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# The EU and China in the Global South: Perspectives from African countries

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The 2024 Forum on China-Africa Cooperation challenged the narrative of a declining Chinese engagement in Africa and waning interest from African leaders towards Beijing. This has implications for the future EU leadership as it reworks its narratives and priorities for engagement in the Global South. The logic of geopolitical rivalry and framing of the EU's Global Gateway strategy as a better alternative to China's initiatives are not supported by partner countries, who instead express a clear preference for and interest in pursuing diverse development partnerships. This paper examines how the EU's support is perceived by its partner countries, particularly in comparison to China, with a focus on the Democratic Republic of the Congo, