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**The Russia–Ukraine War’s
Shockwaves in Africa.
A *Zeitenwende* for
German Africa Policy?**

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Introduction: The Russia-Ukraine War's Shockwaves in Africa

Christine Hackenesch and Wolfram Lacher

Two years after Russia's full-scale invasion of Ukraine began, the conflict has had wide-ranging consequences for international relations – to the extent that in Germany, it has been widely viewed as a *Zeitenwende* or sea change. This Working Paper examines repercussions from the Ukraine war in Africa and on German Africa policy, analysing to what extent they are in continuity with trends that preceded the war and to what extent they represent a break with past patterns. Has the Ukraine war turned out to be a sea change for Africa and German Africa policy, too?

Since the outbreak of the war, senior German officials have engaged in an intense travel diplomacy in Africa. Olaf Scholz embarked on three visits to African countries in his first two years in office – an unprecedented level of attention by a German chancellor towards the continent. In some respects, this is in line with the overall trend of the past decade. Cooperation with Africa had been higher on the agenda in Germany since 2015 – if not earlier – when the numbers of refugees and migrants to Europe increased drastically, including from Africa. Since then, German and European policymakers have also increasingly viewed Africa as an arena of geopolitical competition with China and other external actors, including Russia. However, the war has changed the way German policymakers view the continent and Germany's relations with African countries. Most importantly, there is a clearer recognition that cooperation with African countries is key to solving global challenges and in securing prosperity in Europe. The renewed interest in natural gas and other strategic resources is a case in point. There is also a growing awareness that German and European offers for cooperation need to become more attractive in an environment where African governments have a growing range of external partners to cooperate with.

Against this background, this Working Paper analyses the longer-term political and economic consequences of Russia's aggression against Ukraine. Considering both German and African perspectives, we ask: How has German Africa policy changed as a result of the war in Ukraine and to what extent are these changes congruent with African interests? The first part of the study focuses on the impact of the war on Africa's politics, economies and international relations, drawing out implications for German cooperation with African countries. The second part focuses on changes in German policies towards Africa as a result of the war. Below, we highlight key arguments and recommendations emerging from the contributions to the Working Paper.

African foreign policies

For African foreign policies, the war has not constituted the watershed moment it has represented for Germany and Europe. Western perceptions of intensified geopolitical competition in Africa have tended to benefit the continent's governments in their quest to widen their foreign policy leeway, which is in line with the pre-war trajectory of Africa's foreign

relations. However, in many African countries, the war has also contributed to more polarised domestic debates on their countries' foreign policies and on how to navigate the new geopolitical competition.

German foreign policy needs to start by acknowledging and respecting divergences in African foreign policy positioning. In addition, it needs to be cautious to not exacerbate domestic polarisation on whether to align with the West, Russia or China. Having an honest exchange that also touches upon some of the historical and racial dimensions shaping foreign positioning could be an important first step.

Economic repercussions and opportunities for Africa

Russia's invasion of Ukraine has created a triple food, energy and economic crisis on the continent. Global supply chain disruptions, particularly in the food and energy sectors, are leading to higher prices. The conflict has also exacerbated Africa's debt crisis by disrupting commodity markets, triggering widespread inflation, raising borrowing costs and increasing financial market uncertainty. Moreover, the war has contributed to geo-economic fragmentation globally, which could have an adverse effect on Africa.

At the same time, Europe's drive to reduce its reliance on Russian oil and gas and to bolster its long-term energy transition prospects has spurred exploration of alternative suppliers, particularly African countries. Africa stands at a crossroads, balancing the trade-offs between contributing to Europe's energy demands and meeting its own development priorities and structural energy challenges. A balanced partnership framework, rooted in financial cooperation, technology and skills transfer, and clear guidance on an energy transition roadmap, is essential to foster a mutually beneficial energy relationship between Europe and Africa.

Challenges to food security

One of the first consequences of the war for African countries was its immediate and severe impact on food security. The war thereby exposed African countries' vulnerability to global shocks in agriculture and fertilizer imports and, more generally, to food security. It also showed how such vulnerability differed both between countries – due to variations in trade openness and availability of compensating measures – and within countries. Ensuring food supply independence and resilience to shocks have gained greater political priority as a result of the repercussions from the Ukraine war.

In the short term, Germany should monitor the unintended consequences of economic sanctions on Russia for food security and should contribute to strengthening food security by providing more food aid in close coordination with the European Union and other international actors. In the longer run, Germany should develop a more coherent approach to addressing food security by strengthening cooperation across different German ministries and by promoting alignment of German activities with African initiatives and priorities.

German foreign and security policy in Africa

While it was plausible to expect that Germany's sharp refocusing on European security would go hand in hand with declining attention towards the African continent, the opposite

proved to be the case, at least in the short term. The multi-faceted repercussions of the sea change in Europe have had the political effect of Berlin strategically upgrading relations with Africa. This was further encouraged by Russia's increasing political interest in Africa itself.

However, the questions remain as to what Germany wants from Africa (and vice versa) and what Germany has to offer compared to other external partners. Defining German interests should be a first step. Simply wanting to outdo strategic opponents would be counter-productive. Instead, global challenges that are of mutual concern are a place to begin, such as climate change or the reform of international organisations. Security and defence policy could be one area in which Germany may be able to provide a modest yet nonetheless substantial offer at both bilateral and multilateral levels. The substance and thrust of security cooperation will need to align behind local priorities and preferences. In other words, strong local demand and leadership should determine the extent of German support in the realm of capabilities, capacity building and reform.

German development policy

German development policy has been affected by the Ukraine war in several regards. The war's negative repercussions for African societies, such as in the domains of food security and misinformation, have turned into challenges for development policy to address. Development cooperation has also provided regular opportunities to discuss Russia's aggression with African countries and regional and Pan-African institutions. While the overall amount of German development assistance to Africa has so far not been reduced, some thematic areas have become more relevant, including support for food and energy security.

German development policy needs to take African priorities seriously and accept when partners adopt a different position on Russia. German development policy can retain or gain credibility with African partners not least by advocating fair global governance structures that adequately involve African partners. Finally, avoiding cuts in the development budget as a result of the war will be key to avoid losing credibility among African partners.

Germany's raw material policy in Africa

The war has further accelerated the transformation of mineral supply chains and geopolitical rivalries have fuelled global competition for access to mineral resources. Africa's mineral-rich countries have therefore received more attention from German policymakers since February 2022. In the evolving geopolitical landscape, many mineral-rich African countries find themselves in a position in which they can choose their trade partners. Countries endowed with substantial reserves of relevant scarce minerals are particularly keen to seize this opportunity to overcome their role as mere suppliers of unprocessed raw materials and to benefit more from global value chains.

German and European cooperation with Africa should aim at building longer-term partnerships to support African countries socio-economic priorities. Strengthening value addition and supporting industrialisation should become key aspects in Germany's approach to cooperating with African countries on raw material extraction. African actors and, in particular, the African Union need to further develop their priorities and objectives in cooperating with Germany, the European Union and other international actors to maximise potential benefits from external actors' competition.

Consequences of the Russia-Ukraine War for African Politics and Economies

No Sea Change: African Foreign Policies after Russia's Invasion of Ukraine

Christine Hackenesch, Cynthia Kamwengo, Wolfram Lacher and Cobus Van Staden

While Russia's invasion of Ukraine has been a critical juncture for Germany and other European countries, its political implications for African states have been mostly in continuity with already existing trends. African governments diverge on the war's causes and on how to address its consequences, but many converge in perceiving Western responses as marked by double standards and as sharing a degree of disrespect for sovereign African foreign policy positions. The war has thereby reinforced African governments' determination to voice their positions more forcefully in a multipolar context that accords them greater leverage. Western perceptions of intensified geopolitical competition in Africa have tended to benefit the continent's governments in their quest to widen their foreign policy leeway. This is in line with the pre-war trajectory of Africa's foreign relations: Not only China and Russia, but also Turkey, Saudi Arabia, United Arab Emirates (UAE) and others have strengthened their economic, political and security cooperation with African countries over the past decade. In countries, such as South Africa or Zambia, the war has contributed to more polarised domestic societal debates on how to navigate this new geopolitical competition. More broadly, the pressure to take sides in this competitive environment has brought back debates over African non-alignment. German foreign policy needs to acknowledge and respect divergences in African foreign policy positions and avoid fuelling domestic polarisation on whether to align with the West, Russia or China.

The return of non-alignment

Perceptions of the war and interpretations of what it means for world politics clearly differ between African and European governments, but also among African countries. Such differences first came to the forefront with the United Nation (UN) General Assembly's vote on condemning Russia as the aggressor in March 2022.¹ To the great surprise of Western governments, many African governments did not align their vote with Europe and the United States (US) in favour of Ukraine. While some European and US policymakers present the war as a manifestation of a systemic rivalry between democracy and autocracy, African UN voting behaviour showed that many African governments do not share this analysis: several democratic countries in Africa abstained. Moreover, the fact that African UN votes

¹ Development Reimagined, "How African Countries Voted On Calling For Just And Lasting Peace In Ukraine," 29 February 2023, accessed 29 November 2023.

caught European and US governments by surprise led to frustrations among African governments who interpreted this outcry as another sign of paternalism by Western countries that still did not recognize African countries' right to pursue independent foreign policies.

Among African societies, views on the war are clearly mixed. Public opinion surveys in Kenya, Nigeria, Uganda, Senegal, South Africa and Zambia revealed that the majority of African citizens views Russia as the aggressor and feels that the invasion is against international law.² At the same time, the majority of citizens in these countries expressed strong feelings that their continent should stay nonaligned or neutral in this conflict.

An underlying factor is the growing resistance against the centring of European conflicts in world history. Many African governments also perceive Russia's invasion as simply one more instance where a major power has violated the international rules-based order to promote its own national interests. They oppose the imposition of sanctions against Russia and denounce what they see as Western double standards.³ Some of Africa's political elite believe that Russia's actions are a justified response to NATO's eastern enlargement and that Ukraine is the site of a proxy war between Russia and the US.⁴ In broader terms, the reaction reveals a certain level of cynicism among African elites about Western framing of the conflict and indicates an erosion of Western countries' power to set global agendas.

Most African governments have taken the position of non-alignment, with many advocating for a settlement to the conflict that would presumably involve compromises with Russia's territorial ambitions.⁵ This approach has stimulated intense debates about the legacy of the Cold War – particularly in southern Africa, which is a region where the Soviet Union developed strong ties with political elites through the provision of material support to anti-colonial solidarity movements and university scholarships to enhance human resource development. Some political elites cite this history as one of the main reasons why African countries should maintain strong diplomatic relations with the Russian government (as the successor to the Soviet Union), even under the current circumstances.

Two examples in which debates about non-alignment have moved high on the political agenda are South African and Zambia. In South Africa, discussions on non-alignment must be understood against the historical background of Soviet support for the struggle against Apartheid, while some Western governments' collusion with the apartheid regime went well into the mid-1980s – only a few years before the system ended. The African National Congress (ANC) crafted the post-liberation South African government's foreign policy during the unipolar window in the 1990s and early 2000s. The Iraq war and the 2008–09 global financial crisis subsequently raised debate about Western guardianship of the global economy and rules-based order. Since the Ukraine war began, the South African government has further expanded its engagement with Russia and China under the BRICS, which has raised criticism from opposition parties.⁶ At the same time, the ANC and other southern African ruling parties have also used debates about the war to present themselves as ably navigating the new geopolitical rivalries. Meanwhile, these ruling parties face increasing public discontent over their failure to deliver post-liberation socioeconomic benefits to their citizens. For instance, the Secretary-General of South Africa's ANC has argued that his party and other liberation movements, such as the ZANU-PF in Zimbabwe and FRELIMO in Mozambique,

² Ipsos, "African Sentiment is favouring Ukraine," 30 June 2023, accessed 29 November 2023.

³ Priyal Singh, Russia–Africa relations in an age of renewed great power competition, Africa Report 42, (Institute for Security Studies, Nov, 2022), accessed 29 November 2023.

⁴ African National Congress, African National Congress 55th National Conference Resolutions: International Relations (Johannesburg: African National Congress, Dec, 2022), accessed 29 November 2023.

⁵ Priyal Singh and Denys Reva, African peace mission: one step forward, one step back? (Institute for Security Studies, Jun 23, 2023), accessed 29 November 2023.

⁶ Mmusi Maimane, "South Africa's foreign policy must be fiercely independent and not be swayed by ideology," Daily Maverick, 23 August 2023, accessed 29 November 2023.

have the necessary experience to steer their countries through rising geopolitical tensions and protect southern Africa from Western imperialism.⁷

These reactions in South Africa show that the debate about Ukraine and the larger Cold War legacy play out along racial, political and class lines. Whereas the ruling ANC and some parties on the left frame BRICS engagement as part of a larger rebalancing of Western power, centrist and centre-right critics, such as the Democratic Alliance, have raised the danger of alienation from Western allies and the loss of privileged trade access to US markets. A core issue in this debate is whether South Africa has fully abandoned its Mandela-era human rights-centred foreign policy approach and with it, its global moral leadership. The Zuma-era turn towards rising powers, such as China via South Africa's BRICS membership, complicated this question by introducing conflicting conceptions of human rights.

