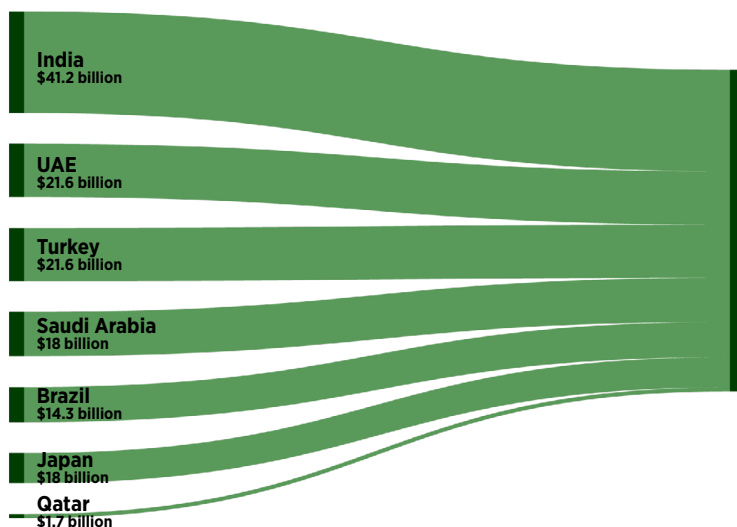
African Exports

In 2023, 12% of Africa's exports, equal to roughly \$72.4 billion, were destined for middle power states.



African Imports

In 2023, 18% of Africa's imports, equal to roughly \$130.5 billion, came from middle power states.



Oil and Gas

Gulf countries have sought to increase oil demand in Africa, offsetting lower consumption in Western countries switching to renewable fuels.



Minerals and Metals

The UAE and Saudi Arabia are involved in mining projects on the continent, while Indian and Japanese industrial and technology companies rely on African ore for their manufacturing.



Agricultural Products

Gulf countries produce little domestic food and import nearly all of it, including grains, livestock, and produce. Egypt, Sudan, Ethiopia, Kenya, and South Africa are primary exporters.



Weapons

Turkey has established itself as a crucial arms exporter to African militaries, including selling drones and vehicles. India also sells defense equipment to Mauritius, Seychelles, and Mozambique. North Korean arms sales provide a low-cost, no-strings-attached option for some African militaries.



Narcotics

Brazilian gangs export cocaine and other narcotics to Africa and often onwards to Europe, India, or Asia. Moroccan cannabis heads for South America via a reverse trade route.

* Calculations based on UN and World Bank trade data (both imports and exports), compiled by the International Trade Centre. Due to unreliable data and low trade figures, the DPRK was excluded from this graphical analysis.

United Arab Emirates

The United Arab Emirates (UAE) is eager to expand its relations with Africa beyond its role as an oil exporter and financial hub. Its involvement in conflicts in Libya, Sudan, and Somalia is part of a larger competition with Saudi Arabia, as both vie for greater global influence. Emirati state-backed firms have invested heavily in ports and other infrastructure projects, competing directly with Chinese firms.

Historical Context

- **Maritime Trade:** Trade from the Persian Gulf down the East African coast and up the Red Sea has persisted for centuries as Arab merchants exchanged goods with their East African counterparts. This history influences economic and diplomatic aspirations today, as the Emirati cities of Dubai and Abu Dhabi seek to solidify their roles as regional trade, finance, and cultural centers.
- **African Diasporas:** With a small Emirati population, the UAE has long attracted migrant workers and immigrants. Arabic-speaking Sudanese, Eritreans, Somalis, and other East Africans have migrant laborer diaspora communities in the UAE that are supported by and send remittances back to their home countries.⁶⁷

Diplomatic Efforts

- **Red Sea Relations:** The UAE has furthered diplomatic ties with many partners in the Horn of Africa to help ensure regional security and increase trade. For example, the UAE and Saudi Arabia were pivotal in the 2018 peace deal between Ethiopia and Eritrea. Concerned about relations between Mogadishu and the UAE's rival Qatar, the UAE has deepened ties with Somalia's federal states and the semi-autonomous Somaliland.
- **Local African Displacement:** The Emirati royal family has been linked with the forced displacement of indigenous African communities. In 2022, 580 square miles of the Ngorongoro Conservation Area, a UN Educational, Scientific and Cultural Organization (UNESCO) World Heritage site in Tanzania, were designated as a luxury game reserve site for the Emirati royal family.^{68,69} This is part of broader "conservation colonialism"⁷⁰ in East Africa, driving displacement for as many as 150,000 Maasai, according to a report from the UN.⁷¹

Security Engagement

- **Sudanese Civil War:** The UAE has backed the Rapid Support Forces (RSF), the paramilitary force that evolved from the Janjaweed militia, in its efforts to overthrow the Saudi-backed Sudanese Armed Forces (SAF). This aligns the UAE with the Russian paramilitary Wagner Group, and this partnership facilitates a lucrative international gold trade: the RSF guards many of Wagner's mines in southwest Sudan, the gold from which is flown to Abu Dhabi before heading to Russia. The profits from gold sales help supply RSF, Emirati, and Russian arsenals. Beyond military assistance, the UAE has also invested over \$6 billion to support agricultural and infrastructure projects in Sudan.⁷² This includes a new military base established by the Emiratis near the Eritrean port of Assab.⁷³

- **Libyan Civil War:** The UAE, along with Saudi Arabia, is supporting the Libyan National Army (LNA) by providing supplies, materiel, and financial backing.⁷⁴ The Emiratis share Saudi concerns about a Muslim Brotherhood government forming should the Government of National Accord (GNA) seize control of the country. The fear of such a regime unites the two semi-rivals, proving a more substantial threat than marginal gains made in proxy conflicts elsewhere.
- **Somalia, Puntland & Somaliland:** Over the past decade, the UAE has increased military cooperation, diplomacy, and economic ties with Puntland and Somaliland - both semi-autonomous regions within Somalia. These efforts are aimed at combating Indian Ocean piracy, curtailing regional insurgencies, and creating a counterbalance against their Qatari rivals and Turkey, who both have strong ties to the government in Mogadishu.⁷⁵ In the Somaliland port city of Berbera, roughly 500km from Djibouti on the Red Sea, the Emirati military has integrated a military base into the Dubai Ports World-operated port. The UAE has also established a base in Bosaso, a city in the Somali region of Puntland, operated by roughly 200 troops.⁷⁶ Leveraging strong ties with Hassan Sheikh Mohamud, who regained control of the Somali federal forces after winning the Presidential election in 2022, the UAE funds counterterrorism operations conducted by the Somali Danab Brigade against al-Shabaab.⁷⁷

