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**Middle Powers and Africa:**

**Global South-South Relations and  
the Scramble for Geopolitical Power**

**By**

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**30 December 2025**

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**Table of Contents**

<b>Executive Summary .....</b>	<b>Page 3</b>	<b>Page   2</b>
<b>1. Introduction: The New Scramble for Africa? .....</b>	<b>4</b>	
<b>2. Turning the Tide of Development: Global South-South Relations and African Resources .....</b>	<b>4</b>	
2.1 Intra-African Relations .....	5	
<b>3. Strategic Interests: Securitization and Diplomacy .....</b>	<b>6</b>	
3.1 India .....	6	
3.2 Türkiye .....	6	
3.3 GCC States .....	7	
3.3.1 Saudi Arabia .....	9	
3.3.2 UAE .....	9	
3.3.3 Qatar .....	9	
<b>4. Implications and Challenges for African States .....</b>	<b>10</b>	
<b>NOTES .....</b>	<b>11</b>	



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Meryem Agostini

## Middle Powers and Africa: Global South-South Relations and the Scramble for Geopolitical Power

30 December 2025

### Executive Summary

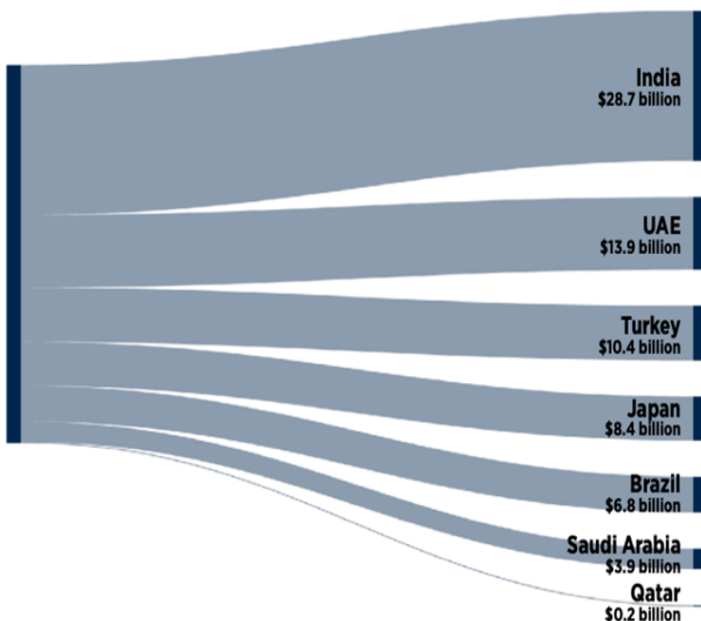
Page | 3

- ✦ As middle powers seek to expand their geopolitical influence on the global stage, they have come to engage Africa through economic and security initiatives, prompting debates over a potential ‘new scramble’ for the continent. This has been driven by great power rivalries which have left a power vacuum on the continent for middle powers to leverage.
- ✦ African states such as Kenya, South Africa, and Nigeria have risen to global influence by pursuing membership to international forums. States have also led efforts to boost intra-regional cooperation through trade-blocs to serve frontier markets and support global export participation.
- ✦ For India, countering Chinese influence and rebalancing power dynamics around the India ocean has propelled both diplomatic and security policies towards the continent.
- ✦ Türkiye’s strategy towards Africa has historically been characterised by differentiating itself from western powers and has now evolved to pursue trade and military interests.
- ✦ GCC states have shifted towards a long-term investment approach, recognising that resource rich African states can meet their needs as they seek to reduce reliance on hydrocarbons.
- ✦ The scramble for geopolitical power poses several challenges for African states, namely the reproduction of asymmetrical power relation with new powers.

### Key Picture: Share of African Exports and Imports to Middle Power Countries, 2023

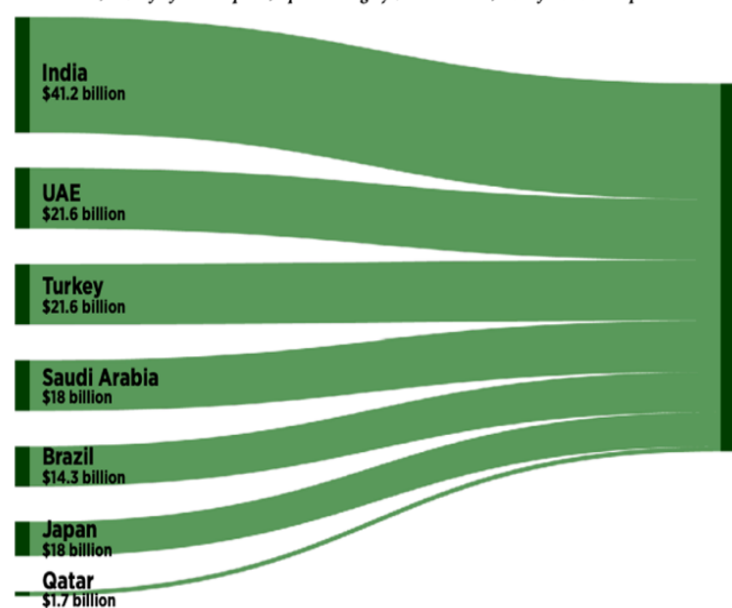
#### African Exports

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



#### African Imports

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



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

## 1. Introduction: The New Scramble for Africa?

Africa's strategic importance has re-emerged as global and middle powers seek to expand their geopolitical influence through renewed economic and security engagements, prompting debates over a potential "new scramble" for the continent. In 2024 alone, foreign investment in Africa surged by 75% to reach \$97 billion - representing 6% of global FDI compared to a 4% share in 2023.<sup>1</sup> Moreover, superpowers such as China and Russia have significant influence on the continent, leveraging aspirations and grievances against Western-led frameworks to legitimise their own political, military, and economic projections.

Page | 4

However, as US-China-Russia rivalries intensify and traditional Western aid and investment decline, middle powers are increasingly filling these emerging power-vacuum by offering a 'third option' distinct from superpower alliances. Moreover, middle power interests are strongly aligned with African states who seek to reshape global institutions and foment stronger south-south relations. In fostering these alliances, middle powers strategically invoke historical and cultural ties: positing themselves as counterweights to colonial powers (Turkey, Japan), shared anti-colonial struggles (India, Brazil), and ancient trade networks (Saudi, Qatar, UAE).<sup>2</sup>

Consequently, middle powers have established a series of multilateral, bilateral and targeted engagements across African states covering security, economics, and diplomacy. In 2023 alone, these middle powers (namely: Turkey, Japan, India, Brazil, Saudi, Qatar, UAE) collectively contributed to 18% of Africa's imports and received around 12% of the continent's exports, reflecting their growing economic footprint on the continent. Security and diplomatic approaches are diverse: GCC states and Turkey back opposing factions in Libya, Sudan, and Somalia; while India and Brazil have positioned themselves as advocates for Africa within global institutions, promoting its inclusion in the G20 and calls for UN Security Council reform.<sup>3</sup>

Thus, for some middle powers African insecurity provides the environment to exercise proxy conflicts, while for others African states present potential diplomatic allies on the global stage, strengthening the bloc against hegemonic powers. Both indicate that middle powers are incrementally securing advantages for their increased regional and global influence.<sup>4</sup>

## 2. Turning the Tide of Development: Global South-South Relations and African Resources

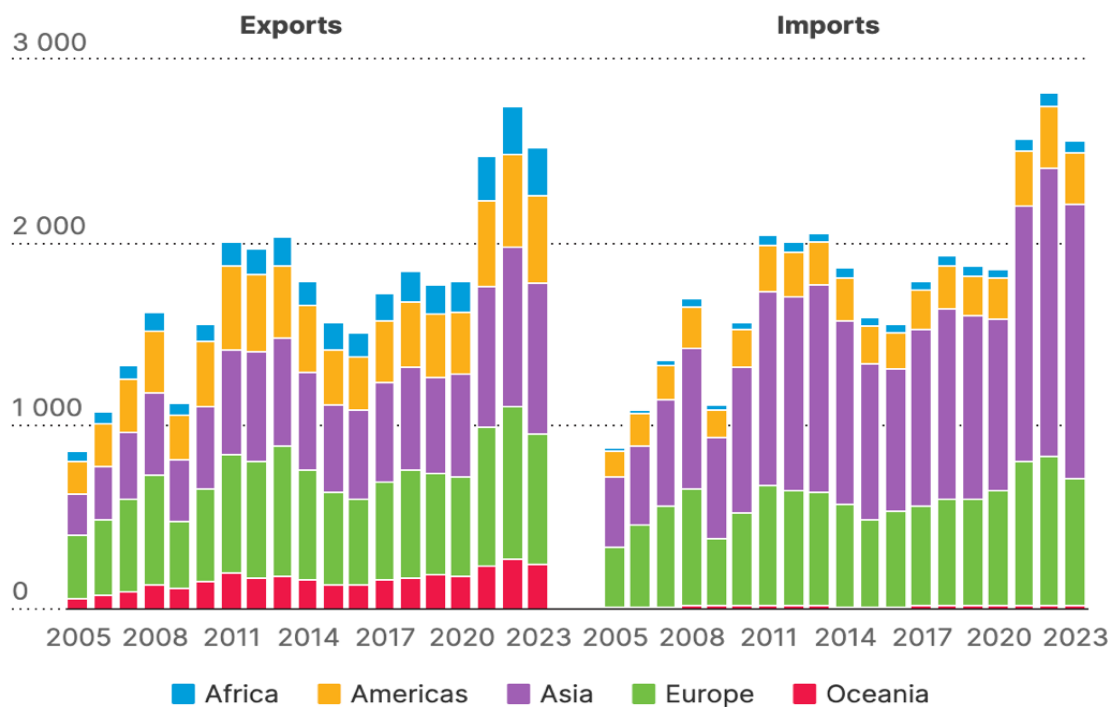
African development, long characterised by dependency and unequal integration, is largely a product of the post-war international order and colonial subjugation. Neo-liberal reforms (Washington Consensus, Bretton Woods) undermined the development of new states, rendering them vulnerable to the volatility of the global economy, dependent on FDI and IMF loans that are accompanied by conditionalities and regulatory barriers which further impede constructive development.<sup>5</sup> Now, new discourses of transformative change, solidarity and historical affinity with global south partners provide the ideological substructure for rising powers to exercise economic influence in Africa, potentially superseding these traditional aid mechanisms.<sup>6</sup>

This shift in Africa's development trajectory is exemplified by the continent's gradual move away from reliance on Western agencies toward diversified partnerships and contested multilateralism. Policies such as the "Look East" approach, alongside the adoption of the China model of industrialisation and the Brazilian model of social protection (*Bolsa Família*), illustrate how middle and rising powers are reshaping African development discourse.

These models have been embraced as pragmatic alternatives to the structural adjustment policies of the Washington Consensus. For instance, Ethiopia, Rwanda, Mauritius, and Nigeria have adopted China-sponsored initiatives such as the Economic and Trade Cooperation Zones and Agricultural Technical Demonstration Centres. Yet, while these engagements promise developmental gains, replicating the Chinese dual-growth model without adapting it to local resource endowments and institutional capacities risks reproducing dependency in new forms.<sup>7</sup> Nevertheless, this demonstrates that Africa's engagement with Global South partners is not only based in economic goals, but a redefinition of progress and cooperation in a multipolar order - providing a favourable environment for middle powers to increase their own influence on the continent.

African raw materials and critical mineral abundance is at the forefront of its development potential (holding around 50% of global cobalt, 40% of manganese and significant lithium deposits, REE's and PGM),<sup>8</sup> but impeded by lack of industrialisation and end-market upgrading. The shifting geopolitical landscape could be the key to changes across the continent's, driven by broader diplomatic objectives, and securitization of economic and trade alliances. The nearshoring and 'ally-shoring' of GVCs which could promote further technological spill-overs is already underway with China's opening of light manufacturing and automotive assembly plants in Ethiopia, South Africa, Morocco, Nigeria, and Kenya amongst others.<sup>9</sup> For middle powers alike, access to critical energy minerals such as copper, cobalt, nickel, lithium, graphite, REEs and aluminium in order to construct, build and store renewable energy, drives policy towards African states.<sup>10</sup>

**Figure 1: Total Value Exports and Imports of Raw And Semi-Processed Critical Minerals, by Region, in Billions of Dollars (USD), 2005 – 2023**



Source: UNCTAD calculations based on UN Comtrade Database (United Nations, 2025)

Beyond raw materials, African policy frameworks and demographics present an encouraging outlook for south-south trade and development cooperation. Governments are offering tax breaks, land concessions, and regulatory incentives to attract foreign investment. Nigeria for instance has positioned itself as a regional gateway for low labour costs and favourable taxation. The continent's demographic profile is characterised by over 60% of its population being under 25,<sup>11</sup> and a growing urban market – positioning it as an attractive source of labour absorption as other global manufacturing hubs tackle declining labour availability and aging populations that are driving trends towards deindustrialisation.

### 2.1 Intra-African Relations

Whilst drawing attention to exogenous power relations, it is important to acknowledge that internal state trajectories have demonstrated an increase in regional and global influence – the agency of African countries should not be subverted when forming a holistic understanding of regional dynamics.

Kenya, for instance hosts the UN Environment Programme's headquarters, highlighting its role as a continental hub for international cooperation. It is also the largest economy in East Africa with a 5.6% GDP growth in 2023

and recently spearheaded the African Continental Free Trade Area (AfCFTA) negotiations, with the aim to boost intra-African trade by 53% in 2030.<sup>12</sup> Similarly, South Africa and Nigeria are considerable rising powers on the global stage, able to offer legitimate diplomatic leverage to international coalitions and sway institutional change.

Regional trade blocs and coalitions are particularly important in the African context. An overview of Africa's geography highlights small land-locked states and regional fragmentation. Accordingly, states have formed regional trade bloc to benefit from global trade such as the ADC, ECOWAS, COMESA (formerly PTA), and ECCAS, the most export value of which is contributed by Nigeria, South Africa, Kenya, and Rwanda.<sup>13</sup> Coalitions have effectively served frontier markets and the weakest states. The Cotton Four (Benin, Burkina Faso, Mali, Chad), for instance have undertaken offensive agendas focused on liberalisation and achieved legitimate classification through wielding the larger symbolism of their cause as a touchstone for deeper concerns about economic and political justice within North–South relations.<sup>14</sup>

### 3. Strategic Interests: Securitization and Diplomacy

Middle and rising powers that search for regional and global influence amidst current global tensions must diversify from superpower alliances, project their own power, and work towards their shared goals of a multipolar order. Acting as counterweights to US-China-Russia, middle powers are well positioned to increase ties with African states without antagonising great power tensions. By increasing bilateral and multilateral economic relations in conjunction with strategic security goals, these states can attempt to temper the security externalities of free and unmitigated trade whilst bolstering their global influence.<sup>15</sup>

#### 3.1 India

In character with the rising powers of the global south, India has espoused itself as a leader based on anti-colonial history and shared diaspora ties rooted in the migration of Indian laborers and traders to Africa during the British colonial era (an estimated 3 million people).<sup>16</sup> Accordingly, India's bilateral diplomatic efforts have seen over 100 African leaders received in New Dehli from 2015 to 2022 and large bilateral India-Africa Forum Summits in 2008, 2011, and 2015 with the goal of pushing UN reforms, climate change initiatives and solidifying development goals. Furthermore, India-Africa trade has grown around 18 percent annually since 2003 and has become its third largest trading partner, and from 2013- 2023 India provided around \$32 billion in credit to 42 African countries.<sup>17</sup>

Considering rising protectionism and trade securitisation, the upending of the global trading order is propelling middle powers such as India to identify new markets for growth. Africa's growing consumer market could be the answer to India's own development goals as the country makes its bid to become a key hub of high-tech manufacturing. Markedly, pharmaceutical, textile, and automobile sectors could be at the forefront of capturing these opportunities.

In security, India's strategic aim to counter Chinese influence and enhance regional maritime security has shifted initiatives towards nations bordering the Indian ocean, signalling the strategic importance of Africa for regional rebalancing. Key sites have been established to project Indian naval power in the region, for instance the development of a military facility on the Agaléga Islands (Mauritius), and a revised agreement to build military infrastructure on Assumption Island. Joint security initiatives are underscored by the Africa-India Field Training Exercise (AFINDEX), which in 2023 saw troops from 25 African nations train alongside the Indian army.<sup>18</sup>

#### 3.2 Türkiye

Türkiye's ambitions towards Africa are broad have evolved from soft power initiatives based in shared cultural and religious practises, to systematic security and economic cooperation in recent years. Of critical importance in Türkiye's approach towards Africa is the claim of 'exceptional moralism', espousing itself as a benevolent actor by participating in aid initiatives, expansion of NGO's, schools, and businesses.<sup>19</sup> This is vital to distinguish itself

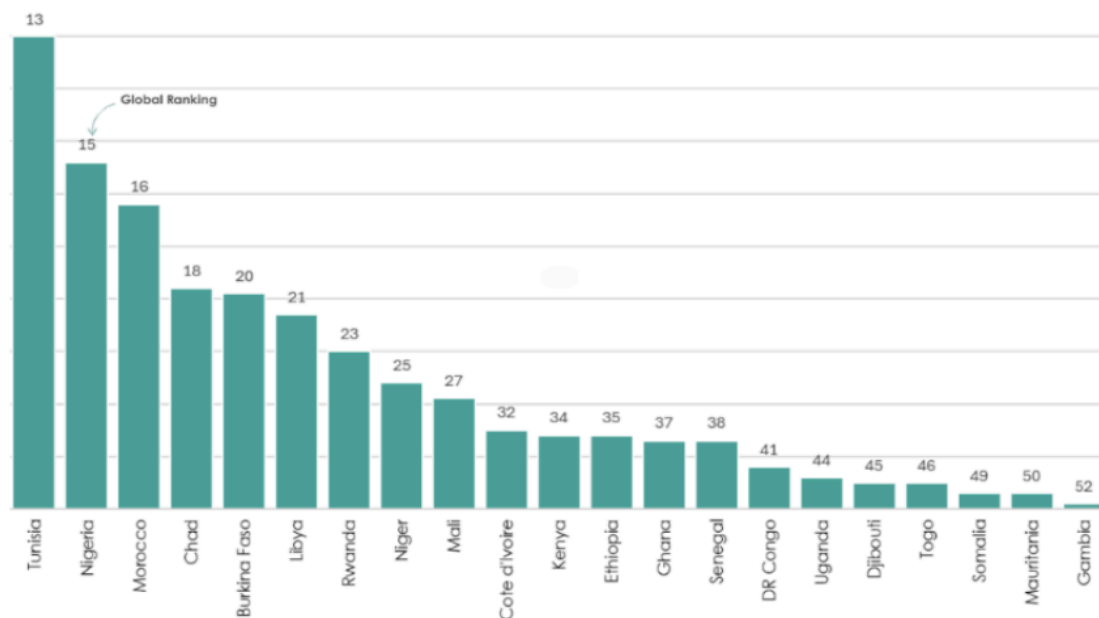
from Western powers who are considered to be led by purely geopolitical goals or seek to exploit offshore oil and gas resources.

Although this benevolent image served as an effective method to penetrate the region, Ankara's sights are set on subsequent expansion in trade and military interests. Since the launch of the 'African Initiative Policy', trade with the continent has increased from \$5.4 billion in 2003 to \$37 billion in 2024. In 2024 Africa imported \$21.5 billion of goods from Türkiye compared to \$730 million in 1990, underscoring its growing consumer market and strengthened trade relations.<sup>20</sup> On top of this Türkiye has signed oil exploration deals with both Senegal and Somalia.<sup>21</sup>

Similarly, its expanding influence has increased the salience of security and military cooperation in its foreign policy and is particularly interested in the Horn of Africa due to its importance to trade and access to the Indian Ocean. Not only is Türkiye the fourth largest arms exporters to Africa after China, Russia and France, but has sought to solidify its direct involvement in Africa's military operations. Ankara has established its largest overseas military facility in Mogadishu and conducts training of security forces in Ethiopia, Kenya and Uganda. Likewise in February 2025 the Turkish Armed Forces signed an agreement with Chad to establish two military bases (Abeche and Faya-Largeua), near the borders of Libya and Sudan. Thus, demonstrating its capability not only to fill the power vacuum left by France in the region but also its strategic use of the Horn of Africa as a proxy for power struggles with Saudi and the UAE.

For African states, Türkiye is an alternative external security partner to the self-centred and exploitative West. For Türkiye, like other middle and rising powers, aligning with diverse partners in Africa opens greater strategic opportunities without antagonising great power relations – a clever balance as both a NATO member and Global-South actor.

**Figure 2: Top African Recipients of Turkish Arms, 2015-2025**



Source: Stockholm International Peace Research Institute Arms Transfers Database

### 3.3 GCC States

Gulf State interests in Africa have shifted from a traditional aid model to a strategic long-term investment approach. Arguably, this is driven by GCC states seeking to reduce their reliance on hydrocarbons which is met by African capacities consistent with this trend (untapped resources, growing markets and sizeable youth population). Consequently, the whole of Africa's energy demand will likely increase by 30% by 2040 (including



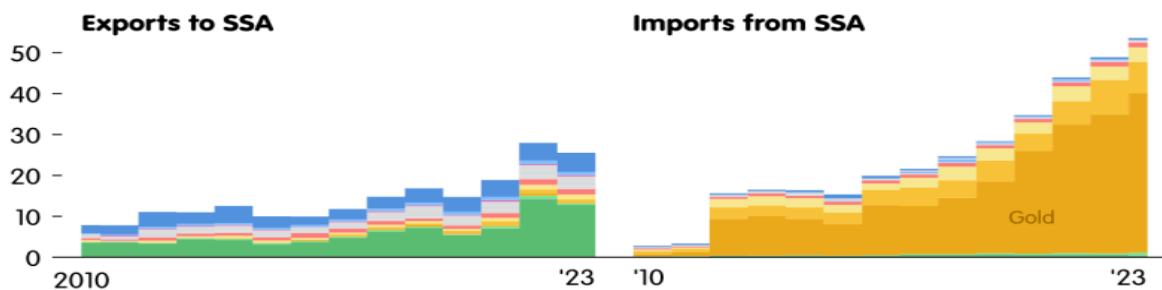
fossil fuels), creating a large consumer market for GCC exports.<sup>22</sup> In 2022 and 2023 alone, GCC states invested approximately \$113 billion in foreign direct investment (FDI) into the continent, outpacing their total investments during the previous decade.

Broadly, Gulf State geo-strategic interests are twofold: (1) reinforce their positions as logistical and commercial gateways between Africa, Asia and Europe (through the Suez), and (2) secure access to vital minerals to diversify their economies and achieve technological progress. Accordingly, they focus on investments in ports, airports and transport networks which facilitate trade flow, and investment in African mining operations. For example, Qatari investments include approximately \$1.3 billion in an airport under construction in Rwanda, along with Qatar Airways' codeshare agreements and stakes in several African airlines (RwandAir, Air Botswana, and Airlink in South Africa).<sup>23</sup>

**Figure 3: Composition of Gulf Trade with Sub-Saharan Africa, 2010-2023 in Billions of Dollars (USD)**

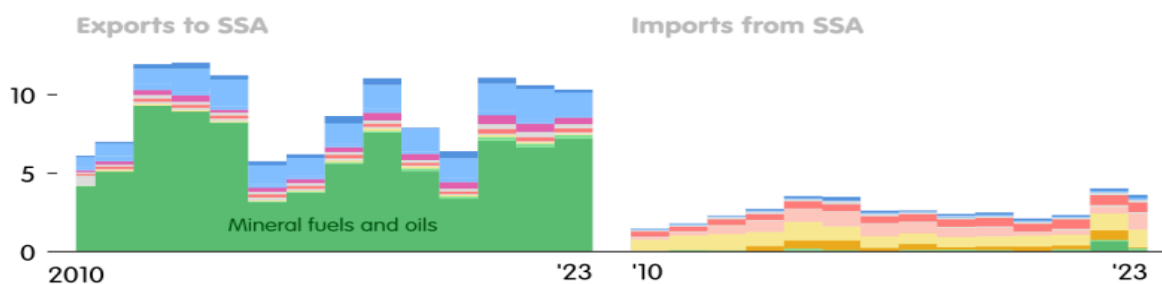
Gold, other precious metals and stones, and other metals Mineral fuels and oils, other mineral products Machinery, plastics and polymers Fertilisers Food

### UAE

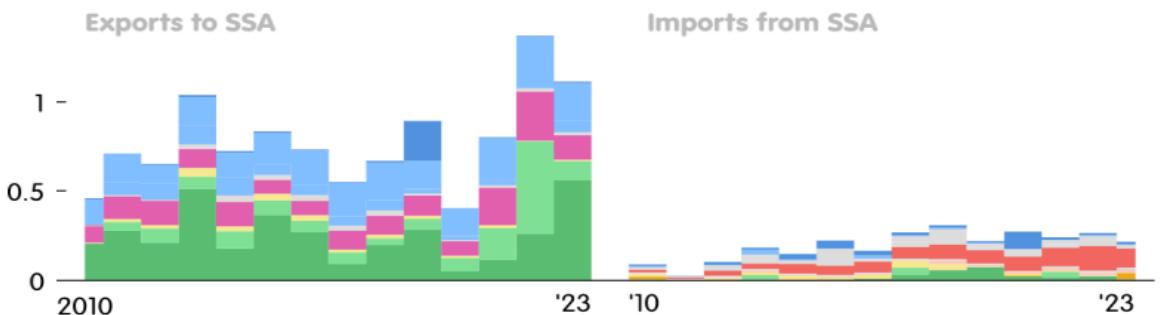


ECFR · ecf.eu

### Saudi Arabia



### Qatar



Source: CEPII "BACI: International Trade Database at the Product Level", ECFR – ecf.eu. (Chart includes an independent Y-axis scale)



### 3.3.1 Saudi Arabia

Saudi-Arabia's policy towards Africa is informed by the pursuit of energy security and economic diversification. Unlike Qatar and the UAE, internal socio-economic constraints and high unemployment rates have resulted in a more risk-averse stance.<sup>24</sup> Access to African minerals is naturally critical to 'Vision 30's high-tech industries and renewable technology goals. The first Saudi-African Summit in November 2023 in Riyadh, accordingly identified its ambitions to subsume Africa into new diplomatic and economic policies under Vision 2030, pledging \$25 billion in investment, including \$10 billion as insurance for Saudi Arabian exports and \$5 billion in development financing.<sup>25</sup> Critically, Saudi's food security relies heavily on African imports with an estimated value of \$800 million from Egypt and \$825 million from Sudan, Ethiopia, Kenya, and South Africa.<sup>26</sup> Dependence on African agricultural, energy and critical mineral resources therefore steers Saudi's approach.

Furthermore, Saudi continues an active security policy across on the continent. Under MBS, Saudi has intervened in North and East African conflicts in support of regimes such as the Sudanese Armed Forces and Libyan National Army, part of a broader effort for its own economic diversification and increase foreign influence. Post-war reconstruction for instance, could facilitate capitalisation of the Libyan crude oil industry, emphasising energy security as the underlying driver of many of its policies.

### 3.3.2 UAE

The United Arab Emirates has emerged as a pivotal actor in North and East Africa, leveraging ownership of strategic ports and trade corridors to expand political and economic influence. This is potentially informed by its lack of a significant domestic industrial capacity and subsequent need for bigger trade routes to secure revenues.<sup>27</sup> Emirati logistics giant Dubai Ports World (DP World) for example, manages multiple ports in the Red Sea and Somalia, integrating Africa into a broader maritime and logistics policy.<sup>28</sup> Like Saudi Arabia, Qatar and Turkey, Abu Dhabi has backed military forces in the Horn of Africa. In Sudan, the UAE finances the Rapid Support Forces (paramilitary) against the Saudi-backed Sudanese Armed Force, indirectly aligning itself with Russia's Wagner group whose mines in Southwest Sudan are guarded by RSF units and whose gold is redirected through Abu Dhabi before heading to Russia. To counter the influence of Qatar and Turkey, the UAE has simultaneously cultivated ties with Somaliland and Puntland, strengthening its foothold in the Red Sea corridor.

Economically, the UAE has become the fourth largest partner to Africa in finance, agriculture and telecoms and overall largest Gulf investor, with commitments totalling \$97 billion from 2022 to 2023.<sup>29</sup> Filling the gap left by Western financiers, Gulf States have cemented partnerships with Africa through a mix of financing tools. In 2024, four Emirati banks helped the Africa Finance Corporation (AFC) raise \$1.15bn in the largest syndicated loan ever pooled together by the AFC.<sup>30</sup> However, behind this surge in investment lies a pattern of opacity, resource extraction and environmental commodification. Capitalising on the rapidly growing carbon credit market, the UAE has invested in forests and 'carbon sinks', facilitating higher carbon emissions for domestic firms. Blue Carbon, for instance, has secured forest land nearly the size of the UK across multiple African states to sell carbon offsetting credits to foreign firms and governments.

The UAE's dual strategy of military activism and economic greenwashing illustrates the ambiguity of middle power engagements in Africa, which although pragmatic, continue to reinforce traditional hierarchies through new mechanisms.

### 3.3.3 Qatar

Qatar, unlike the UAE and Saudi Arabia, whose diplomacy in Africa is heavily shaped by hydrocarbon-rich export imperatives and visible military footprints, has focused on its distinctive role as a global mediator and peace-broker in Africa. For instance, Doha played a key role in mediation for the Darfur Conflict, the Eritrea-Djibouti border dispute and Somali reconciliation efforts. In March 2025 hosted mediations between the Democratic Republic of Congo and Rwanda.<sup>31</sup>

Concurrently, Doha has deepened its bilateral security ties with Somalia, supplying military vehicles and investing in infrastructure while supporting the country's institutional rebuilding efforts.<sup>32</sup> This mix of dialogue-oriented diplomacy and selective security assistance suggests that Qatar is cultivating an African policy that positions it both as a constructive convenor and a serious geopolitical actor.

#### 4. Implications and Challenges for African States

Page | 10

Whilst middle power countries have risen to challenge status-quo of the global order by increasing south-south relations and multilateral financing options to allow Africa's LDC's to break reliance on traditional lenders, states should be cautious of sub-imperialism by exploitative external actors. The implication of which could be a continued cycle of indebtedness, de-industrialisation, and the reproduction of core-periphery dynamics.

Trade patterns with GCC states for instance, highlight structural imbalances with the potential to harm intra-regional trade. The Sub-saharan export profile relies on raw commodities, limiting opportunities for forward linkages and industrial upgrading. In contrast, Gulf countries capture higher-value segments of trade through refined imports and re-exports, reinforcing asymmetrical exchange relations.

Speaking on this matter in December 2024 Antonio Pedro, the Deputy Executive Secretary of the ECA (United Nations Economic Commission for Africa), warned of Africa's need to leverage its own critical mineral resources and increase integration for development. He noted, "There is no reason why we should have a repeat of the scramble for Africa, especially at a time when greater political and economic integration has also taken place at the regional and continental levels,".<sup>33</sup> Currently however, African countries generate only 40% of the revenue potential of its resources. Arguably, the challenge for Africa is not resisting external partnerships in fear of a 'new scramble', but increasing continental integration, strengthening regulatory frameworks, and pursuing industrial policies which protect local value creation so as to convert the race for global influence into genuine structural transformation.

## NOTES

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