Similarly, in Zambia, foreign policy debates have also become more polarised since the outbreak of the war and debates on non-alignment are once again high on the country's agenda. The government has maintained its non-aligned stance whilst voting in favour of UN resolutions condemning Russia's aggression against Ukraine and calling for a peaceful resolution. However, some opposition parties have emphasized the need to increase bilateral cooperation with Russia, labelled the government a "puppet" of the West and argued that Western imperialism is the single largest threat to Africa's sovereignty and security.⁸ Some political elites have argued on social media that the West is exaggerating the extent to which Russia's prevention of grain exports is contributing to food insecurity in Africa as part of their goal of garnering support for Ukraine.⁹

Across the continent, debates about the war are also shaped by perceptions of racial discrimination. Some African perspectives on the invasion have been shaped by media coverage of the preferential treatment that European border officials gave to Ukrainian citizens over African refugees also attempting to flee across the Ukrainian-Polish border in February and March 2022.¹⁰ This injustice has generated social media debates about racism in Ukraine and Europe more generally and the notion that Africans should not concern themselves with the conflict. These debates have been boosted by news stories about European countries resettling large numbers of Ukrainian refugees, yet resettling very few refugees fleeing from conflicts in Sudan and Ethiopia. Moreover, some Ukrainian political actors made disparaging remarks about the Africa Peace Initiative and a plane carrying members of the South African president's security team was detained by Polish authorities at the start of the Africa Peace Initiative in June 2023.¹¹

These examples, while not necessarily conclusive on their own, have contributed to a wider suspicion across the African continent that the Ukraine war reveals a form of manufacturing global consent around a European-centric agenda to the detriment of action on similarly dire African crises, such as those in Sudan and the Sahel. This, together with economic ties between some African countries and China as well as – to a lesser extent – Russia, and similar non-aligned stances taken by other Global South powers, such as India, has resulted in growing discursive contestation around the early framing of the Russian

⁷ The Herald Zimbabwe (@HeraldZimbabwe), post, 5 September 2023, 12:45p.m., accessed 29 November 2023.

⁸ Cynthia Kamwengo, "Social media debates on Zambia's Evolving Relations with the West and East: Trends and Implications," *Megatrends Afrika Policy Brief* 21,06 February 2024.

⁹ Fred M'membe (Socialist Party Zambia), "Food security of Africa has never been the priority of the West," Facebook, 17 September 2023, 1:00p.m., accessed 29 November 2023.

¹⁰ Hamza Mohamed, "AU 'disturbed' by reports Africans stopped from escaping Ukraine", *Al Jazeera*, 1 March 2022, accessed 29 November 2023; Virginia Pietromarchi, "More African students decry racism at Ukrainian borders," *Al Jazeera*, 2 March 2022, accessed 29 November 2023.

¹¹ Adam Easton and Natasha Booty, "South Africa's stranded presidential security team: Poland denies racism," *BBC News*, 16 June 2023, accessed 29 November 2023; Siyabonga Sithole, "Ukraine advisor rejects Africa's involvement in European affairs," *Independent Online*, 20 Jun 2023, accessed 29 November 2023.

invasion as being primarily an issue of state sovereignty and the upholding of international law.

Navigating and exploiting the new rivalry

Russian forays into African conflicts from Libya and the Central African Republic (CAR) to Mali predate the Ukraine war, as does Western unease over these forays. But since the invasion of Ukraine, Western states' policies toward Africa have accorded far greater attention to the Russian military presence in African states. The US has made repeated – but so far unsuccessful – attempts at persuading interlocutors, such as President Touadera of CAR or Khalifa Haftar of Libya, to abandon their alliance with Russia. In both the US and Europe, the fear that African governments could turn to Russia has become a recurrent theme in policy discussions about Africa.

The new Western focus on Russia's role has opened up opportunities for African governments to exploit. Coup leaders, such as those who toppled Niger's President Mohamed Bazoum in July 2023, have been able to capitalize on Western fears that Russia would fill the void left by Western countries' departure from Africa. Such fears prompted the US, Germany and other countries to diverge from France's hardline position towards the coup in Niger.¹² In Chad, former President Idriss Déby's son Mahamat, after suspending the constitution to seize power as the transitional president retained Western support by publicizing – and likely exaggerating – the threat of a Russian-backed rebel takeover in Chad.¹³ In Sudan, the Sudanese Armed Forces (SAF) have tried to gain the support of Western states by accusing their enemy, the Rapid Support Forces (RSF), of allying with Russia.¹⁴

The polarising impact of the Ukraine war on relations between the West and Russia has therefore been clearly felt in Africa, most noticeably in the continent's conflict zones. Nevertheless, this impact has reinforced an existing trend rather than introduced any new dynamics. The availability of foreign backing from non-traditional, non-Western partners has, for some time, begun to shift power relations in favour of African governments. This has been manifested in the improved negotiating position of coup leaders beginning with the 2019 military coup in Sudan, as well as in the declining Western influence on internationalised civil wars on the continent. Russia has been only one among several external actors driving this trend, with the UAE playing at least as disruptive a role, despite being rarely singled out by Western states as such.

Russia's appeal as an alternative partner goes beyond military and economic cooperation and is not only driven by misinformation campaigns. Russia has long been among the leading providers of scholarships for African students and, according to government officials, has recently substantially expanded such scholarships.¹⁵ Ultimately, however, Russia's overall attraction as a partner for African countries is limited – most obviously regarding finance and trade, but also with regard to security cooperation. The war in Ukraine has stretched Russian capacities to provide additional security assistance in Africa, and the results of such assistance have been mixed – as seen in the deteriorating security situation

¹² Michael Crowley, "With Aid on the Line, Biden Officials Debate 'Coup' Finding for Niger," *New York Times*, Sep 6, 2023, accessed Nov 29, 2023.

¹³ Alex Thurston, "Wagner Group accused of plotting a 'confederation of states' in Africa," *Responsible Statecraft*, May 2, 2023, accessed Nov 29, 2023.

¹⁴ James Landale and Antoinette Radford, "Sudan army chief warns war could spill over into neighbours," *BBC News*, Sep 22, 2023, accessed Nov 29, 2023.

¹⁵ Global Education Monitoring Report Team, *Inclusion and education: all means all* (Paris: UNESCO, 2020), accessed Nov 29, 2023; Patrick Jack, "Russian scholarships for African students 'echo Cold War tactics'," *Times Higher Education*, Aug 9, 2023, accessed Nov 29, 2023.

in Mali following the departure of France in 2022. As of December 2023, it was unclear whether the Kremlin would maintain the Wagner model of lean, largely self-sustaining operations in Africa. Given Russia's limited capacity, it therefore remains an open question as to whether African counterparts can credibly threaten that they will turn to Russia.

What are the implications for German Africa policy?

Since the Russian invasion, German and other European policymakers see their engagement in Africa even more strongly through the lens of a systemic and geo-competition with Russia and China. Moving forward, German policymakers should start by acknowledging the diverging perceptions of how Russia's invasion of Ukraine is seen on both sides of the Mediterranean, and by better understanding the underlying factors that shape these different perceptions. Having an honest exchange that also touches upon some of the historical and racial dimensions shaping foreign positioning could be an important first step. Perceptions across African governments are far from uniform. For southern African governments, historical experiences play an important role for their positioning in the new geopolitical landscape. For some West African governments, Russia's invasion has first of all opened new policy spaces and leverage vis-à-vis Western partners.

Russia's invasion in Ukraine and the new geopolitical rivalry has led to more heightened domestic societal debates on African foreign policies in several African countries. African governments have thus been pressured not only from the outside, but also from within. In Zambia, for instance, the opposition has launched a social media campaign to portray the President as a puppet of the West, not least to improve its own position ahead of the next general elections.¹⁶ In their public communication, German and other European policymakers need to more prominently take these dynamics into account as statements from foreign actors can easily further fuel already polarised debates on how to navigate geopolitics. More generally, German and other European policymakers should avoid further pressuring African governments to take sides, thereby fuelling geopolitical rivalries in Africa. Instead, they should focus greater attention on whether their offers for cooperation are competitive and attractive for African partners.

¹⁶ Cynthia Kamwengo, "Social media debates on Zambia's Evolving Relations with the West and East: Trends and Implications," *Megatrends Afrika Policy Brief*, 06 February 2024.

The Russia-Ukraine Conflict: Economic Repercussions and Opportunities for Africa

Fahd Azaroual and Oumayma Bourhriba

The Russia-Ukraine conflict is becoming a major challenge to African economies that are already weakened by the global COVID-19 pandemic. As African countries struggle to recover from the destabilizing effects of the health crisis, Russia's invasion of Ukraine has created a triple food, energy and economic crisis on the continent. This challenging context threatens to undermine progress towards the 2030 Sustainable Development Goals and the aspirations of the African Union's Agenda 2063.

The post-COVID-19 period of economic growth in Africa is now being hampered by the direct consequences of the Russia-Ukraine war. Global supply chain disruptions, particularly in the food and energy sectors, are leading to higher prices and intensifying challenges to African food security. The conflict has also exacerbated Africa's debt crisis by disrupting commodity markets, triggering widespread inflation, raising borrowing costs, and increasing financial market uncertainty. These factors jeopardize the debt sustainability of many African countries (already strained by the COVID-19 pandemic) and they now face even more complex economic challenges. Moreover, the Russia-Ukraine war has also contributed to an escalation in geoeconomic fragmentation globally, which could have an adverse bearing on Africa. The scale of the impact on the African economy hinges on the extent of this fragmentation.

This chapter aims to delve into the impact of the Russia-Ukraine conflict on African economies, one year on, highlighting both the challenges and opportunities emerging within this evolving global geopolitical landscape.

The socioeconomic repercussions on Africa of the Russia-Ukraine war

The African continent, still grappling with the aftermath of the pandemic, faced an additional layer of uncertainty in February 2022 with Russia's invasion of Ukraine.¹⁷ This geopolitical event triggered a surge in commodity prices, disrupting the economic recovery that many African countries had begun to experience after a severe recession in 2020 caused by the COVID-19 pandemic. Russia and Ukraine, significant players in the energy, food, and fertilizer industries, became focal points of concern. The ensuing conflict has had a widespread impact on food and energy prices, adversely impacting Africa by disruptions in global value chains. Although Russia and Ukraine represent only 2.6% of Africa's total imports,¹⁸ some nations heavily depended on both countries for essential goods like wheat and fertilizers. For instance, 10 African countries import more than 50% of their wheat from Russia and Ukraine. In addition, 49% of Cameroon's fertilizer imports in 2021 were sourced from Russia (see Figure 1 and 2).

Africa's persistent inflation was further exacerbated by repercussions from the conflict in Ukraine, as well as extreme weather conditions. This resulted in a double-digit inflation rate

¹⁷ Abdelaziz Ait Ali, Fahd Azaroual, Oumayma Bourhriba, and Uri Dadush, "The Economic Implications of the War in Ukraine for Africa and Morocco," PB 11/22, Policy Center for the New South (Rabat: 28 February 2022), accessed 22 November 2023.

¹⁸ Direction of Trade Statistics dataset (DOTS), IMF, accessed 05 February 2024.

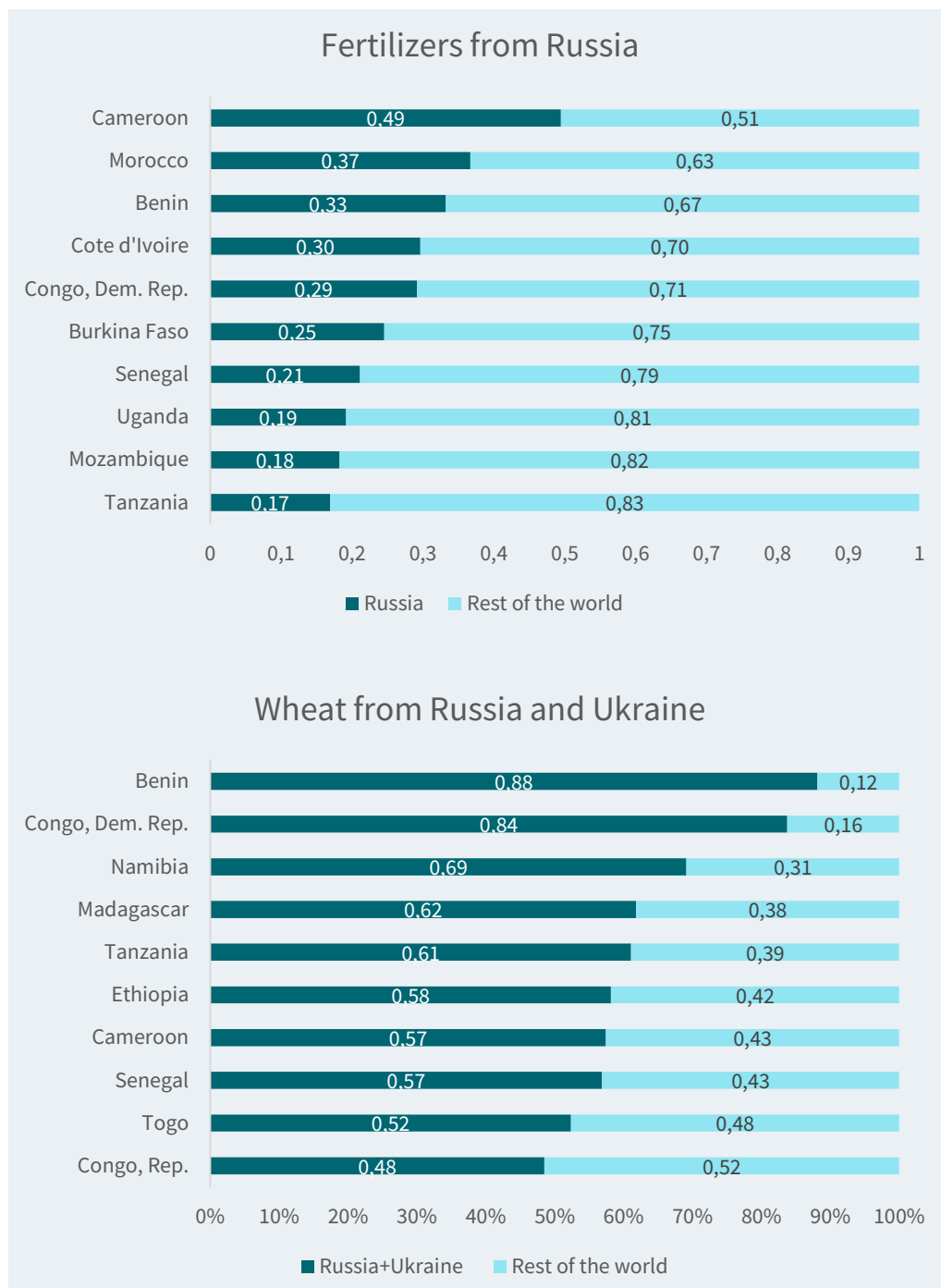


Figure 1 and 2: Top 10 African importers of fertilizers from Russia as well as wheat from Russia and Ukraine. Source: World Integrated Trade Solution (WITS), World Bank.

of 14.2% in 2022, compared to the 8.4% recorded between 2000 and 2019.¹⁹ This inflation was primarily driven by the food component, constituting nearly 40% of the region’s consumption basket.²⁰ Africa faced inflationary pressures, significant capital outflows, and currency depreciation triggered by tightening monetary policies in the advanced economies.

This confluence of events, including the persistent socioeconomic effects of the pandemic, China’s zero-COVID policy, and subdued global economic growth (especially in

¹⁹ AfDB Socio Economic Database, AfDB, accessed 05 February 2024.

²⁰ Consumer Price Index data, IMF, accessed 05 February 2024.

China and Europe, which collectively account for about 70% of total African trade)²¹ contributed to a deceleration in Africa's economic growth from 4.8% in 2021 to 3.8% in 2022. Despite this economic slowdown, the African economy's performance surpassed global economic growth in 2022 and is expected to rebound in 2023 (Figure 3).

Macroeconomic fundamentals varied across resource groupings in Africa. The slowdown of economic activity in Africa concerned 57% of African economies, mainly non-resource-intensive countries. This group of countries encountered a fallout in their economic growth by 1.9 percentage points in 2022. This was largely attributed to the effects of higher food and energy prices on household consumption, exchange rate depreciation,²² and subdued external demand. The current account deficit for these economies deteriorated to 7.6% in 2022 from 5.4% in 2021. On the other hand, the oil-exporters group has recorded a modest slowdown compared to others (Figure 4). For instance, 64% of countries from this group has experienced positive change in their real GDP growth in 2022. Although the substantial surge in energy prices was expected to be beneficial for the oil-exporting countries due to favorable terms of trade, it was nevertheless offset by the steady decline in oil production in Nigeria, representing 30% of the output of oil exporters in the region.²³ Yet this group showed a notable current account improvement, shifting from a deficit of 1.1% in 2021 to a surplus of 1.4% of GDP in 2022 (Figure 5). On the fiscal front, the different resource groups have recorded a decline in their fiscal deficit, but at different rates. The fiscal deficit narrowed more significantly for oil-exporting countries compared to other groups, reflecting a substantial improvement in revenues due to the rise in oil prices (Figure 6).

The surge in international food and energy prices eroded household purchasing power,

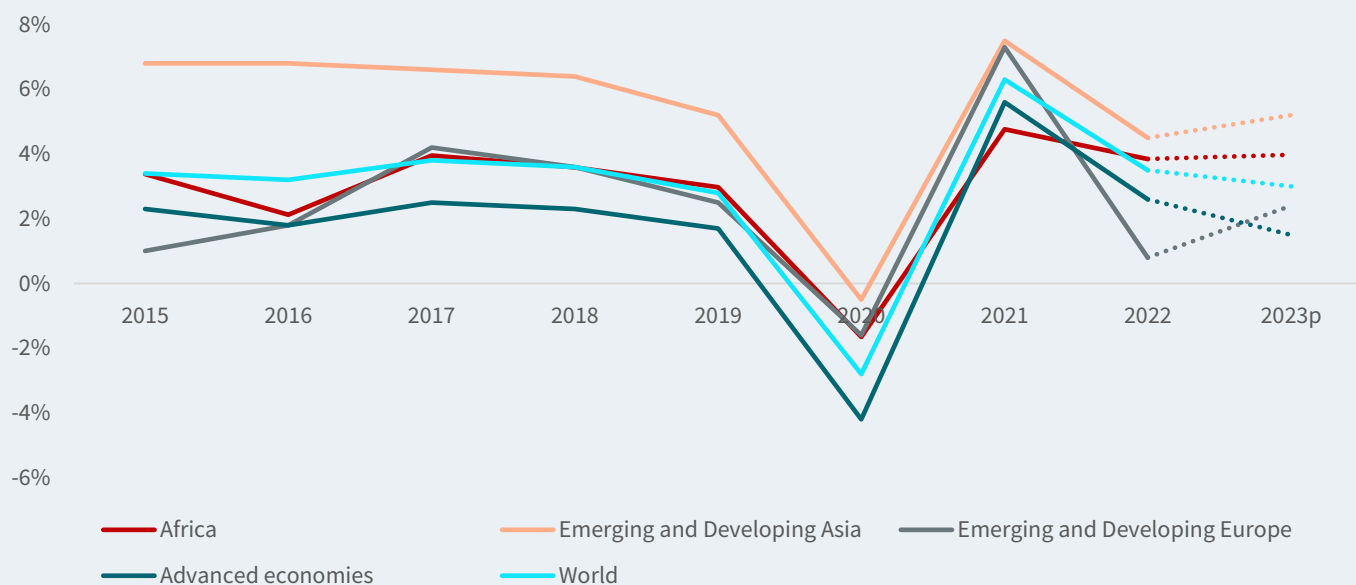


Figure 3: Real GDP growth, 2010-23, in percent. Source: IMF World Economic Outlook (October 2023) and AfDB Socio Economic Database.

²¹ Afreximbank, „African Trade Report: Export Manufacturing and Regional Value Chains in Africa Under a New World Order“ (Cairo: African Export-Import Bank, 2023), accessed 22 November 2023.

²² According to the IMF, exchange rate pressures were at a six-year peak in 2022, on average, and were higher in pegged regimes and non-resource-intensive countries. IMF, „Managing Exchange Rate Pressures in Sub-Saharan Africa—Adapting to New Realities,“ in *Regional Economic Outlook: Sub-Saharan Africa—The Big Funding Squeeze* (Washington, D.C.: International Monetary Fund (IMF), April 2023), accessed 22 November 2023.

²³ African Development Bank (AfDB), *African Economic Outlook 2023: Mobilizing Private Sector Financing for Climate and Green Growth in Africa* (Abidjan: AfDB, 2023), accessed 22 November 2023.

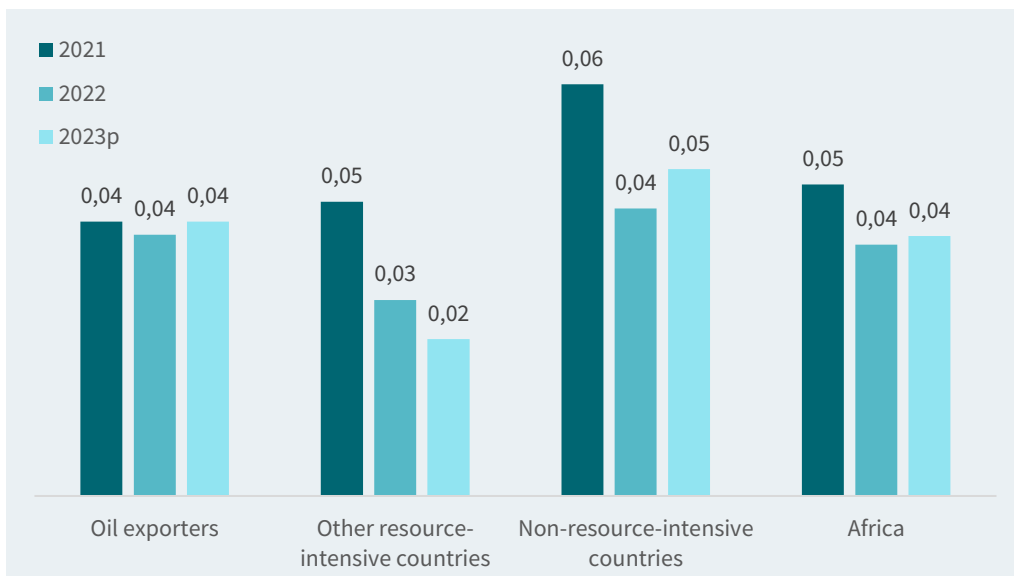


Figure 4: Real GDP growth in Africa, by resource grouping, 2021-23, in percent. Source: AfDB Socio Economic Database.

increased poverty incidence, and exacerbated food insecurity. The rise in the cost of living profoundly affected African households, especially the most vulnerable, pushing 15 million more Africans into extreme poverty. Furthermore, the increase in food prices has deepened food insecurity in Africa, which is already the most food insecure region in the world. According to the FAO, 342 million people (24% of Africa’s total population) are severely food insecure in 2022, an increase of 3.2% between 2021 and 2022.²⁴ To address the socio-economic effects of food and energy inflation, fiscal authorities implemented a wide range of policy measures,²⁵ including spending on cash and in-kind transfers, subsidies for food

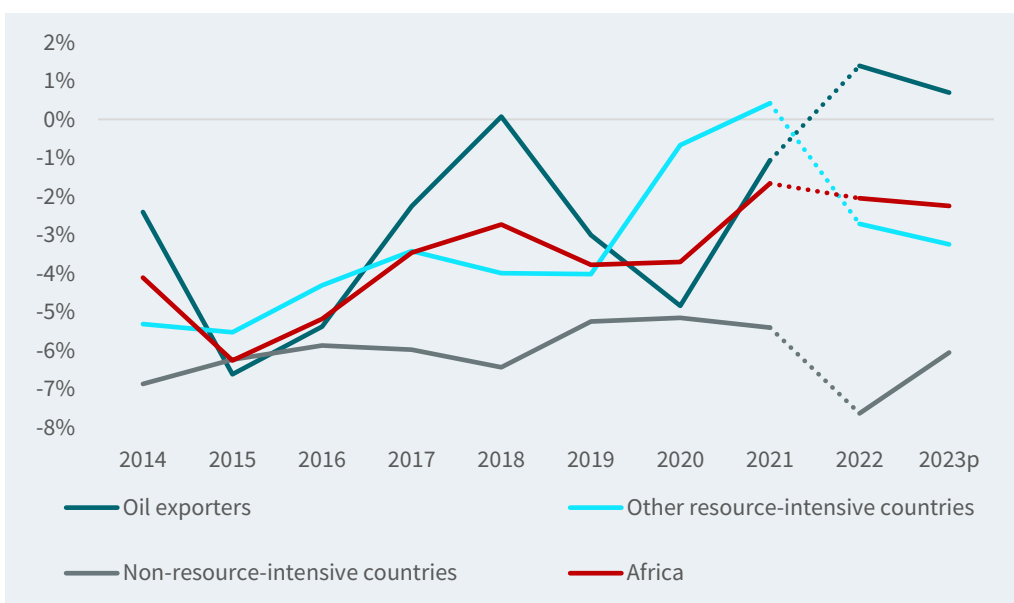


Figure 5: Current account balance by type of resources, 2015-23, in percent of GDP. Source: AfDB Socio Economic Database.

²⁴ FAO, IFAD, UNICEF, WFP, and WHO, The State of Food Security and Nutrition in the World 2023: Urbanization, Agrifood Systems Transformation, and Healthy Diets Across the Rural-Urban Continuum (Rome: Food and Agriculture Organization, 2023), accessed 22 November 2023.

²⁵ Food and Energy Price Action Database, IMF, accessed 05 February 2024.

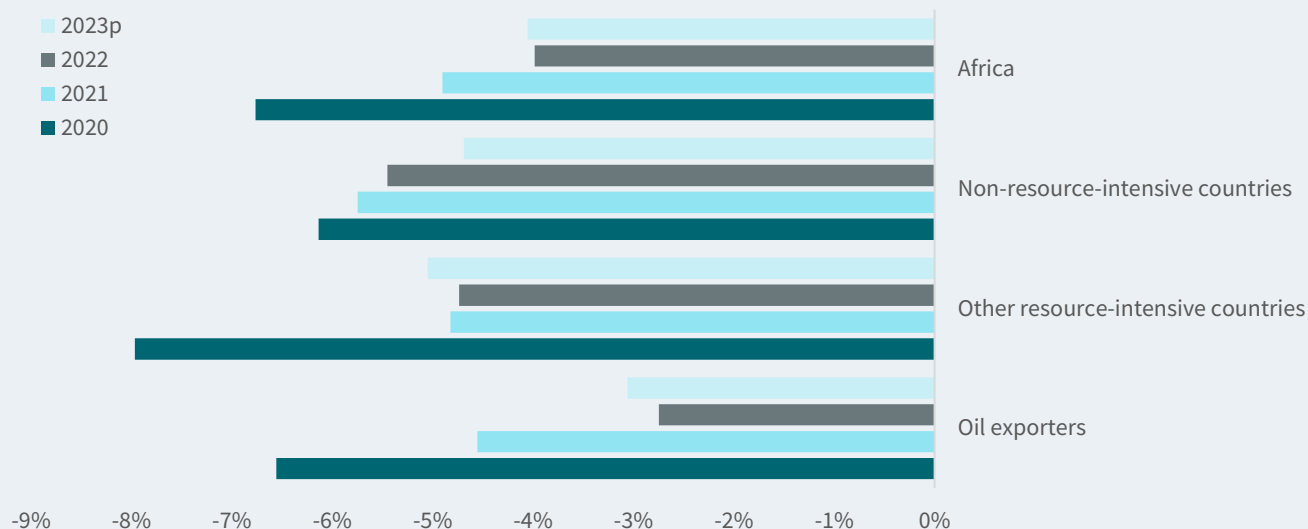
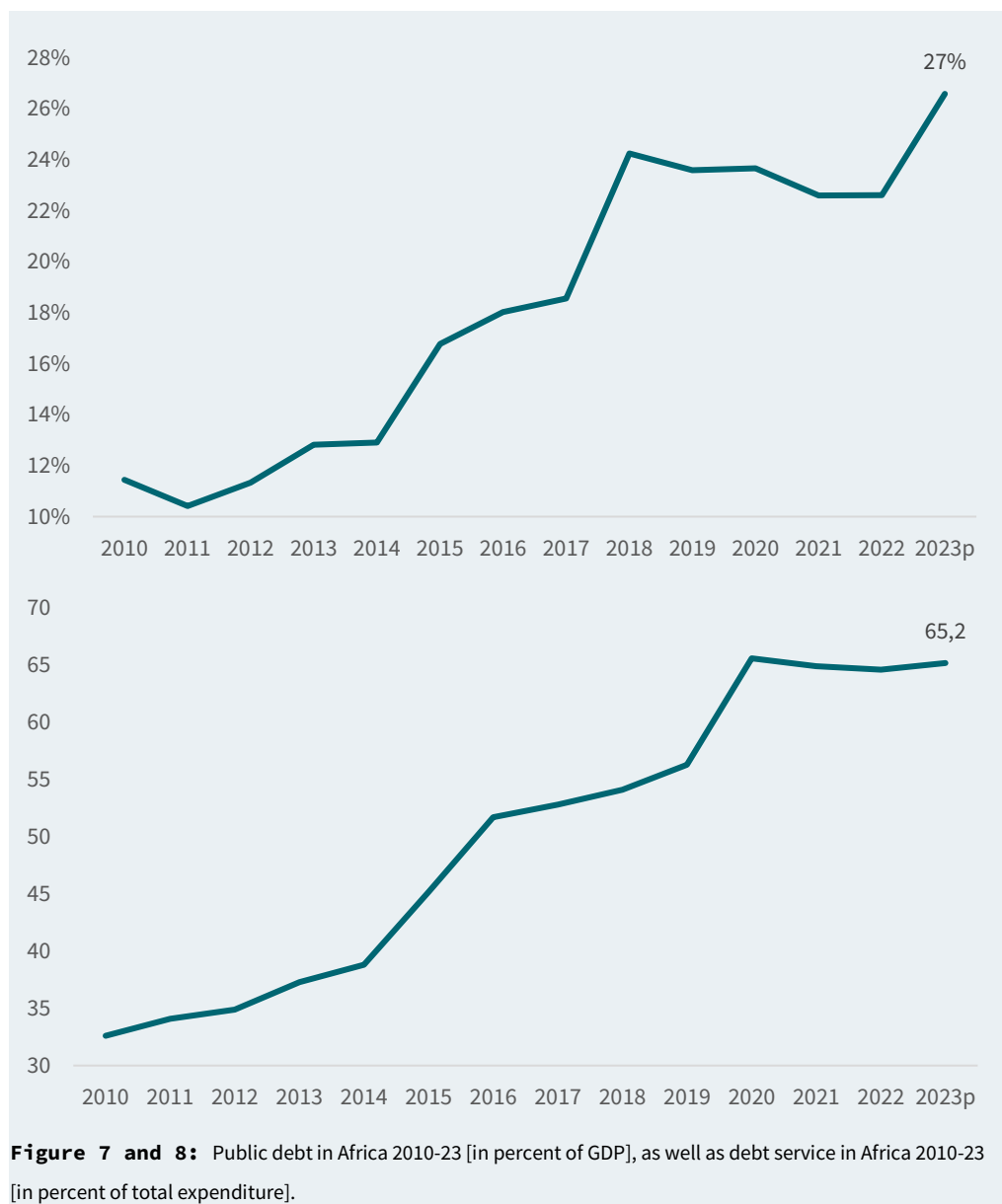


Figure 6: Fiscal balance, by type of resources, 2020-23, in percent of GDP. Source: AfDB Socio Economic Database.

products, fuels, and fertilizers, an increase in the public wage bill, and revenue-related actions such as the reduction or suspension of import tariffs, VAT/sales tax, and corporate and personal income tax. Additionally, non-fiscal measures such as price freezes and export restrictions were put in place. Research has found that targeted support to households through cash transfers do not distort relative prices and proves to be the most cost-effective tool to ease the strain on vulnerable households.²⁶ This spending measure supposes that the country has a higher coverage social safety net. On the African continent, only Djibouti, Madagascar, Mozambique, Senegal, Seychelles, and Tanzania have announced cash transfers targeted to vulnerable households. Measures were mainly focused on responses to higher food products via subsidies, representing 34% of total spending measures. These measures are usually untargeted and put additional pressure on government budgets. On average, the expenditure for newly implemented measures starting from January 2022 to tackle the increase in food and energy prices amounts to 0.9% of GDP.

Despite the gradual improvement in global economic conditions and the projected positive performance of Africa's economy in 2023–24, the economic outlook remains clouded by a multitude of risks. Africa's economic growth is expected to strengthen in 2023 and 2024, buoyed by the probable improvement in external conditions. China's economic reopening and the associated impact on Asia's overall growth could bolster demand for Africa's commodities. The pause in policy-rate hikes in many large economies and some relative easing of international financial conditions have helped reduce sovereign spreads for sub-Saharan African countries, thereby alleviating some of the pressure on funding constraints. Additionally, the recent decline in global inflation offers some respite; however, this trend could quickly reverse if the Russia-Ukraine conflict escalates further or is prolonged. Russia's suspension of its participation in the Black Sea Grain Initiative, brokered by the United Nations and Türkiye, in July 2023 could create more uncertainty in global food markets. Following Russia's withdrawal from this initiative, Ukraine's wheat exports declined by 31% in Sep-

²⁶ David Amaglobeli, Mengfei Gu, Emine Hanedar, Gee Hee Hong, Céline Thévenot, Policy Responses to High Energy and Food Prices, IMF Working Paper 23/74 (International Monetary Fund, 2023), accessed 22 November 2023.



tember-November 2023, compared to the same period of 2022.²⁷ This could eventually affect African importers of wheat from Ukraine (see Figure 1). Moreover, the surprise decision by OPEC+ in early April 2023 to cut oil production by over one million barrels a day could also stoke a rise in oil prices.²⁸ In fact, this supply cut combined with strong oil demand in China, and faster-than expected economic growth in the United State, resulted in a 20% surge in crude oil prices in October 2023 compared to May 2023.²⁹

The destabilizing impact of the Russia-Ukraine conflict on Africa's debt sustainability

The Russia-Ukraine conflict has raised deep concerns about debt sustainability in many African countries. Africa's debt is at its highest level in over a decade since the COVID-19 pandemic. The expansionary fiscal measures adopted by many African countries to support

²⁷ Ministry of Agrarian Policy and Food of Ukraine. Foreign Trade in Agricultural Products, published 23 August 2022, last update on 16 January 2024, accessed 05 February 2024.

²⁸ World Bank, Africa's Pulse: Delivering Growth to People Through Better Jobs, Vol. 28 (Washington, D.C.: World Bank, October, 2023), accessed 22 November 2023.

²⁹ World Bank, Commodity Price Data (The Pink Sheet), 04 December 2023, accessed 05 February 2024.

businesses as well as the most vulnerable segments of the population during the pandemic led to an increase in public debt from an average of 44% during the period 2010–19 to 65.6% in 2020 (Figure 6). Since the recovery in demand and economic activity has improved fiscal revenues and reduced Africa's fiscal deficit in 2021, Africa's debt-to-GDP ratio has slightly fallen to 65%.

However, the Russia-Ukraine conflict has come at a critical time, when several African countries had already limited their fiscal maneuvering margins and exacerbated their debt-related challenges. For instance, according to the World Bank's Africa Pulse,³⁰ over half of Sub-Saharan African countries are in debt distress or at high risk of being in debt distress. In fact, the conflict and resulting global inflation have impacted public finances in African countries in various ways. Firstly, the fiscal measures mentioned above, deployed to mitigate the socioeconomic effects of food and energy inflation, have added additional pressures on public finances. Secondly, African countries are now dealing with higher risk premiums and wider sovereign spreads due to tightening financial conditions resulting from significant interest rate hikes.³¹ This will become even more critical given the need to secure credit for economic recovery and to refinance debt maturing in the coming years (Table 1). Additionally, disruptions in financial markets go beyond an increase in interest rates, intensifying uncertainty and fostering risk aversion. This has led investors to prefer safer assets, particularly US and European sovereign bonds, resulting in the depreciation of national currencies and an increase in the cost of debt service (Figure 7). Moreover, the shift in Africa's debt structure towards commercial creditors and non-members of the Paris Club has made debt management more complex.³² This, combined with limited fiscal space and growing financing needs, has created a vicious cycle of debt overhang.

To avert an unsustainable trajectory, public finance management at the national level and regional and international cooperation would play a crucial role in easing financial constraints and alleviating the burden of debt. At the national level, African economies face critical challenges related to debt management and restructuring. A key approach is to develop responsible fiscal policies that maximize public revenues while controlling expenditures to ensure long-term sustainability. In addition, transparent and strategic negotiations with creditors, including adjustments in the repayment terms, are essential. Moreover, governments need to make informed decisions about the choice between domestic and external markets, carefully weighing the benefits and risks for optimal debt management. At the regional level, African nations should accelerate the joint establishment of the African Financial Stability Mechanism (AFSM). This mechanism aims to assist African countries facing temporary discrepancies in their balance of payments, prevent payment defaults due to illiquidity by providing favorable financing to at-risk countries, and serve as a platform for the orderly restructuring of debt. At the international level, the international community needs to enhance the common debt treatment framework initiated by the G20 and the Paris Club so as to aid low-income countries in debt restructuring and address ongoing challenges related to solvency and liquidity. Additionally, African governments are advocating for the rechanneling of IMF's Special Drawing Rights (SDRs) to Multilateral Development Banks, such as the African Development Bank and the Inter-American Development Bank to provide essential liquidity support to African countries.

³⁰ World Bank, *Africa Pulse* (Washington D.C.: World Bank, 2023), accessed 05 February 2024.

³¹ IMF, *Regional Economic Outlook for Sub-Saharan Africa: Light on the horizon?* (Washington, D.C.: International Monetary Fund (IMF), October 2023), accessed 22 November 2023.

³² "Evolution of Debt Landscape over the past 10 Years in Africa - Keynote Speech by Dr. Akinwumi A. Adesina President, African Development Bank Group Delivered at the Paris Club - June 20, 2023", African Development Fund, 20 June 2023, accessed 22 November 2023.

Countries	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032
Egypt		1.8	3.3	3.0	2.7	3.1	2.6	1.8	2.8	2.9	2.8
South Africa	1.0	1.0	1.5	2.1	1.8	1.0	2.0	2.0	1.4		1.4
Nigeria	0.3	0.3		1.1		1.5	1.3	1.3	1.3	1.0	1.5
Ghana					1.0	2.0		2.0	1.0		1.3
Morocco	1.5	1.5	1.1		0.6	0.8			0.6	1.1	1.0
Angola				0.9			1.8	1.8			1.8
Cote d'Ivoire			0.1	0.3			0.8		1.0	1.0	2.4
Kenya			2.0			0.9	1.0				1.2
Tunisia			1.0	1.0	0.8	0.2					
Zambia	0.8	0.8	1.0			1.3					
Gabon			0.1	0.7						1.8	
Senegal			0.1								
Ethiopia			1.0								
Benin					0.2						0.8
Cameroon				0.2							0.8
Mozambique										0.9	
Namibia				0.8							
Rwanda										0.6	
Rep. of Congo							0.2				

Table 01: Africa's sovereign principal debt maturities, by country, 2022–32 [in USD billion, levels exceeding USD 2 billion in bold]. Source: Moody's Investors Service, *Rollover Risk Increases Amid Tighter Financial Conditions and Upcoming Maturity Wall* (New York City: Moody's Investors Service, 28 June 2022), accessed 22 November 2023.

Embracing opportunities in Africa amidst global fragmentation

The global economic landscape is facing heightened geoeconomic fragmentation, characterized by escalating geopolitical tensions and rising protectionism trends, particularly in the realm of strategic goods like semiconductors and critical minerals. This evolving global environment could have profound implications for the African economy, depending on the severity of these trends. According to the IMF,³³ if the world were to fragment into isolated trading blocs centered around the US/EU or China, sub-Saharan Africa could experience a permanent decline of up to four percent of real GDP over a decade. Additionally, this scenario could impact approximately half of the region's international trade value through higher import prices and the loss of key export markets. These losses could be further exacerbated if capital flows between trade blocs are disrupted due to geopolitical tensions. The region stands to lose an estimated \$10 billion of foreign direct investment (FDI) and official development assistance inflows. However, in a less extreme scenario of strategic decoupling whereby the US/EU cut ties with Russia while sub-Saharan African countries maintain

³³ IMF, "Geoeconomic Fragmentation: Sub-Saharan Africa Caught Between the Fault Lines," in *Regional Economic Outlook: Sub-Saharan Africa—The Big Funding Squeeze* (Washington, D.C.: International Monetary Fund (IMF), April 2023), accessed 22 November 2023.

free trade, trade flows could divert to other regions, creating new partnerships and, potentially, boosting intra-regional trade.

Amidst these challenges, there are also some silver linings for Africa. The continent is emerging as a strategic player in global supply chains, particularly in high-knowledge and technology-intensive industries. Its rich endowment of critical minerals, essential for high-tech industries like automotive, electronics, and renewable energy, presents an opportunity for the continent to play a pivotal role in geographically diversified and resilient supply chains. Africa's vast natural resources, including solar and wind energy, along with essential minerals like platinum group metals, copper, cobalt, tin, bauxite, and manganese, position the continent to play a significant role in the global transition to clean energy solutions. For instance, Africa holds 92% of global Platinum Group Metals (PGM) reserves, 50% of cobalt and 42% of manganese,³⁴ all crucial components for producing batteries and electric vehicles.³⁵ To fully capitalize on these opportunities, Africa's participation in global supply chains must evolve beyond raw material provision and it must enhance its participation in the high value-added segments of these chains. Achieving this transformation requires addressing inherent supply chain vulnerabilities through upgrading infrastructure, promoting formalization, strengthening institutions and regulations, fostering market integration, enhancing access to finance, embracing technological adoption, developing skills in high-tech and knowledge-intensive industries, and mitigating political risks.³⁶ Furthermore, Europe's drive to reduce its reliance on Russian oil and gas and to bolster its long-term energy transition prospects, has spurred exploration of alternative suppliers, particularly African countries. Europe has initiated discussions with Senegal, Nigeria, Tanzania, and Mozambique to explore potential collaborations for expanding production or developing new natural gas projects.³⁷ However, Africa stands at a crossroads, balancing the trade-offs between contributing to Europe's energy demands and meeting its own development priorities and structural energy challenges. A balanced partnership framework, rooted in financial cooperation, technology and skills transfer, and clear guidance on an energy transition roadmap, is essential to foster a mutually beneficial energy relationship between Europe and Africa.

³⁴ Data from U.S. Geological Survey, Mineral Commodity Summaries 2023: Cobalt, Manganese, PGM (Reston, VA: U.S. Geological Survey, 31 January 2023), 61, 115, 135, accessed 22 November 2023.

³⁵ International Energy Agency (IEA), World Energy Outlook Special Report: The Role of Critical Minerals in Clean Energy Transitions (IEA, 2022), accessed 22 November 2023.

³⁶ UNCTAD, Economic Development in Africa Report 2023: The Potential of Africa to Capture Technology-Intensive Global Supply Chains (Geneva: United Nations Conference on Trade and Development, 16 August 2023), accessed 22 November 2023.

³⁷ Rim Berahab, "Shaping A Renewed Atlantic Vision of Energy Security: Old Trends, New Paradigms" Policy Center for the New South, Jean Monnet Atlantic Network (2023), accessed 22 November 2023.

Challenges to Food Security in Africa after the Russian Invasion of Ukraine

Tobias Heidland and Bettina Rudloff

Russia's invasion of Ukraine provoked a shock for global food security that was felt particularly acutely in Africa. It has sharpened awareness of the complexity of food security, which is affected not only by short-term meteorological conditions but also by long-term climate change and the vagaries of geopolitics. As a result, ensuring food supply independence and resilience to shocks have become significant political priorities. This chapter examines the impact of the Russia-Ukraine war on food security in Africa, and policy responses to that impact, with a particular focus on Germany's response.

The war's direct and indirect effects on food security in Africa

Ukraine and Russia play vital roles in the global supply of grains, including wheat, because part of their territory is a very productive agricultural area (the "black earth belt"). During the last few years, the two countries covered on average about 30% of global wheat exports.³⁸ Additionally, Russia is one of the most important fertilizer exporters, accounting for about 14% of world exports in 2022.³⁹ These large market shares result in sizeable price impacts whenever exports from these countries are severely disrupted. These price effects especially hit consumers already paying large amounts of their income on food in macro-economically weak countries that struggle to cover increasing import bills.

The Russian invasion of Ukraine has had *direct effects* on Ukrainian grain production and related exports by military destruction, reduced access to production factors like machinery or fertilizers, and especially disruptions to the relevant storage and export infrastructure, including the critical Black Sea corridor. These have reduced the supplies originating in the larger region around the Black Sea of food, fertilizers, and to some extent energy, which resulted in rising world market prices of agricultural products.

In addition, the war has also had *indirect effects* on food security⁴⁰ worldwide that derive from policy reactions to the war or ensuing market disruptions, including export restrictions that can further push up global prices.⁴¹ After the invasion, Russia and China imposed export restrictions on fertilizer, while Russia and India restricted exports of wheat and rice – two of the most important agricultural commodities, the latter a substitute if wheat is no longer affordable. These policies were informed by worries about domestic supply, including for reasons that were unrelated to the war, such as adverse weather conditions related to climate change in India. By the beginning of 2023, around 30 countries had imposed 50

³⁸ Figure 1. Shares of Russia and Ukraine in global production and exports of selected crops (2016/17-2020/21 Avg.). Source: OECD, The impacts and policy implications of Russia's aggression against Ukraine on agricultural markets (Paris: OECD 5 August 2023), accessed 2 October 2023. The impacts and policy implications of Russia's aggression against Ukraine on agricultural markets (oecd.org).

³⁹ "Fertilizers", The Observatory of Economic Complexity (OEC), 2023, accessed 2 October 2023.

⁴⁰ The FAO defines food security as a condition "when all people, at all times, have physical and economic access to sufficient, safe and nutritious food that meets their dietary needs and food preferences for an active and healthy life". FAO, Rome Declaration on World Food Security and World Food Summit Plan of Action (Rome: FAO, 1996), accessed 13 November 2023.

⁴¹ Joseph W. Glauber, David Laborde Debucquet, eds., The Russia-Ukraine conflict and global food security (Washington, D.C.: International Food Policy Research Institute (IFPRI), 2023).

restricting measures.⁴² A further, widely debated indirect effect is that of Western states' sanctions against Russia. These follow the international consensus that sanctions should not apply directly to humanitarian goods such as food. However, Russia accuses the sanctioning countries of causing hunger. In fact, sanctions can indeed have unintended effects by causing economic uncertainty or prompting private companies to “over-comply” and avoid getting involved in trading food, even though it is exempted from sanctions.⁴³ These indirect effects, even if potentially small, can be exploited politically – in this case by Russia. Combining this blame game with promises of food deliveries, Russia seeks to gain stronger diplomatic and economic links with countries suffering from food shortages.

Initially, the Russian invasion caused global wheat prices to almost double in value. After the so-called “grain deal” was concluded to enable transport via the Black Sea again, prices fell to approximately pre-war levels. However, with new developments in the war, such as the destruction of key infrastructure in Ukraine, prices do fluctuate considerably. For consumers in poorer countries, it is also important to note that the pre-war levels were the result of substantial increases over recent years, exacerbating hunger globally even before the Ukraine war.

African heterogeneity in food security impacts

The war's effects have added to an already bad situation prior to the war. The World Food Programme (WFP) indicates that 258 million people in 58 countries and territories were facing so-called acute food insecurity at crisis level or worse in 2022, up from 193 million people in 53 countries and territories in 2021.⁴⁴

How the direct and indirect pathways outlined above eventually affect national and local food prices and food security differs across countries. In addition to the direct effect of the war-related price shock, a country's particular vulnerability to price increases matters too. That vulnerability depends on the existing nutritional situation, the financial capacity to pay increased import prices, and compensation mechanisms such as using stockpiles or switching to other products like rice instead of wheat. Within countries, effects also vary: urban populations and landless workers in the countryside often face greater difficulties than food producers.

Egypt and Nigeria, for example, reveal different approaches in their reactions to the war-induced risks and food insecurity more generally, since they differ in trade openness and aid to consumers.

Egypt is among the continent's wealthier countries. Nevertheless, it turned out to be highly vulnerable to the disruption of grain imports from Ukraine and Russia. The 2022 Global Food Security Index⁴⁵ ranked the country 77th out of 113 countries. In the MENA region, only war-torn Syria and Yemen ranked lower. In recent years, due to a growing population, restricted agricultural areas, and an inefficient agricultural system, Egypt has

⁴² Joseph Glauber, David Laborde, and Abdullah Mamun, “From Bad to Worse: How Russia-Ukraine War-Related Export Restrictions Exacerbate Global Food Insecurity,” IFPRI Blog (blog), 13 April 2022, accessed 10 May 2023.

⁴³ “Over-compliance with unilateral sanctions a direct threat to peoples' health and well-being: UN expert,” OHCHR press release, OHCHR, 15 September 2023, accessed 13 November 2023.

⁴⁴ World Food Programme (WFP), Global report on food crises: Number of people facing acute food insecurity rose to 258 million in 58 countries in 2022 (Rome: WFP, May 3, 2023), accessed 2 October 2023.

⁴⁵ The Index is constructed from 68 indicators and is designed to be a dynamic quantitative and qualitative benchmarking mode; see “Global Food Security Index 2022. The GFSI website navigation guide,” The Economist, 2022, accessed 13 November 2023.

become the world's top wheat importer.⁴⁶ It is remarkably dependent, especially on Russia and Ukraine, and sources roughly 60% and 20% of its imports from each respectively.⁴⁷ The government heavily subsidizes bread prices, which are estimated to benefit well over half of its 105 million inhabitants, and intervenes in the farming sector, which can create disincentives for producers. In response to the crisis, the government tried to buy more Egyptian wheat from local farmers at high prices and used mandatory sales requirements per hectare. However, the results fell well short of the targeted amount of harvest and were criticized for indirectly discouraging the planting of marginally productive land. Egypt also tried to diversify its grain sources with imports from France, which had historically been limited due to Egyptian import requirements of only buying certain quality classes. Efforts to diversify through increased intraregional trade are difficult since Egypt and other North African countries belong to the region with the lowest intraregional trade when compared globally – despite the Agadir Trade Agreement, whose implementation has remained weak. Vis-à-vis the EU, several measures on both sides continue to hinder trade, especially of agricultural products.

Nigeria ranks below Egypt, at 107th according to the Global Food Security Index. Estimates of what percentage of the population is hungry range from 23% to 40%.⁴⁸ In the period following the COVID-19 pandemic and the Russian invasion of Ukraine, the bread price stayed stable, but the overall consumer price index rose by 23% in 2023.⁴⁹ The country declared a food security emergency in mid-2023 to support government actions, leading to food distribution to 9 million households out of the national strategic reserve.⁵⁰ Moreover, Nigeria has long sought to increase food self-sufficiency since nearly 100% of national wheat demand was imported in recent years, mainly from the US, Canada, and Russia.⁵¹ As a large rice producer, Nigeria can partially rely on rice instead of wheat for sustenance, but it faces overall rice deficits.⁵² Initiatives such as the “Wheat Strategy”⁵³ and the “Fertilizer Initiative”⁵⁴ are being implemented to boost domestic production. Finally, Nigeria envisages increasing regional trade to diversify sources and balance regional production risks. The Economic Community of West African States (ECOWAS) could help Nigeria increase intra-regional trade. However, as regards trade with the EU, Nigeria is the only country that has not yet signed the EU's Economic Partnership Agreement with West Africa.

Areas for action at different levels in the mid and long term

In addition to the policy reaction to immediate needs, such as food aid and refraining from export restrictions, longer-term actions are important. Some of these have already been initiated or strengthened in reaction to the war-induced risks.

⁴⁶ FAO, Food Outlook: Biannual Report Report on Global Food Markets. June 2023 (Rome: FAO, 2023), accessed 13 November 2023.

⁴⁷ US Department of Agriculture, Decline in Ukraine Wheat Imports Drives Egypt to Diversify its Suppliers, (Cairo: USDA, Jun 22, 2022), accessed 13 November 2023.

⁴⁸ Olayinka Kareem (forthcoming), “The case of Nigeria”, in Geo-strategic aspects of food trade and food security in the light of recent global economic tensions – policy choices in country cases, IATRC commissioned paper, ed Bettina Rudloff, Christine Wieck, and Kristina Mensah.

⁴⁹ Nicholas Minot and Will Martin, Poverty Impacts of Food Price Increases in Nigeria (Washington, D.C.: IFPRI, 2023), accessed 13 November 2023.

⁵⁰ Olayinka Kareem (forthcoming), “The case of Nigeria”.

⁵¹ Shem Oirere, “Nigeria seeking grain self-sufficiency,” WORLD-GRAIN.com, Aug 4, 2019, accessed 13 November 2023.

⁵² Ibid.

⁵³ Okwe Obi, “FG validates nat'l wheat policy document,” The Sun, 30 August 2022, accessed 13 November 2023.

⁵⁴ “NSIA Implements Restructuring of the Presidential Fertilizer Initiative (PFI)”, NSIA press release, NSIA, 27 April 2021, accessed 13 November 2023.

Africa

In the short and mid-term, countries should diversify imports and strengthen regional cooperation, since this can serve as “risk insurance” against any acute shocks that only hit a subset of countries. In this respect, Northern African countries seem particularly weakly positioned thus far, although the African Continental Free Trade Area (AfCFTA) may help to overcome this in the long term because it will encompass this weakly integrated region. Regional emergency stocks are another instrument that is already being promoted by African Risk Capacity, a specialized African Union agency tasked with coordinating capacities to plan, prepare, and respond to extreme weather events and natural disasters.⁵⁵ In the long term, African countries should act following their self-set priorities and probably emphasize agriculture more than they have previously, given the continuous experience of being hit hard by developments outside the continent. In the 2003 Maputo declaration,⁵⁶ African countries set themselves the target of allocating 10% of public expenditures on agriculture development. That has barely been reached, indicating that agriculture is a generally limited political priority compared to other policy goals, despite agriculture’s great importance for employment and output. Most importantly, during the coming decades, agriculture must become climate resilient, which may involve choosing and designing optimal seeds from vulnerable high-yield varieties, locally adjusted seeds, and genetically enhanced varieties. Other key long-term challenges are job creation for young people in a better-integrated and more productive agricultural sector, while also considering pathways to the future for the vast number of small subsistence farms. Since population and income growth is expected to raise African meat demand by 30% by 2050, the trade-off between husbandry and climate impacts (through water and feed) must be considered.

Germany

Short and mid-term policy responses gained high priority under the German G7 presidency, which coincided with the Russian invasion. Results included strengthening mechanisms to monitor international markets by integrating fertilizer prices into the existing Agricultural Market Information System (AMIS) and calling on its members as well as the wider global community to refrain from export restrictions. Additionally, as suggested so far only partially by the German National Security Strategy, the unintended effects of sanctions should be better monitored. The latter is important because players such as Russia misuse the effects of sanctions to political ends by blaming Western countries. To avoid this, sanctions should be adjusted or mitigated, for example, by financing food aid. This could be considered and coordinated within the EU. In the longer term, Germany should enhance policy coherence. Recent German policy approaches to food security in Africa have been fragmented across different ministries. For example, the development ministry defined the “transformation of agricultural and food systems” as a priority.⁵⁷ The agricultural ministry has parallel activities, such as aiming for bilateral partnerships with Germany⁵⁸ and hosting the annual platform for international agricultural ministers at the Global Food Forum for

⁵⁵ African Risk Capacity, accessed 2 October 2023.

⁵⁶ New Partnership for Africa’s Development (NEPAD), Comprehensive Agriculture Development Programme, 2003, accessed 13 November 2023.

⁵⁷ Federal Ministry for Economic Cooperation and Development, Transformation of Agricultural and Food Systems. Special Initiative, 2023, accessed 2 October 2023.

⁵⁸ Federal Ministry of Food and Agriculture, Assuring Food Security – Promoting Growth. The BMEL’s commitment to a modern, sustainable agri-food and forestry sector in Africa, 2020, accessed 2 October 2023.

Food and Agriculture. Overall, the German government should actively support African initiatives and avoid pursuing initiatives⁵⁹ that might duplicate efforts or distract from African priorities.

The EU

As a short to mid-term approach, the EU must support Ukraine's economy and agriculture to help the country persevere and recover, to ensure this agricultural powerhouse remains capable of producing large volumes of agricultural products for export. It should also continue to support trade through the so-called "solidarity lanes" as an alternative to the collapsed grain deal. Moreover, the EU should support African climate resilience approaches. In the longer term, the continental initiative of the AfCFTA should be supported. To this end, the EU and African partners could use the EU's regional Economic Partnership Agreements (EPAs). In order to support a free trade agreement that will eventually be on a continental scale, the varying rules embedded in the different regional EPAs should be harmonized. The EU should furthermore insist on globally relevant trade rules, such as avoiding export restrictions, at the multilateral level (WTO).⁶⁰ This would also require the EU and member states to abstain from bans on Ukrainian agricultural imports. Finally, the EU's Global Gateway could contribute to improving the infrastructure necessary for trade in agricultural products.⁶¹

⁵⁹ This focus on African priorities was signaled, for example, at the Africa Climate Summit in Nairobi in 2023.

⁶⁰ Chad P. Bown, "The Challenge of Export Controls". Finance and Development, June 2023, accessed 2 October 2023.

⁶¹ Bettina Rudloff, "Offener Handel, bessere Versorgung". Internationale Politik, 24 April 2023, accessed 2 October 2023.

Consequences of the War for German Policies Towards Africa

Reassessing German Foreign and Security Policy in Africa: The *Zeitenwende* as a Catalyst

Denis Tull

How has the return of war in Europe and the government's clarion call of *Zeitenwende* impacted Germany's foreign and security policy towards Africa? While it was certainly plausible to expect that the sharp refocusing on Europe would go hand in hand with declining attention towards the African continent, the opposite proved to be the case, at least in the short term. The multi-faceted repercussions of the sea change in Europe have had the political effect of Berlin strategically upgrading Africa, although this followed a longer-term trend of greater engagement with the continent over at least the past decade.

War in Europe: Reassessing Africa Policy

In the wake of Russia's fully-fledged invasion of Ukraine in February 2022 and Europe's and NATO's resolute and sustained support for Ukraine ever since, it was plausible that Germany would be tempted to single-mindedly centre all of its attention on Europe, to the detriment of other regions, including Africa. This was particularly likely in the case of security and defence policy, given the renewed focus on territorial and allied defence. However, it has become clear since then that Germany did not take Africa into consideration as an afterthought. Rather Africa proved to be an area where the *Zeitenwende*'s political and economic repercussions would need to be addressed in one way or another.⁶² For Germany, the implications of Russia's war on Ukraine are far-reaching, and concern an extraordinarily wide set of areas (energy security, defence reform, economic dependencies and resilience, alliance politics, multilateral institutions), touching both domestic and foreign and security policy at large. Germany's national security strategy (2023), with its "integrated" security concept, reflects this⁶³

Therefore, the multi-layered nature of the *Zeitenwende* had an obvious African dimension. Almost immediately this became apparent with regard to the diplomatic positioning of African states in the UN General Assembly. In Berlin, Africa's divided response to the Russian aggression – repeated in successive rounds of voting in various fora – caused a combination of surprise, consternation and even disappointment. In response, the German government embarked on sustained efforts to convince reticent African governments that Russia's aggression against Ukraine was not a European or NATO problem, but a global

⁶² Olaf Scholz, "The Global *Zeitenwende*: How to Avoid a New Cold War in a Multipolar Era," *Foreign Affairs*, Dec 5, 2022, accessed 22 November 2023.

⁶³ The Federal Government, National Security Strategy Robust. Resilient. Sustainable. Integrated Security for Germany, Berlin 2023 (accessed 22 November 2023).

challenge- with mixed results, at best.⁶⁴ Another immediate Africa-related ramification of the war was Germany's frantic search for new energy supplies. To drastically cut dependence on Russian gas imports, Berlin set its eyes on Africa (for example, Senegal, Namibia and Angola). This move raised a host of new questions and contradictions regarding Germany's climate policy, both at home and abroad.

In sum, Russia's war on Ukraine has been understood as a game changer for German and European security in the broadest sense, which will necessarily affect Germany's foreign policy writ large, including relations with Africa. Amidst the collapse of long-held German beliefs about an essentially benign international environment, Africa emerged as a region where the repercussions of the *Zeitenwende* would also play out, both with respect to economic necessities (the diversification of energy sources and other supply chains), but also risks (such as the multilateral order and institutions).

If Russia's war on Ukraine has changed German perceptions of Africa, this change was further encouraged by Moscow's increasing activism in Africa itself. In the Sahel in particular, Russia's inroads gained momentum in parallel with the Ukraine invasion.⁶⁵ Inevitably, this attracted significant attention in Germany and Europe, where Europeans have been considerably involved in stabilization and peacekeeping since 2013. Growing Russian influence in Mali, then in Burkina Faso, added to the perception of risks and threats emanating from Russia, this time on Europe's and NATO's southern flank.

There is no before and after in Germany's relations with Africa. What has changed, at least in the short term, is how policy-makers in Berlin look at Africa. In private conversations, government officials stress that building stronger relations with African countries has not become less, but rather more important. If the number and frequency of diplomatic visits is an indicator of (attributed) political standing, then the sharp rise of (over 50) visits by German ministers and senior officials to African countries since February 2022 suggests that the continent has incurred a net gain in strategic importance. Chancellor Scholz himself has travelled three times to Africa during this period. This presents a significant contrast to previous administrations, when visits to Africa were infrequent. The government's decision to update its relatively recent Africa policy guidelines (of 2019) may be read as another sign in this respect.

A Long-Term Trend of Greater Engagement

Nevertheless, this increasing interest in Africa does not come out of the blue, but follows a hesitant though long-term trend towards a greater awareness in most parts of government that Germany needs to expand and intensify its engagement with the continent. This first gained traction during the early 2000s, when the European Union, within the framework of its Common Security and Defence Policy (CSDP), engaged in multiple missions and operations in Africa, sometimes with German contributions. A more significant leap forward was taken in the following decade, when Chancellor Merkel, against the background of the 2015 refugee crisis, encouraged her government towards greater involvement in Africa, including pledges for more aid and increased private investment, including under its G20 presidency, but also a greater security footprint.⁶⁶ This was notably the case in the Sahel where as well

⁶⁴ Priyal Singh, "Zeiten-What-Now? Why Germany's Idea of Epochal Change Fails to Resonate Across Africa," *Blog Joint Futures* (blog), 03, 25 September 2023, accessed 22 November 2023.

⁶⁵ The first Wagner troops arrived in Mali in December 2021.

⁶⁶ Denis M. Tull, *French-German Cooperation in the Sahel: Consequences of and Perspectives for Germany's "Turn to Africa"*, Research Paper N°45 (Paris: IRSEM, 2017).

as its sizeable contribution to EU and UN missions in Mali (peaking at over 1,500 soldiers in 2022), Berlin significantly expanded its bilateral security force assistance programmes.

Therefore, post-*Zeitenwende* interest in Africa is not new, but the repercussions of the Ukraine war has ensured that engagement with the continent has a new sense of urgency. While previous discourse was vague on German interests in Africa – except for containing migration – the comprehensive repercussions of the war changed perceptions drastically, especially because some decision-makers woke up to the fact that a substantial number of African governments refused to align behind German/European/Western positions on the matter.

Overall, however, post-*Zeitenwende* Germany looks at Africa through the prism of a progressively uncertain and problematic international environment, marked by political tensions with resurgent or emerging autocratic states. Germany's increasingly sceptical views as regards China illustrate the point. Therefore, German Africa policy in the *Zeitenwende* era takes the prevailing multipolarity in Africa as its starting point. This is not to say that the activism of other, non-Western powers has been ignored, but the hitherto sharply competitive framing has been largely absent – partly because the international environment was considered more benign, and partly because of German uncertainty about its own interests in Africa.

How Should Germany Amend its Africa Policy?

Multipolarity in Africa has become an axiomatic truth. For Germany (and Europe) this means acknowledging that they are only one player among many, with limited political and economic clout and conceding that African states' room for manoeuvre has drastically grown in an age of choice. It has become conventional wisdom that the days when Europeans could exploit the asymmetrical nature of their relations with aid-dependent African countries to impose their will are over.

Consequently, it is not surprising that some officials frame Africa as a “marketplace”, where African states can pick and choose from among outside competitors.⁶⁷ Greater realism and modesty is of course a welcome development. On a rhetorical level it has translated into German (and European) pledges to better “listen” to African partners and to take their views and interests more seriously.⁶⁸ If actually and consistently applied, this could go a long way towards strengthening political credibility. The question remains, though, what Germany wants from Africa (and vice versa), and what Germany has to offer in a competitive marketplace.

Defining German interests should be a first step. It is a prerequisite for a more strategic relationship with certain African states and regions, aligning actions and resources to achieve priority goals. Only when these interests and goals are defined could the next step follow, that is, choosing appropriate partners. Doing so is essential to move out of autopilot mode and the tendency to scatter a wide range of instruments and resources ineffectively in the pursuit of vaguely defined goals. The 2019 edition of the Africa policy guidelines is a case in point. With the notable exception of limiting irregular migration, the government denies interests, hiding behind non-committal phrases such as “to contribute to political

⁶⁷ Josep Borrel, “The Global Gateway, a Brand to Boost European Action Worldwide,” (Brussels: European External Action Service (EEAS), 15 December 2022), accessed 9 February 2023.

⁶⁸ See Federal Ministry for Economic Cooperation and Development (BMZ), Shaping the future with Africa. The Africa Strategy of the BMZ, Berlin, 2023, accessed 22 November 2023.

stability and to reduce development and prosperity gaps” between Africa and Europe.⁶⁹ However, defining interests is a matter of political credibility and transparency. African interlocutors do expect Germany to have interests. Understanding what these are is a prerequisite to engaging in serious conversations about how and where respective goals may diverge or converge. By contrast, feigning altruism does not send the message that Germany takes African countries seriously.

What might these interests be? Simply wanting to outdo strategic opponents would be counter-productive and reduce African partners – implausibly – to figures on a chess-board.⁷⁰ In light of the Ukraine war, for example, the German and European infatuation with Russia’s role in Africa may be understandable. From an African point of view, however, it is a mark of disrespect, suggesting that vying for closer ties with Africa is a function of countering Russian influence.

Instead, global challenges that are de facto of mutual concern are a place to start (including climate change, the reform of international organisations, a rules-based international order). Other strong contenders may be assisting African partners in building effective institutions and the rule of law, curbing migration and political violence, gaining access to markets and supply chains. Whatever the case may be, it should be emphasised that interests are not fixed or objectively given. They are politically defined by political parties, governments and groups in society, according to enduring or changing contexts.

Outlook

Strategic interests mean setting priorities. It may be painful to prioritize some goals over others and Germany’s “Ressortprinzip” (the autonomy of government departments) does not make the task easier. Even if Africa has undoubtedly gained in strategic importance for Germany, other issues compete with or remain more important: war and peace in Europe and the Middle East, the state of the European Union, NATO, China etc.

The obvious challenge is that the continent may be too big to identify a valid and persuasive set of interests that holds steady across five subregions or a majority of 54 countries. Nevertheless, aiming for overarching priorities is worth the effort so as to entrench strategic considerations at the expense of being on autopilot. This does not preclude the possibility that some priorities may be more relevant for certain sub-regions or countries than for others. Finally, strategic goals imply a long-term view and the ability to stay the course. Risks and reversals, as was recently the case in the Sahel, call for adaptation and learning, not for retreat in the face of setbacks.

Arguably, Germany is not badly positioned to improve and intensify its relations with the African continent. It has a large and multi-faceted presence, as well as numerous instruments. It also enjoys a relatively good reputation (unlike France), because it is not known for playing power games, and because of decades of economic development assistance. The latter, however, is no longer a priority for African partners. Germany should begin by clarifying for itself its own strategic priorities on the continent, an indispensable task before rethinking what it has to offer African partners. Aiming to beat strategic rivals should not be one of the priorities.

Security and defence policy could be one area in which Berlin may be able to provide a modest, but nonetheless substantial offer on both bilateral and multilateral levels. This

⁶⁹ Federal Foreign Office, *An Enhanced Partnership with Africa*, Berlin, 2019, 2, accessed 22 November 2023.

⁷⁰ Fonteh Akum and Denis M Tull, “Strategic Competition and Cooperation in Africa,” Policy Brief 13, *Megatrends Afrika* (Berlin: 17 February 2023), accessed 22 November 2023.

does not necessarily imply the deployment of troops akin to the case of Mali (EUTM, Minusma) until recently. In fact, similar missions – whether EU or UN – seem rather unlikely for the foreseeable future due to past ineffectiveness, increasing polarization inside the Security Council as far as the UN is concerned, and scarce demand for such missions in Africa.

However, there is every chance of a sustained African demand for security cooperation, due to pervasive armed conflict and violence in many countries, particularly in West Africa. The substance and thrust of this cooperation will need to align behind local priorities and preferences; in other words, strong local demand and leadership should determine the extent of German support in the realm of capabilities, capacity-building and reform. In that sense, security and defence cooperation with Niger was appropriate, despite the setback. But insisting on local demand and leadership does not solve the kind of problems that have emerged following the coups in Mali and Niger, where unconstitutional politics, exacerbated by geopolitical competition, impose seemingly stark dilemmas. Not all of them can be straightened out, but decision-makers have to ask themselves if retreat will lead to better results than trying to stay engaged. The case of Mali may suggest otherwise. In the end, it comes down to the question of whether some degree of security cooperation can be a political lever or whether political steps towards a return to constitutional order are a prerequisite for Germany to resume security cooperation. Making this a principled position may not provide a way of overcoming the dilemma. A sober contextual analysis on a case-by-case basis may provide better guidance.

In any case, these problems are inherent when engaging in fragile contexts. They are not in any way linked to the war in Europe. The *Zeitenwende* strains security and defence capacities, but the tools and assets for security cooperation in Africa may be quite different from those employed for territorial or allied defence in Europe. Therefore, questions of “how” seem to be more pertinent than questions of “if”, considering that conflict prevention and stabilization rely on integrated concepts that may be theoretically sound, but which have provided – more often than not – disappointing results in terms of impact and effectiveness. How diplomacy, aid, stabilization instruments and civilian tools in support of governance (justice, conflict resolution, administration) best intersect with military and security tools to prevent conflict or promote peace and stability remains a daunting question. In other words, conceiving effective security cooperation requires more than hard thinking on the part of the Ministry of Defence or the Ministry of the Interior. It necessitates a concerted effort across departments to determine strategic objectives and a stringent effort to channel instruments towards these goals, based on a plausible theory of change.

Policy-makers in Berlin habitually say that Germany already “does a lot”, but the focus on quantitative metrics means that German efforts are often not greater than the sum of their parts. More stringent efforts to learn from past experiences, including failures, are necessary to achieve bigger impact and to provide credible security cooperation offers that are valued by African partners. Likewise, paying greater attention to regional dynamics and approaches is necessary. The overwhelming evidence of closely interconnected or even networked conflicts in Africa (North, West, the Horn) has not yet triggered meaningful responses. Consequently, analysing and addressing the perplexing weakness of the African Union, along with its complicated relationships with sub-regional organisations, should be a priority.

German Development Policy in Africa – Continuities and Ruptures after the Russian Aggression against Ukraine

Stephan Klingebiel

As a result of Russian aggression against Ukraine since February 2022, an overarching trend in German development policy in Africa has greatly accelerated: Geopolitical and geo-economic issues have become much more prominent. This applies to the context of development policy, which is now heavily dominated by geopolitical issues: socio-economic problems in partner countries are exacerbated by the global economic consequences of the war. It also applies to the question of how development policy itself can contribute to shaping this context and reduce negative implications of the aggression. Can development cooperation be used to make partner countries more resilient in the area of food security and thus reduce dependence on Russia? How can development cooperation help in countering misinformation in African partner countries? German development cooperation creates regular opportunities to discuss the Russian aggression against Ukraine with partner countries as well as with African regional and continental institutions. Partners in Africa often emphasize their sovereignty to align with multiple external actors, including Russia. These recent trends apply not only to German, but also to European development policy, the approaches of other bilateral European actors and, more broadly, to the activities of non-European Organisation for Economic Co-operation and Development (OECD) countries.

Russia's aggression - effects on development policy trends

Russia's aggression against Ukraine has reinforced, but also changed some trends in development policy towards African partners. For Germany, this can be summarized as follows. First, actors from the Global South, in particular African countries, have become even more sought-after partners since the Russian invasion.⁷¹ This can be seen, for example, in German diplomatic efforts to influence voting in the United Nation (UN) General Assembly, but also in outreach activities within the framework of the G-7 and G-20. German development policy has not changed the allocation of funds to African partner countries based on their positioning towards the Ukraine war. Nor has this prompted Germany to suspend cooperation relationships or to let them expire. Germany is no exception – other OECD countries follow a similar approach. Against this background, German development policy is likely to continue maintaining cooperative relationships with many African partners. Active development cooperation relationships often make it possible to discuss sensitive issues, such as the Ukraine war, in the first place. Consequently, the vast majority of African countries continue to be partner countries of German development policy (with the exception of Eritrea, Gabon, Angola and a few others).⁷²

⁷¹ German Institute of Development and Sustainability (IDOS), “Engaging with partners in the Global South in uncertain times,” IDOS Policy Brief, May, 2022, accessed 5 December 2023.

⁷² Federal Ministry for Economic Cooperation and Development (BMZ), “Shaping the future with Africa: The Africa strategy of the BMZ,” January 2023, accessed 5 December 2023.

Second, the Russian aggression in Ukraine has been and continues to be a topic of discussion between the German government, including the Federal Ministry for Economic Cooperation and Development (BMZ) and partner countries or organisations, such as the African Union (AU) and regional organisations. This primarily involves explaining the German position, but also identifying where perceptions and positions on Russia's aggression converge and where they diverge. Such discussions occur, not least during government negotiations and consultations that the BMZ conducts with partners and which usually result in protocol documents. These exchanges on the assessment of the Russian invasion were and are sometimes characterized by controversy between the negotiating parties.

Third, the consequences of the Russian war are likely to lead to a significant increase in development resources for Ukraine, which is considered a developing country by the OECD Development Co-operation Committee, as well as for other neighbouring countries that are directly affected, especially Moldova.

Germany provided USD 35.3 billion in official development assistance (ODA) worldwide in 2022, making it the second-largest donor within the OECD after the United States (US). The funds allocated to Ukraine for humanitarian aid and reconstruction as well as the funds for the accommodation of refugees in Germany that can be counted as ODA (so-called "in-donor refugee costs") are enormous. Funds particularly for reconstruction are likely to remain high for years to come. In 2022, European Union (EU) institutions spent 38.4 per cent of their ODA on Ukraine, compared to 1.5 per cent for Germany.⁷³ In the same year, the German share in overall ODA for Ukraine, including in-donor refugee costs, totalled 12.8 per cent. A considerable proportion of this was likely spent on refugees from Ukraine.

Up until 2023, the BMZ's budget kept increasing for many years. There had therefore been little controversial debate on funding priorities for different regions of the world, including Africa. The 2024 budget will involve absolute funding cuts. The relative share of bilateral commitments of just over 50 per cent for African partners is expected to remain stable. The federal government's medium-term financial planning indicates that the budget funds for the BMZ will initially be reduced by 5.3 per cent in 2024 compared to the previous year, and then further decline in subsequent years.⁷⁴ The cuts to humanitarian aid, which is the responsibility of the Federal Foreign Office, are even more significant.⁷⁵ This could have an impact on the availability of ODA for the African continent. It cannot be ruled out that the current volume and relative share of ODA for African partners could come under pressure within a short period of time.

Fourth, the effects of the war have also caused food and energy prices on the African continent to rise noticeably (see the article by Heidland and Rudloff in this volume). The severe socio-economic consequences in many African countries,⁷⁶ not least due to Russia's refusal to extend the grain agreement in the summer of 2023, are being addressed by German development cooperation programmes and humanitarian aid. For example, the Federal Foreign Office promised the countries bordering Lake Chad additional humanitarian aid in January 2023, explicitly referring to food insecurity due to the Russian invasion.⁷⁷

⁷³ Organisation for Economic Co-operation and Development (OCED), "ODA levels in 2022 – preliminary data," *Detailed summary note*, 12 April 12, accessed 5 December 2023.

⁷⁴ Deutscher Bundestag, "Finanzplan des Bundes 2022 bis 2026," *Unterrichtung durch die Bundesregierung, Drucksache 20/3101*, 8 May 2022, accessed 5 December 2023.

⁷⁵ Verband Entwicklungspolitik und humanitäre Hilfe (VENRO), "Bundeshaushaltsentwurf 2024," *Analysis*, 2023, accessed 5 December 2023.

⁷⁶ The Russian-African summit held in St. Petersburg in July 2023, had only little success for Russia. It shows that Russia can only make limited relevant economic offers (such as investments) that are, in part, linked to promises related to subsidised food supplies. See, for example: Alex Vines and Tighisti Amare, "Russia-Africa summit fails to deliver concrete results," *Chatham House*, August 2 2023, accessed 5 December 2023.

⁷⁷ Auswärtiges Amt, "In der Region, mit der Region: Tschadsee-Konferenz in Niamay," 25 January 2023, accessed 5 December 2023.

As a result of the Russian aggression in Ukraine, the BMZ is also focussing more on food security in its cooperation with African partners as well as on the greater overall security of the continent's supply chains, such as by promoting renewable energies. In this respect, the Russian aggression has a clear influence on German development policy and humanitarian aid when it comes to sectoral allocation decisions.

Fifth, the increased instability in the Sahel region, the coups d'état in Niger, Mali, Burkina Faso and Gabon, and Russia's involvement in the region, including via the Wagner Group, have affected Germany's entire engagement in Africa, particularly in Mali and Niger. As a result, media and political attention in Germany regarding development policy and humanitarian aid has risen sharply. Lastly, an issue that has received growing attention in this context is political communication due to suspicions that actors from within and outside the region are spreading disinformation. At least some African partners are highlighting this as an emerging challenge and a possible area of support – i.e., using development cooperation to strengthen capacities for countering disinformation.

Conclusions and recommendations

The Russian aggression against Ukraine has affected German development policy in several ways. It has changed the overall context in which German development policy operates, while Russian actions in Africa have also had a direct impact on German development cooperation in individual countries. In negotiations and consultations, assessments of the war in Ukraine have become a recurrent topic of discussion between Germany and African partners. Some thematic priorities, especially those pertaining to food and energy security, have become more important as a result of the war's repercussions. The issue of German energy security and supply chain resilience is also much more present in the discourse of German development policy, which applies to Senegal, for example.

In principle, the demand for multi-alignment, which is increasingly being advocated by African countries,⁷⁸ is an important point of reference for German development policy. The German government emphasizes that their development policy supports an eye-to-eye partnership approach and the political emancipation of African partners. However, this can become an area of tension if, in some cases, African partners adopt a different position on Russia (with parallels to China). Overall, German development policy should consider the below points moving forward.

First, to an important extent, German development aims to focus on the interests of African partners. This approach also serves the interests of German foreign and defence policy. Germany does not view development policy as a short-term policy instrument, such as by suspending cooperation in response to political changes, but as an approach that attempts to continue cooperation relationships even under difficult conditions by changing procedures (e.g., shifting towards civil society support).

Second, multi-alignment is a comprehensible and plausible position for African partners. This approach is part of the political emancipation of many African partners, which needs to be accepted.

Third, German development policy retains or gains credibility with African partners, not least by advocating fair global governance structures that adequately involve African partners. The inclusion of the AU in the G-20 is a critical first step.

⁷⁸ Isaac Mugabi, "Rwanda's Kagame defends Russia's presence in Africa," Deutsche Welle, April 19, 2023, accessed Dec 5, 2023.

Finally, the continued provision of development policy funds at the current level is likely to be one of the key credibility issues in cooperation with African partners. German development policy, the German Federal Government and the German Bundestag should take this into account even more in their strategic orientation in the face of increasingly scarce budgetary resources and increased competition for resources, which are, in part, due to the increasing requirements of Ukraine.

German and European Raw Material Policy in Africa

Melanie Müller and Meike Schulze

The Russian invasion of Ukraine accelerated the ongoing transformation of mineral supply chains globally. Amidst escalating geopolitical tensions, the imperative of securing mineral resources and processing capacities for strategic technologies became a political priority in Germany and the European Union (EU). Mineral-rich African countries have become the focus of attention, due to their abundance of mineral resources needed for the transition to renewable energy, electric mobility and digitalisation. German and European engagement on the African continent must follow a comprehensive strategy that goes beyond geopolitical alliances and the securing of raw materials. It must build long-term partnerships, support local development objectives and strategically foster industrial cooperation. Conversely, it is important that the African Union (AU) and its members further refine their objectives vis-à-vis the EU, and play a more active role in shaping the agenda.

New confidence and opportunities for Africa

Russia's war against Ukraine revealed the profound implications of the EU's high dependence on Russian oil and gas, and underscored the political imperative of reducing critical dependencies. China has become the centre of attention due to its dominant position in many mineral supply chains; it plays a crucial role in smelting and refining. Many raw materials extracted in African countries are exported to China for processing before they can be used for the production of goods (such as cars or wind turbines) in other countries.⁷⁹ In response, the EU has aligned with the US in an attempt to explore new strategies for diversifying supply chains and reducing dependence on China. To this end, the EU is about to finalise the *European Critical Raw Materials Act (CRMA)*. A crucial element involves the Commission's objective of establishing strategic partnerships with resource-rich African countries.

In the evolving geopolitical landscape, many mineral-rich African countries find themselves in a position where they can choose their trade partners. Countries endowed with relevant reserves of scarce minerals – such as lithium – are particularly keen to seize this opportunity to overcome their role as mere suppliers of unprocessed raw materials and to integrate into global value chains. Thus Zimbabwe, Ghana, Namibia and others have already introduced or are discussing new export restrictions or bans on unprocessed raw materials.⁸⁰ Major industrialised nations often decry these policies as "resource nationalism"; but such measures highlight the new confidence of resource-rich African countries.⁸¹

Thanks to rising demand, African nations can use their mineral resources as leverage during negotiations for cooperative agreements. This has led to renewed efforts by African governments to secure support for local industrialisation, a longstanding priority. It is also

⁷⁹ Bonnie Glaser and Abigail Wulf, "China's Role in Critical Mineral Supply Chains," GMF: *China Global Podcast*, podcast, 2 August 2023, accessed 15 November 2023.

⁸⁰ Abdulwasii Hassan, "What Africa stands to gain from a ban on export of raw materials," *TRT Afrika*, 10 October 2023, accessed 10 November 2023.

⁸¹ Antony Sguazzin, "Next Africa: Resource Nationalism or a Fair Share?," *Bloomberg*, 20 June 2023, accessed 15 November 2023.

motivated by the need to address public demands for participation in emerging developmental opportunities. Concurrently, the political focus is on identifying "strategic" or "critical" minerals for domestic economic development. The aim is to advance a holistic development model, instead of being driven solely by demand from the EU, the US or China.⁸²

African efforts to move up the value chain

A significant barrier to successfully adding value to local mining sectors has been the rigidity of supply chains, and the prevailing geopolitical structure hindering mineral-rich African countries from value chain upgrading.⁸³ Ongoing geopolitical shifts have the potential to initiate a restructuring of global supply chains, which would create space for transformation. Currently, at the continental level, the African Development Bank (AfDB) and the African Minerals Development Centre (AMDC) are developing an *African Green Mineral Strategy*.⁸⁴ To this end, feasibility studies are being conducted to assess potentials in African extractive sectors and to identify opportunities for regional value chains.⁸⁵ These approaches build on previous efforts, such the *African Mining Vision*, formulated by the AU back in 2009.

Several African countries already prioritise mineral exploration, continuously discovering new deposits. The development of digitised cadastral systems plays a vital role in increasing their chances for success. They are providing an overview of existing deposits to companies that want to acquire licenses for mining operations or want to invest in further processing.⁸⁶ Furthermore, they are an important condition for the successful implementation of local content strategies. This includes the establishment or expansion of energy and transport infrastructure.⁸⁷

Visible changes are already evident in the Southern African Development Community (SADC). Particularly promising is the prospect of a "battery cluster", developing downstream industry based on relevant mineral reserves in Zambia and the Democratic Republic of Congo (DRC).⁸⁸ The project has been generating substantial interest from international companies and policymakers alike thanks to early financial and political support from the US government.^{10,89}

The project in SADC illustrates that the most important factor for the integration of resource-rich countries into higher value creation is identifying a business case: industrial policy projects must be underpinned by actual business-to-business relationships. These

⁸² Chatham House, *Africa's Strategic Minerals*, conference (report in preparation), (Abidjan: Chatham House, 19–20 September 2023), accessed 22 November 2023.

⁸³ Gavin Hilson, "The Africa Mining Vision: A Manifesto for more Inclusive Extractive Industry-led Development?," *Canadian Journal of Development Studies* 41, no. 3 (2020): 417-431.

⁸⁴ Melanie Müller, "The 'New Geopolitics' of Mineral Supply Chains: A Window of Opportunity for African Countries," *South African Journal of International Affairs* 30, no. 2 (2023): 177-203.

⁸⁵ African Development Bank, interviewed by Melanie Müller, Abidjan, 22 September 2023.

⁸⁶ Ed Stoddard, "Explainer: A mining cadastre and public transparency," *Daily Maverick*, 10 April 2023, accessed 15 November 2023.

⁸⁷ Inga Carry, Melanie Müller, and Meike Schulze, "Elemente einer nachhaltigen Außenpolitik. Partnerschaften für lokale Wertschöpfung in mineralischen Lieferketten," Arbeitspapier (Berlin: Stiftung Wissenschaft und Politik (SWP), Jun, 2023), accessed 22 November, 2023.

⁸⁸ Deon Cloete, Neuma Grobbelaar, and Talitha Bertelsmann-Scott, *SADC Futures of e-Mobility: EVs as Enablers of a New Energy Paradigm* (SAJIA, 2020), accessed 22 November 2023.

⁸⁹ Folashadé Soulé, *What a U.S.-DRC-Zambia Electric Vehicle Batteries Deal Reveals About the New U.S. Approach Toward Africa* (Washington, D.C.: Carnegie Endowment For International Peace, Aug 21, 2023), accessed 15 November 2023.

are increasingly contingent upon commitment to sustainable governance, given the rising demands for social and environmental sustainability in green industrial projects.⁹⁰

Outlook and policy recommendations

Several projects similar to the SADC battery cluster are underway. China is leveraging its position as a global leader in renewable energy and e-vehicle manufacturing and has already proposed producing components for these industries in Africa. Saudi Arabia is also actively seeking to realise projects.⁹¹ This highlights the very competitive environment in which the EU and Germany must make lucrative offers to African states.

The process of the CRMA is important to develop a joint EU strategy, since member states will not be able to diversify their supply chains individually. It is crucial to enter into dialogue with African countries now to identify tangible projects that strengthen the implementation of strategic partnerships. These must be mutually beneficial, clearly supporting local value creation in African countries. A raw materials policy that aligns the aims of EU member states, while simultaneously incorporating African priorities, will mark a shift from development cooperation to a long-term commitment to cooperate on economic and industrial projects.⁹²

To implement such a strategy, EU member states must actively strengthen cross-sectoral thinking. For example, EU hydrogen partnerships offer a good starting point to explore links to the raw materials sector, because minerals are needed for hydrogen technology production.⁹³ Following the US initiative in SADC, the EU together with European companies should identify viable business cases and thereby underpin partnerships with downstream projects. The German government can contribute by intensifying efforts to incentivise business activity, while advocating for financial synergies at the European level. Projects should be supported by the Global Gateway initiative, and be factored into European support for infrastructure corridors in some African regions.⁹⁴

⁹⁰ “ESG remains the top focus for miners, but capital risks increase as mineral demand pressure builds amid energy transition,” *EY Press release*, 12 October 2023, accessed 15 November 2023.


⁹¹ cf. footnote 87; Gracelin Baskaran, *Saudi Arabia Has a Strategic Advantage in Sourcing Critical Minerals from Africa*, Commentary (Washington: Center for Strategic and International Studies (CSIS), 5 December 2023) accessed 5 December 2023.

⁹² Franziska Müller, *Energy Cooperation between Africa and Germany: Development, Diplomacy, Transformation* (Berlin: Africa Policy Research Institute (APRI), 23 April 2023), accessed 22 November 2023.

⁹³ Prognos, Öko-Institut, and Wuppertal Institut, *Souveränität Deutschlands sichern. Resiliente Lieferketten für die Transformation zu Klimaneutralität 2045* (Berlin: Stiftung Klimaneutralität, 2023), accessed 22 November 2023.

⁹⁴ Emilie Bel, “The EU Global Investment Initiative that Could Close Africa’s Infrastructure Gap,” *AfricaSource* (blog), 5 May 2023, accessed 15 November 2023.

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