Economic Ties

- **Food Imports:** Similar to their Saudi neighbors, the Emiratis also import over \$1.25 billion worth of food annually from Africa, although in comparatively smaller quantities that constitute less of their overall import volume. Nevertheless, this amounted to roughly \$800 million in 2023 from Egypt, Ethiopia, Kenya, Sudan, Morocco, and Tanzania, and nearly \$450 million from South Africa alone.⁷⁸
- **Foreign Direct Investment:** According to the American firm White & Case, the UAE is Africa's fourth largest economic partner, particularly in infrastructure, agriculture, telecoms, and finance.⁷⁹ These figures will likely increase as regional trade ties grow and the UAE continues economic diversification.
- **Carbon Sink Projects:** Capitalizing on the rapidly growing global carbon credits market, the UAE has invested in African forests and other "carbon sinks," allowing domestic companies to emit higher volumes of carbon elsewhere. Blue Carbon, chaired by an Emirati royal and based in Dubai, has secured forested lands nearly the size of the United Kingdom across multiple African countries.⁸⁰ It then sells carbon credits to firms and governments meant to "offset" pollution creation. The young company has quickly established itself as an industry leader in the nascent carbon trading industry and is looking to expand its projects across sub-Saharan Africa.⁸¹
- **Financial & Flight Hub:** Dubai has established itself as a banking center, hosting many African business accounts and serving as a regional investment hub.⁸² Emirati banks have also provided debt financing and bailouts to regional governments, such as Ethiopia in 2018 and Sudan in 2019, and pledged \$35 billion in investment to Egypt in early 2024.⁸³ With frequent flights from 19 countries, the Emirates Air routes facilitate business engagement by connecting the two regions.⁸⁴
- **BRICS:** The UAE officially joined the bloc in January 2024 as part of larger BRICS expansion efforts. Its accession will facilitate deeper economic ties with fellow members South Africa, Egypt, and Ethiopia, especially as part of larger plans to drive infrastructure and energy projects within the Red Sea and Horn of Africa nations.⁸⁵ A comprehensive analysis of the BRICS and Africa can be found on page 37.

- **Port Development & Management:** Emirati logistics giant Dubai Ports World manages multiple ports across the continent. These projects have bolstered its position as a critical interlocutor between Africa and Asia.

- ▷ **Red Sea:** Since 2018, DP World has invested in developing the Eritrean port of Assab, providing an alternative link to Addis Ababa and the large, land-locked Ethiopian market.⁸⁶ This came in response to the Djiboutian government's unilateral termination of DP World's control of its Doraleh Container Terminal, the region's primary import/export center, in favor of Chinese control (China Merchants Port Holdings immediately agreed and expanded the port to include multi-use and dry bulk terminals).⁸⁷ In late 2022, DP World also announced a \$6 billion deal to build another Red Sea port, this one north of Port Sudan, which would also include an economic zone and airport.⁸⁸ However, this new venture comes with risk: Port Sudan has remained a SAF stronghold, which may target the DP World port to deny its ability to resupply the Emirati-backed RSF.
- ▷ **Somalia:** DP World operates across nearly every region of Somalia. In Puntland, it won a 30-year contract to manage the port of Bosaso in 2017. When the Emirati military established its base in Berbera in 2016, DP World established an adjacent container port. Its eyes are now fixed on the southern semi-autonomous Jubaland region, with a tentative venture planned for the city of Kismaayo.⁸⁹
- ▷ **Indian Ocean:** Extending its influence beyond its near-abroad, in late 2023, DP World announced a \$250 million investment to upgrade and operate most of the port in Dar es Salaam, Tanzania's capital.⁹⁰ Over the 30-year contractual period, investment may rise to \$1 billion.⁹¹

From Security to Energy: Middle Powers Maritime Initiatives

Middle powers are investing in African ports and energy projects to enhance economic ties while also strengthening their maritime presence through military bases and naval collaborations.



BRAZIL

The Brazilian Marine Corps established advisory groups in Namibia and São Tomé and Príncipe to boost the capacity of their amphibious forces. Brazil is a critical leader of the Zone of Peace and Cooperation in the South Atlantic (ZOPACAS), a UN-backed initiative to support cooperation and collective peace in the region.

INDIA

Maritime security cooperation fuels Indian regional bilateral ties, with three facilities on the Indian Ocean. The Indian Navy operates both multilateral and bilateral exercises with African counterparts.

JAPAN

Japan Self-Defense Force Base Djibouti was established in 2011—the first post-war overseas military base for Japan. In 2009, the Japanese Navy deployed destroyers for counterpiracy operations, and has participated in the international Combined Task Force 151 (CTF-151) since 2013.

TURKEY

Ankara operates its largest overseas military facility at the TURKSOM base in Mogadishu. Turkish company Karpowership provides electricity directly from its floating natural gas-powered generators.

UAE

Emirati logistics giant Dubai Ports World manages multiple giant ports across the continent. These projects have bolstered its position as the interlocutor between Africa and Asia. UAE is particularly focused on port access along the Red Sea, and DP World is set to capitalize on Ethiopia's 2024 agreement with semi-autonomous Somaliland to operate the port in Berbera.

Qatar

Qatar is committed to expanding its diplomatic and economic influence across the continent, including its economic investments, as part of a broader strategy to diversify beyond the Gulf region. Qatar's involvement in Africa is often characterized by operating on the opposing side from Saudi Arabia and the UAE, including in Somalia and Libya. Qatar strategically leverages its financial resources to gain influence in resource-rich African nations.

Historical Context

- **GCC Rift:** In 2017, the Arab League—led by Saudi Arabia—started a 43-month blockade of Qatar. The dispute was the result of long-standing tensions due to Qatar's "support of Islamist movements, including the Muslim Brotherhood, and its perceived tolerance of Saudi Arabia's arch-rival, Iran."⁹² Numerous African nations sided with Saudi Arabia and the Gulf Cooperation Council (GCC), severing or reducing diplomatic ties with Qatar, including Egypt, Mauritania, Mauritius, Sudan, Senegal, Djibouti, Chad, and Niger.⁹³ Although the formal blockade of Qatar ended in 2021, Qatari relations with African nations that sided with Saudi Arabia have not fully recovered.
- **Somalia:** One of Qatar's strongest ties on the continent is with Somalia. Their relationship stretches back to 1970, when the countries first formalized ties. The partnership was deepened during the GCC rift when the Qatar found a friendly foreign partner in Mohammed Abdullahi Mohamed, aka Farmajo. There is substantial evidence that Qatar funded the successful presidential campaign of Farmajo in 2017; in the election, the UAE backed the incumbent Hassan Sheikh Mohamud.⁹⁴ Significant aid continued to flow from Doha to Mogadishu until the Presidential election of 2022 when Mohamud ousted Farmajo.⁹⁵

Diplomatic Efforts

- **State Visits:** In December 2018, the Emir of Qatar, Sheikh Tamim bin Hamad al-Thani, demonstrated Qatar's commitment to West Africa when he visited six African nations: Senegal, Mali, Cote d'Ivoire, Burkina Faso, and Ghana.⁹⁶ Qatar has hosted several state-level visits from African partners in the last two years, notably Sierra Leone in 2022,⁹⁷ South Africa in 2023,⁹⁸ and Somalia and Rwanda in 2024.⁹⁹ Qatar has also increased its number of embassies across the continent in a continued commitment to enhancing diplomatic ties.¹⁰⁰
- **Mediator:** Qatar has repeatedly served as a mediator in African conflicts by hosting negotiations in Doha. In 2010, it mediated a border dispute between Djibouti and Eritrea.¹⁰¹ In 2011, Qatar was pivotal in mediating the Darfur peace agreement by hosting the Sudanese government and various rebel factions to reach a comprehensive settlement, the Doha Document for Peace in Darfur (DDPD).¹⁰² In 2016, Qatar helped broker a deal that saw four Djiboutian prisoners released from eight years in Eritrean captivity.¹⁰³ In 2021, Qatar brokered the resumption of diplomatic ties between Kenya and Somalia.¹⁰⁴ In 2022, Qatar mediated a peace agreement in Chad between Chad's ruling transitional military council and more than 40 opposition parties.¹⁰⁵

Security Engagement

- **Financing and Training the Somali National Army (SNA):** Qatar is one of the main funders of the SNA, and senior leadership of both militaries meet consistently.¹⁰⁶ Qatari soldiers train SNA leadership in Qatar and have also been photographed training the SNA in Turkey.^{107,108} Starting in 2007, the African Union Mission in Somalia (AMISOM) was responsible for training the Somali security forces as part of a broader mandate to stabilize the country. In 2022, AMISOM was replaced by the African Union Transition Mission in Somalia (ATMIS). Somalia is preparing to take over security responsibilities from ATMIS by the end of 2024,¹⁰⁹ making Qatar's training of the SNA even more critical.
- **Deployments:** Qatari troops have periodically been deployed in various locations in East Africa, but there is no current permanent military presence or established base in the region. Qatar did provide peacekeeping support along the Djibouti-Eritrea border, but withdrew its 450 troops in 2017 when Eritrea followed a Saudi-led alliance to cut ties with Qatar.¹¹⁰
- **Mali:** Qatar's military assistance is not limited to the Horn of Africa. In 2019, Qatar airlifted 24 armored vehicles to Mali to support counter-terrorism operations and the G5 Sahel.¹¹¹
- **Libya:** In 2011, Qatar intervened in Libya, supporting rebels to oust Colonel Muammar Gaddafi, Libya's long-standing dictator.¹¹² In the following decade, Qatar and Turkey have supported the UN-backed Government of National Accord (GNA), directly opposing the Tobruk-based Libyan National Army (LNA), which is supported by Russia, Egypt, Saudi Arabia, the UAE, and France.^{113 114}

Economic Ties

- **Qatar Africa Business Forum:** The Qatar Africa Business Forum (QABF) serves as a platform for enhancing economic and investment relationships between Qatar and various African countries, focusing on sectors like infrastructure, energy, and technology. The first QABF was hosted in Qatar in 2022; the second was in Rwanda a year later. Critical minerals were a 2023 QABF agenda item, and Qatar has taken initial steps to invest in lithium mining agreements with Nigeria.^{115,116} The next QABF is scheduled for Morocco in November 2024.¹¹⁷
- **Qatar Airlines:** Qatar Airways has passenger flights to 31 destinations in Africa, putting it ahead of the Emirate's 22 locations but still far behind Turkish Airlines' 55 routes. Qatar Airways increased the number of passengers on African flights by 60% from 2019 to 2022.^{118,119} Furthermore, Qatar Airways invested \$1.3 billion to acquire 49% of RwandaAir and a 60% stake in Rwanda's new international airport.¹²⁰ Such investment is a cornerstone of the growing bilateral relationship between Doha and Kigali.¹²¹
- **South Africa:** South Africa is Qatar's most important economic partner on the continent and represents the largest trade volume.ⁱ In addition to exporting oil, Qatar also provides fertilizers and plastics, and imports South African meat, fruit, and other food products. The Qatar–South Africa Business Forum was established in 2022 primarily to facilitate trade discussions between the two countries.¹²²

ⁱ South Africa was Qatar's 29th highest importer, a marginal amount compared to Qatar's larger trading partners, but still the largest among African countries according to [Trading Economics](#).

Brazil

Brazil's quest for deeper South-South economic and diplomatic ties has strengthened relations with Africa. President Luiz Inácio Lula da Silva has partnered with the AU and national governments to call for updating post-World War II international institutions with greater Global South representation.

Historical Context

- **Shared Colonial Legacy:** Brazil's relations with Africa trace back to the trans-Atlantic slave trade. Nearly 40% of all black Africans forcibly brought to the Americas ended up in Brazil, more than any other country.¹²³ Their descendants, the Afro-Brazilian population, have had a profound impact on Brazilian culture. *Capoeira* (a Brazilian martial art and dance), *candomblé* (a Brazilian religion), and samba music trace their origins to Yoruba traditions practiced by enslaved Africans in Brazil.^{124,125}
- **Lusophone Ties:** Brazil's ties with other Portuguese colonies, especially those in Africa, such as Angola and Cape Verde, have historically been very strong.ⁱⁱ The 1825 Friendship and Alliance Treaty between Portugal and Brazil, recognizing Brazil's independence, included a clause in which the new nation agreed not to accept any proposals by Portuguese colonies to become part of the Brazilian empire. This shared history facilitates maritime security collaboration and trade today.
- **Self-Determination:** During the presidency of Jânio Quadros in the decade after WWII, Brazil firmly supported independence movements in Africa, establishing embassies across the continent and appointing the first African-Brazilian Ambassador in 1961. However, both the Brazilian military coup in 1964 and strengthening ties with Portugal impeded deeper Afro-Brazilian integration until the return of Brazilian democracy in the 1980s.

Diplomatic Efforts

- **BRICS:** Brazil and South Africa, both founding members of the international organization, have long supported expansion to include other Global South nations. The official inclusion of Egypt and Ethiopia into the group in January 2024 will likely deepen Brazil's diplomatic and economic ties to the continent. A comprehensive analysis of the BRICS and Africa can be found on page 37.
- **Nonalignment:** Brazil has remained committed to nonalignment in global conflicts and has found sympathetic positions in Africa, especially in opposition to U.S. efforts to rally global anti-Russian support after the invasion of Ukraine. Brazil's foreign minister has repeatedly explained that Brazil "will not take sides over Russia's invasion of Ukraine" while holding a position "on the side of world peace."¹²⁶ Such a position has been well-received by leaders of African nations refusing to side with the North Atlantic Treaty Organization (NATO) and ignoring economic sanctions against Russia.

ⁱⁱ "Lusophone" refers to Portuguese-speaking countries, which include the African nations of Angola, Cabo Verde (Cape Verde), Equatorial Guinea, Guinea-Bissau, Mozambique, and São Tomé and Príncipe.

- **Multilateral Support for Updated Institutions:** Brazil and President Lula have long defended multilateralism in global affairs.¹²⁷ In his 2023 inaugural address, Lula called for “dialogue, multilateralism, and multipolarity.”¹²⁸ He was well-received when attending the African Summit in February 2024, primarily because he strongly advocated AU inclusion into the G20.¹²⁹ By deepening diplomatic ties with African and other Global South countries, Brazil aims to re-shape international institutions to reflect post-Cold War realities, positioning itself as a global player and leader in the South Atlantic.^{130,131,iii}

Security Engagement

- **Peacekeeping Operations:** Brazil has played an active role in UN peacekeeping missions, including those in Africa. Since 2015, it has led the UN Stabilization Mission in the Democratic Republic of Congo and has participated in operations in the Central African Republic, Western Sahara, and Sudan.¹³²
- **ZOPACAS:** The Zone of Peace and Cooperation in the South Atlantic (ZOPACAS) is a UN-backed initiative to support cooperation and collective peace in the region, signed by 24 South American and African Nations in 1986. Brazil has been a critical leader of ZOPACAS, strengthening relationships with African coastal countries through joint training events and security discussions. The Brazilian Marine Corps established advisory groups in Namibia and the archipelago country of São Tomé and Príncipe to boost the capacity of their amphibious forces.

Economic Ties

- **Trans-Atlantic Trade:** In 2022, Brazil-Africa trade reached roughly \$22.4 billion, according to the African Development Bank (AfDB), although this remains below a peak of \$28.5 billion in 2013. Despite strong ties to other former Portuguese colonies, 22% of Brazilian exports were sold to Egypt, more than any other African country.¹³³
- **International Drug Trade:** Brazilian gangs control the export of cocaine from South America to West Africa and often on to Europe. The largest, the First Capital Command (PCC), has become a significant player in West Africa, partnering with African criminal networks and even controlling neighborhoods in Abuja and Lagos.¹³⁴ According to one report, over 60 percent of drug shipments from Brazil were either “destined for or shipped through countries in West Africa enroute to Europe.”¹³⁵ PCC also maintains bases in South Africa, a prominent African market and a critical point for service into India and China.¹³⁶ PCC’s scale has increased efficiency and lowered costs across the global market.¹³⁷
- **Private Sector Development:** In April 2024, Brazil joined the Lusophone Compact, a program to accelerate private sector development in Portuguese-speaking African nations. The Compact is an AfDB initiative launched in late 2018, supported by \$436 million in financing from the Portuguese government and through partnerships with organizations, including the International Finance Corporation (IFC), a component of the World Bank Group. In October 2024, São Paulo will host the Brazil Africa Forum to boost sustainable infrastructure development in both regions through leadership dialogue and partnerships with firms, private capital, and civil society stakeholders.¹³⁸

ⁱⁱⁱ Brazil’s intentions of focusing on the South Atlantic were also outlined in the National Defense Policy, National Defense Strategy, and Defense White Book.

Japan

Japan aims to counter China's influence in Africa by enhancing security cooperation and obtaining critical minerals to ensure supply chain resilience and energy diversification. Additionally, Japan hopes to foster sustainable development through high-level diplomatic engagement, economic investments, and education initiatives.

Historical Context

- **Emphasis on Development:** Following its rapid economic growth in the 1970s and 80s, Japan emerged as a key player in Official Development Assistance (ODA) and foreign investment more broadly. Initially focusing on ventures in Asia, Japan expanded its reach across Southeast Asia and, as South Korea, Singapore, and Taiwan industrialized, into Africa.¹³⁹ The government of Japan has announced two fundamental principles for its assistance programs in Africa: “quality growth (inclusiveness, sustainability, and resilience) and human security (capacity building focusing on each individual in Africa).”¹⁴⁰
- **TICAD:** One of the most significant and prominent features of Japan-Africa engagement is the Tokyo International Conference on African Development (TICAD). The conference was first held in 1993 and is intended to help promote high-level dialogue on development. Its origins trace back to the end of the Cold War when Japanese ODA contributions were the highest globally.¹⁴¹ Co-hosted with the United Nations Development Programme (UNDP), the event brings together heads of state and government from Africa, Japan, the UN, and the World Bank to mobilize and sustain “support for Africa’s development under the principles of African “ownership” and international “partnership.”¹⁴² At the eighth TICAD in 2022, Japan pledged \$30 billion in assistance,¹⁴³ culminating in 92 MOUs between Japanese and African companies.¹⁴⁴ The ninth TICAD is slated for 2025 in Yokohama.
- **Countering China:** Part of Japan’s overarching strategy for the continent is to be a counterweight to China. A senior official from the Foreign Ministry explained his country’s approach, “unlike China, Japan is providing support with a keen understanding of the recipient side’s perspective,” emphasizing commitments to human resource development.¹⁴⁵

Diplomatic Efforts

- **Support Rules-Based International Order:** When Japan hosted the Global 7 (G7) summit in May, 2023, Japanese Prime Minister Kishida Fumio led calls for strengthened partnerships with Africa.¹⁴⁶ By courting all 54 African countries (or more than 25% of all UN members), Japan hopes to build support for a free and open international order for the Global South that also deters further unlawful Chinese expansion or an invasion of Taiwan.¹⁴⁷ This strategy has its roots in decades of diplomatic posturing to secure UN votes from African countries and further Japanese clout within the organization. Many TICAD keynote speeches have served as joint messages to stress the importance of a liberal international order.¹⁴⁸
- **High Level Visits:** Prime Minister Kishida Fumio traveled to Egypt, Ghana, Kenya, and Mozambique in 2023. In addition to emphasizing Japan’s commitment to African development, Fumio’s decision to visit Ghana and Mozambique likely signaled an intention to explore avenues for collaboration in UN reform because Ghana and Mozambique were non-permanent members of the United Nations Security Council (UNSC) at the time of the visit, along with Japan.¹⁴⁹

- **Education:** The Japan International Cooperation Agency (JICA) has a continent-wide initiative to expand access to education, improve education quality, and strengthen school management. Since 1985, the Government of Japan has helped build approximately 18,000 classrooms in over 27 African countries. According to JICA, from 2013 to 2018, one in ten primary and lower secondary school children in Africa benefited from JICA's Education Cooperation.¹⁵⁰

Security Engagement

- **Maintaining Free & Open Seas:** Since the sixth TICAD, Japan and its African partners have included as an explicit aim “maintaining a rules-based maritime order in accordance with the principles of international law.”¹⁵¹ For Japan, maintaining such a norm is critical to deter Chinese expansion in the Pacific and leverages Japan's military strength as a naval power.
- **Base in Djibouti:** Destroyers from the Japan Self-Defense Force (JSDF) began counter-piracy operations off the Horn of Africa in 2009. In 2011, as part of an effort to tackle piracy in the Gulf of Aden, JSDF Base Djibouti was established—Japan's first post-war overseas military base.¹⁵² Amidst ongoing turmoil in Sudan in April 2023, the JSDF used Djibouti as a staging ground for aircraft to evacuate Japanese civilians from Sudan.¹⁵³
- **UN PKO:** Since 2011, Japan has deployed four JSDF personnel as staff officers in the UN Mission in South Sudan (UNMISS). The JSDF has also deployed with the UN to Mozambique, Sudan, and Egypt. According to Japan, they are the third largest financial donor to UN Peacekeeping after the U.S. and China.¹⁵⁴
- **Potential Military Sales:** Following WWII, Japan restricted itself from most arms exports under its pacifist constitution. A significant policy shift in December 2023 allowed Japan to sell 80 types of lethal weapons and components to assist U.S. aid to Ukraine. This move paved the way for Japan to sell the American-designed Patriot missiles back to the U.S. to replenish U.S. munition stockpiles that Washington had sent to Kyiv.¹⁵⁵ Although there is no information that Japan is looking to engage in arm sales to African countries given the policy shift, it could become an aspect of Japan's security cooperation on the continent in the future.
- **Countering Violent Extremist Organizations (VEOs):** In 2013, ten Japanese engineers were killed in Algeria by an al-Qaeda-affiliated group, and in the following decade, Japan's security strategy has remained focused on countering terrorism in Africa.¹⁵⁶ At the 7th TICAD in 2019, Japan created the New Approach for Peace and Stability in Africa (NAPSA) as a framework to tackle terrorism by targeting the root causes of violence through bolstering institutions and governance. The Japanese Ambassador to the UN stated, “Addressing terrorism and violent extremism is one of the top priorities for Japan,” but the support remains largely financial.¹⁵⁷ In West Africa, Japan is an observer state of the G5 Sahel as of 2019. In Mozambique, PM Kishida said in May 2023 that Japan would support Mozambique financially to counter Islamic terrorism in the gas-rich region of Cabo Delgado.¹⁵⁸

Economic Ties

- **Development Assistance Loans:** Since the late 1980s, Japan has been an active member of the Development Assistance Committee (DAC) of the Organization for Economic Cooperation and Development (OECD). By providing significant ODA loans, Japan became one of the world leaders in ODA in the early 1990s.^{159,160} ODA loans to Africa, however, accounted for only 7.8 percent of all Japanese ODA, so other investment tools remain the focus of Japanese efforts in Africa. Japan's government donor arm, JICA, oversees the ODA loans, and in April 2023, JICA and the African Development Bank (AfDB) signed a \$350 million loan agreement to support Africa's private sector.^{161,162} Other Japanese public lenders have supported Turkish construction projects on the continent, offering superior quality and shorter timelines

than Chinese rivals.¹⁶³

- **Energy and Climate:** Japan is heavily involved in private sector infrastructure development, particularly in energy, such as liquefied natural gas (LNG) development in Mozambique and a hydrogen hub in Namibia.¹⁶⁴ To support such ventures, the government-affiliated Nippon Export and Investment Insurance provides special insurance to lessen investment risk.¹⁶⁵ This involvement is part of a broader strategy to deepen ties with Africa, especially in light of Japan phasing out Russian oil imports and the need to diversify energy supplies. The Africa Finance Corporation (AFC) and Mizuho, Japan's third-largest financier by assets, further agreed to co-finance additional energy infrastructure projects.¹⁶⁶ Japan launched the Green Growth Initiative with Africa (GGA) to address global warming with \$4 billion, combining public and private financing for climate adaptation and mitigation investments.
- **Trade:** Japan's market share of trade with Africa has declined over the past two decades. In 2000, Japan was seventh with over 4% of trade to the continent; however, by 2018 China and India grew their trade with the continent and Japan retained just a 2% market share of African trade.¹⁶⁷ Japan's most important trading partner on the continent is South Africa, which exports raw materials to Japan and imports cars.
- **Critical Minerals:** In 2010, China halted rare earth mineral exports to Japan, followed by global supply chain disruptions during the COVID-19 pandemic and increased energy vulnerability from Russia's invasion of Ukraine. Japan has turned to African nations to build supply chain resilience of essential commodities as it pushes to decarbonize.¹⁶⁸ During a five-country visit by Minister of Economy, Trade and Industry (METI) Yasutoshi Nishimura in August 2023, Japan solidified cooperation with Namibia, Angola, Congo, Zambia, and Madagascar.

Conflict Spectrum: Middle Powers in African Security

Middle powers are willing to pursue direct involvement in African conflicts, such as in Sudan, Libya, and Somalia, where they compete for regional influence. Fundamentally, these states rarely resolve the conflict as they pursue their own national interests.

LIBYA





The Government of National Accord (GNA), backed by the UN and based in Tripoli, is at war with the Libyan National Army (LNA), led by General Khalifa Haftar, and controls eastern Libya and parts of the south.

SUDAN

The civil war in Sudan involves clashes between the Rapid Support Forces (RSF) and the Sudanese Armed Forces (SAF) following a power struggle between military leaders.

SOMALIA

Middle powers backed competing presidential candidates in the 2022 election: Muhammad Abdullahi Muhammad, aka Farmajo, versus Hassan Sheikh Mohamud. Qatar, UAE, and Turkey are all, however, involved in funding and training Somali Security Services.

Local Actors	GNA	LNA	RSF	SAF	Farmajo	Hassan Skeikh Mohamud
Allies & External Support *	 UN  Qatar  Turkey	 Saudi Arabia  UAE  Egypt  Russia  France	 UAE  Russia	 Saudi Arabia  Egypt	 Qatar  Turkey	 UAE

**This table does not represent an exhaustive list of external support.*

Allies in Libya. Enemies in Sudan. A Spotlight on the UAE and Saudi Arabia

In Libya, the UAE and Saudi Arabia align to support Khalifa Haftar's LNA. The two Gulf countries are opposed to a GNA government forming in Libya because of its close ties with the Muslim Brotherhood and its opposition to the Madhkali and Wahhabi strains of Islam, native to the UAE and Saudi Arabia, respectively.

In Sudan, their interests diverge as the UAE backs the RSF led by Hemedti, while Saudi Arabia supports the SAF under General Abdel Fattah al-Burhan. Al-Burhan and the SAF have been involved in the Saudi-led coalition in Yemen, fighting against the Houthis. This involvement has strengthened ties between Saudi Arabia and the SAF. However, the UAE's withdrawal from Yemen and its shifting focus towards supporting local militias like the RSF in Sudan have created a divergence in interests.



North Korea

North Korea's involvement in Africa is driven by ideological alliances and historical anti-imperialist ties, which manifest in providing military training, arms supplies, and building defense infrastructure. The DPRK's strongest relationships are with former communist states such as Namibia, Angola, Uganda, Zimbabwe, and Mozambique. Additionally, the DPRK engages in illicit trade and labor deployments to mitigate the impact of international sanctions.

Historical Context

- **Ideology:** Since the Cold War, North Korea has established long-term relationships with several African countries, driven by shared anti-imperialist ideologies and support for liberation movements. North Korea's closest relationships historically have been with fellow socialist states; throughout the 20th century, North Korea extended military and civilian support to some of Africa's more radical states, including Guinea, Ethiopia, Zimbabwe, Mali, and Tanzania.
- **Anti-Imperialism Support:** During the Cold War, North Korea assisted the anti-apartheid and independence activities of South Africa's African National Congress (ANC). In Namibia, North Korea supported the South West African People's Organization (SWAPO), and this historical assistance fuels relations today. In Angola, Kim Il Sung sent three to four thousand military personnel to support the communist People's Movement for the Liberation of Angola (MPLA) in the Angolan civil war against the apartheid South African military. Zimbabwe established close ties with Pyongyang, which in the 1980s sent advisors to train leader Robert Mugabe's infamous Fifth Brigade. Especially for Namibia, Uganda, and Zimbabwe, "the DPRK was an anti-imperialist stalwart that helped their national liberation movements and provided selfless assistance to their fight against colonial power and white minority rule."¹⁶⁹

Diplomatic Efforts

- **Embassies:** Despite global sanctions, North Korea has managed to maintain diplomatic relations with several African countries through its embassies. Since the beginning of 2023, however, North Korea has closed several embassies due to financial strain, including in places where the DPRK has had relatively positive bilateral relations; Angola and Uganda were both closed in late 2023.¹⁷⁰
- **Soft Power:** North Korea's Mansudae Art Studio has built massive monuments throughout the continent, including Benin, Botswana, DRC, Mozambique, Ethiopia, Angola, Zimbabwe, and Namibia. These monuments reinforce North Korean authoritarian ideology but also provide the DPRK with much-needed funds; the Monument of the African Renaissance in Senegal, standing at 160 feet tall, is one of the largest in the world and cost the Senegalese government \$27 million.¹⁷¹

Security Engagement

- **Training:** North Korea has historically trained African military personnel, offering specialized courses in tactics, engineering, and artillery operations. A long-time ally, Uganda is one of the key historical recipients of North Korean training. Commandos from North Korea's special operations division covertly trained Uganda's elite troops in skills from martial arts to helicopter gunnery operations; DPRK has also trained Uganda's police force since 1988.¹⁷²
- **Arms Supplies:** North Korean arms sales provide a low cost, no-strings attached option for some African militaries. DPRK primarily transfers scud missiles, portable surface-to-air missiles, and radar systems. In

2004, Nigeria revealed it was in talks with North Korea to purchase high-end ballistic missiles.¹⁷³ North Korea uses its embassies and third parties to circumvent sanctions for arms trade. Until North Korean arms sales to Egypt were exposed in 2017, DPRK routinely used its embassy in Cairo to transfer arms to Egypt and onward to other African countries.¹⁷⁴ In addition to Egypt, a 2017 UN report found North Korea supplied Sudan with sophisticated air-to-ground missiles and signed a contract with Mozambique for surface-to-air missiles.¹⁷⁵

▷ **Russian Arms Transfers:** North Korea has used the Wagner Group to transfer weapons to Russia, primarily to aid in the war in Ukraine. Nations in Africa where both North Korea and Wagner operate—like Sudan—offer an easy facilitation point for North Korea to smuggle arms to Russia and earn revenue.¹⁷⁶

- **Indigenous Defense Infrastructures:** North Korea has also been involved in developing African defense industries and contributing to local armament production. The same 2017 UN report mentioned above explained that North Korea worked on a project in Namibia to build a munitions plant using North Korean laborers and components.¹⁷⁷ In addition to building statues, Mansudae ran large construction operations in several African nations, including ammunition factories.¹⁷⁸ In Ethiopia, North Korea modernized complexes of two of Ethiopia's largest weapons manufacturers: the Gafat Armament Industry and the Homicho Ammunition Industry.¹⁷⁹

Economic Ties

- **Illicit Trade:** A March 2021 UN Panel of Experts called out South Africa, the DRC, Eritrea, Somalia, Uganda, and Nigeria as potential violators of UN sanctions against North Korea. Although the dollar figure is low—"African countries import \$100 million of North Korean goods and export \$17.5 million in goods to Pyongyang"—even such modest trade volumes provide valuable resources to a regime short on cash.¹⁸⁰ According to the Institute for Security Studies, DPRK-Africa trade generated an average of \$216.5 million annually from 2007 to 2015.¹⁸¹ North Korean diplomats also likely smuggle ivory out of Africa as an intermediary to Chinese black markets in exchange for hard currency.¹⁸²
- **Commodities Trade:** According to trade data from the Observatory of Economic Complexity (OEC), African trading partners are the second highest importers and exporters with DPRK, behind only China. In 2022, North Korea exported over \$50 million of metal ore and alloys in exchange for foodstuffs and raw materials.¹⁸³ Mozambique has a historically high portion of North Korean exports, importing transformers and other machinery.¹⁸⁴
- **Labor:** North Korea has sent workers to African countries where they have been involved in various construction and healthcare projects. As of 2021, Angola had the most North Korean guest workers; UNSC Resolution 2397 called for the repatriation of these workers in December 2019, and slowly, African nations are deporting the workers.¹⁸⁵

Turkey^{iv}

Over the past two decades, Turkey has expanded its influence in Africa as part of larger efforts to cast itself as a global actor. Ankara's ties to the continent are strong and broad, including robust diplomatic channels, economic and security cooperation, and trade and investment flows. These ties are enhanced by Ankara's portrayal of itself as distinct from former colonial powers because of its shared cultural and religious practices. It is creating "pockets of influence" where it challenges traditional powers and rising ones.¹⁸⁶

Historical Context

- **Legacy of Ottoman Empire:** Ruling the southern Mediterranean coast and Egypt, the Ottoman Turks were the trade interlocutor between the continent and Eurasia for centuries. The empire helped spread Islam and other cultural practices, so North African and Anatolian customs remained similar. President Recep Tayyip Erdoğan has emphasized this shared history, describing Turkey as an “Afro-Eurasian” state, casting it as an alternative to both the West and China.¹⁸⁷

Diplomatic Efforts

- **Africa Partnership Policy (APP):** Turkey's interest in Africa began in the early 2000s, yet it has accelerated since 2016 amidst souring relations with the West.^v President Erdoğan has demonstrated this commitment by visiting the continent over 60 times, first as Prime Minister (2003-2014), and later as President (2014-present).¹⁸⁸ As President, Erdoğan reframed the country's foreign policy towards Africa, announcing a new Africa Partnership Policy. Implemented in 2013, its motto is “African solutions for African problems.”¹⁸⁹ The framework seeks to facilitate “peace, stability, economic and social development of the Continent” and enhance “bilateral relations on the basis of equal partnership and mutual benefit.”¹⁹⁰ In 2022, Turkey further emphasized “political, humanitarian, economic, and cultural relations” with the continent.¹⁹¹
- **Strengthening Diplomatic Ties:** Ankara announced its “Year of Africa” foreign policy agenda in 2005 and has continued to deliberately deepen ties with the continent.¹⁹² In early 2008, the AU declared Turkey a “strategic partner” and drafted the first five-year Joint Implementation Plan, outlining development projects that were later captured in the 2013 APP.¹⁹³ Ankara has also opened 32 embassies in Africa since 2009, a significant move from just 12 to 44 in less than fifteen years.¹⁹⁴ This has been reciprocated, as African embassies in Ankara have tripled in roughly the same period, and over 14,000 students from the continent have received scholarships to study in Turkey.¹⁹⁵
- **Soft Power:** Turkish soap operas have become popular on the continent, and its state propaganda television channel, the Turkey Radio and Television Corporation (TRT), is broadcast in French, an official language in many African countries.¹⁹⁶ Turkey's Maarif Foundation, a state-run organization established in 2016, educates over 17,500 African students in 191 schools across 25 countries.^{197,198} Both mechanisms help elevate Turkey's diplomatic talking points and aim to foster increased favorability among African populations.

^{iv} Simon Seroussi, as noted in the Acknowledgments section, contributed important research to this country study.

^v The European Parliament voted overwhelmingly to suspend EU accession talks with Turkey because of the government's crackdown following a coup attempt in the summer of 2016, according to the [BBC](#).

Security Engagement

- **Somalia:** The Horn of Africa has become a venue for a proxy struggle between Turkey and Qatar against Saudi Arabia (and often the UAE). Ankara operates its largest overseas military facility at the TURKSOM base in Mogadishu, where it trains local government security forces.¹⁹⁹ It formalized relations via a 2024 bilateral defense agreement with the Somali National Army (SNA) to help patrol the coastline and support regional maritime trade;²⁰⁰ the same treaty confirmed continued training of the Gorgor Special Forces unit.²⁰¹ Enhanced security has enabled foreign investment: the largest hospital in Mogadishu is named after Turkey's president Erdoğan; Mogadishu's port is managed by the Turkish Albayrak Group through 2034;²⁰² the capital's Aden Abdulle International Airport was acquired by Favori LLC, another Turkish firm, in 2013.²⁰³ Furthermore, Ankara hosts a growing Somali diaspora, where immigrants send remittances home.²⁰⁴
- **Libyan Civil War:** Ankara has sent soldiers to support the UN-recognized, Tripoli-based Government of National Accord (GNA) in its fight against General Khalifa al-Haftar's Libyan National Army (LNA), which Egypt, France, Russia, and the UAE back.²⁰⁵ In contrast to Saudi Arabia and the UAE, President Erdoğan has long favored the Muslim Brotherhood, including endorsing former Egyptian President Mohamed Morsi.²⁰⁶ However, France has accused Turkey of violating the UN arms embargo against Libya in the process.²⁰⁷
- **The Sahel & Maghreb:** Mr. Erdoğan has fanned existing anti-French sentiment in the region to gain public support and legitimacy, via official statements at summits or TRT's programming. Ankara has also signed bilateral military deals with several countries, including Nigeria, Senegal, and Togo, who draw parallels between their domestic concerns and Turkey's struggles with the Kurdistan Workers' Party; these states value learning from Ankara's counterinsurgency experience in Syria.²⁰⁸ Yet reports suggest that despite competing for regional influence, Turkey remains aligned with France, generally opposing the same militant groups and supporting the same governments. For example, Turkey supported the now-overthrown Nigerien government with armed drones, a position in line with France and the rest of NATO.²⁰⁹
- **Weapons Sales:** Turkey has established itself as a crucial arms exporter to African militaries. According to a report from the Stockholm International Peace Research Institute (SIPRI), it was the fourth largest supplier to Sub-Saharan Africa, behind China, Russia, and France, boosted by a 455% year-on-year increase in exports from 2020 to 2021.^{210,211} As additional analysis from the Stiftung Wissenschaft und Politik (SWP), a Berlin-based think tank, explains, Ankara's foreign policy "combines security and economy, in a way reinforcing each other in its political design," with arms sales and cooperation agreements often going hand-in-hand.²¹²
 - ▷ **Drones:** Turkish-made Bayraktar TB2 and Akinci drones, having demonstrated their effectiveness in Ukraine, Azerbaijan, and by the GNA in Libya; they have also been purchased by many Sahelian governments as a cheaper alternative to developing manned air power.²¹³ In fighting regional terrorist groups such as Boko Haram, ISWA, and JNIM, who are highly mobile through the scrubby terrain, the drones enable aerial surveillance and have a payload to execute strikes.^{vi}
 - ▷ **Vehicles:** Katmerciler, another Turkish firm, has sold hundreds of its Hizir 4x4 Tactical Wheeled Armored Vehicles in Africa. These vehicles offer increased survivability against IEDs for troops fighting insurgents.²¹⁴

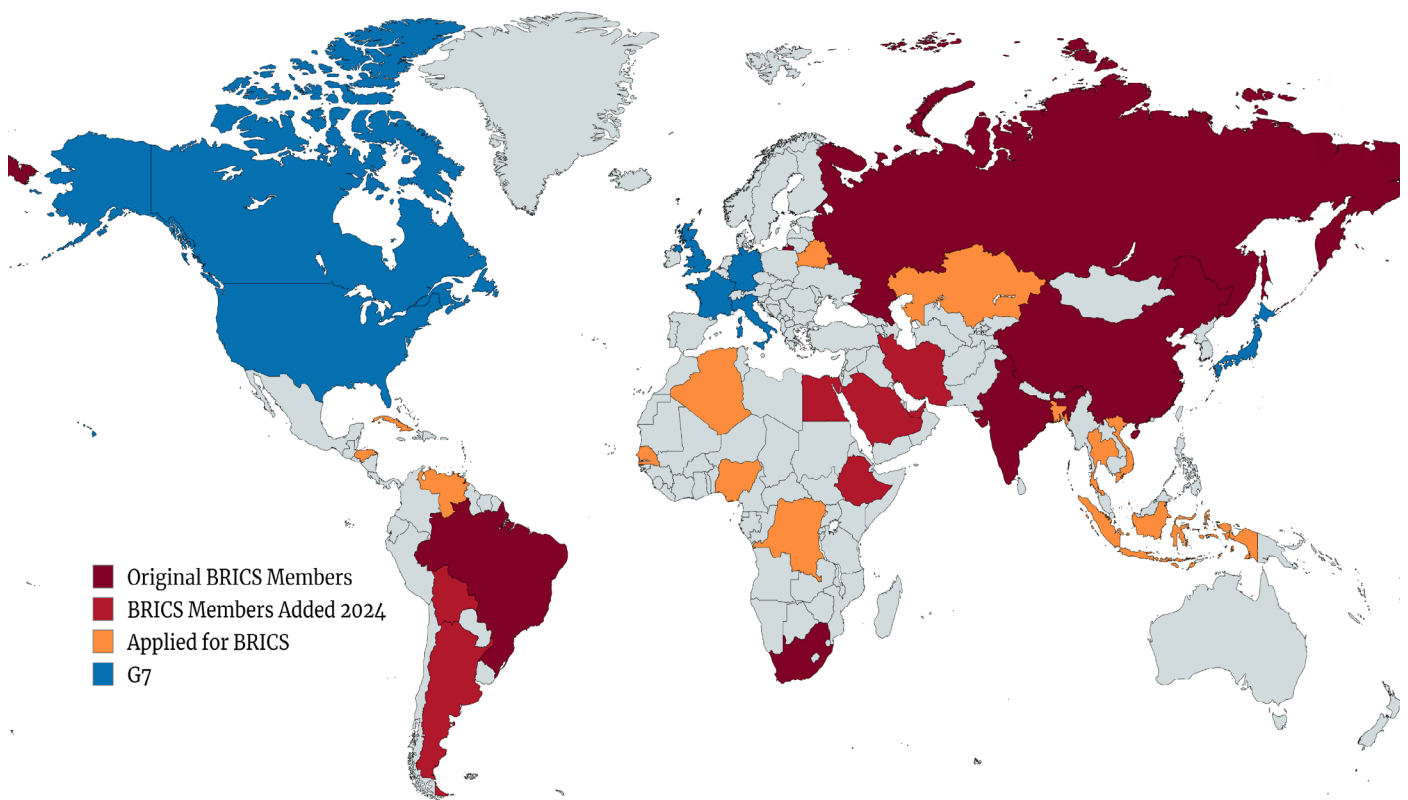
^{vi} ISWA is Islamic State's branch in West Africa, while Jama'at Nasr al-Islam wal Muslimin (JNIM) is al-Qaeda's affiliate in the Sahel.

Economic Ties

- **Trade & Travel:** Trade between Turkey and the African continent has grown more than seven-fold since the launch of the African Initiative Policy, jumping from \$4.09 billion in 2000 to over \$40 billion in 2022.^{215,216} Although trade remains concentrated in North Africa, it has continued to expand across the continent. Turkey has signed five free trade agreements with African partners in the last few decades: Egypt, Sudan, Morocco, Tunisia, and Mauritius.²¹⁷ This is facilitated by Joint Business Councils in 45 African countries and as many bilateral Trade and Economic Cooperation Agreements.^{218,219} Turkish Airlines massively developed its outreach to Africa, and today it flies to 59 destinations on the continent, servicing more African countries (36) than any other airline.²²⁰
- **Construction & Economic Investment:** Turkish construction firms have capitalized on a drop in Chinese Belt & Road Initiative (BRI) spending. An Economist report estimated Ankara has spent over \$78 billion on infrastructure projects, sports stadiums, and mosques, including a \$1.9 billion contract to complete a rail line linking Dar es Salaam to Lake Victoria in Tanzania.²²¹ In contrast to their Chinese rivals, Turkish firms hire local workers, providing jobs (and experience) to local contractors, thereby increasing their appeal to local government officials.²²²
- **Energy:** Karpowership, a Turkish company that provides electricity directly from its floating natural gas-powered generators, operates in eight African countries and plans to increase to fifteen more.²²³ Its ability to rapidly provide relatively cheap power and cleaner energy than coal to national grids without capital spending on infrastructure makes it an attractive partner to many governments. However, it has come under scrutiny for cutting power to the capitals of Sierra Leone and Guinea-Bissau when their governments failed to pay their bills.²²⁴ Earlier this year, Ankara penned a deal with its partners in Mogadishu to explore, develop, and produce both onshore and offshore oil.²²⁵
- **Public Sector Development Aid:** The Turkish Cooperation and Coordination Agency (TİKA), Turkey's federal agency for foreign aid distribution, has 22 offices on the continent and has conducted more than 7,000 development projects.²²⁶ Religious charity organizations amplify these efforts, building schools and madrasas, distributing food, and offering free healthcare.²²⁷ Both help reinforce Turkey as a well-received diplomatic partner.

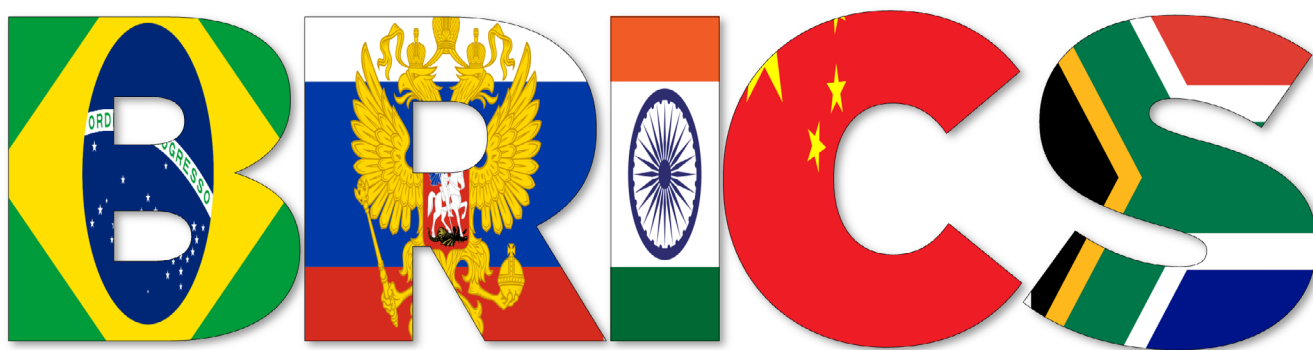
BRICS Expansion and Africa

BRICS is an economic and political coalition of five major emerging economies—Brazil, Russia, India, China, and South Africa—that aims to promote cooperation, development, and reform of international financial institutions.



The group has expanded its influence in Africa through increased investments, infrastructure projects, and strategic partnerships, leveraging the continent's resources and markets to bolster economic growth and development.

Ethiopia and Egypt joined in 2024, and numerous other African countries are seeking future membership.



BRICS, Middle Powers, and Africa

Originally consisting of Brazil, Russia, India, and China, the first BRICS expansion in 2011 incorporated **South Africa** into what was essentially a foreign investment club at the time.²²⁸ This move enabled other members (especially China) to deepen trade relations with the continent's largest economy. It also signaled that the club was pivoting from a coalition of large, non-Anglo-European economies into a political body to counterbalance against the West, while representing emerging markets across Africa, Asia, and South America.

Institutional Reform

A key objective for the bloc is to update international institutions to reflect post-Cold War realities. **India** and **Brazil** have repeatedly called for seats on the UNSC, supported AU inclusion in the G20, and pushed for reform of the Bretton Woods financial institutions.^{vii} India, Brazil, and South Africa have also expressed a shared resolve to reform the UN to reflect contemporary geopolitical realities via the 2003 Brasília Declaration. **South Africa**, along with new members **Egypt** and **Ethiopia**, is a signatory of the Ezulwini Consensus, in which the AU calls for permanent African representation on the UNSC.²²⁹

Global South Expansion

Brazil and **South Africa** have been vocal proponents of BRICS expansion to include other non-Western emerging economies. This was realized in January 2024 when **Egypt**, **Ethiopia**, **Iran**, and the **United Arab Emirates** officially joined the bloc. Although **Saudi Arabia** was offered membership in late 2023, it has yet to formally accept.^{viii} This enlargement is expected to foster deeper diplomatic and economic ties between middle power member states and the continent.²³⁰

Economic Development and Trade

The 2024 expansion of BRICS is poised to significantly impact economic development and trade. The New Development Bank, launched by the BRICS as an alternative to the Western-controlled International Monetary Fund (IMF) and World Bank, has already financed infrastructure projects in member states and beyond, including many in Africa. With the expansion, Gulf investors may now use the institution to fund further infrastructure and energy projects within the Red Sea and Horn of Africa nations, thereby amplifying BRICS's influence on global economic dynamics.

^{vii} These include the International Monetary Fund (IMF), World Bank, and World Trade Organization (WTO).

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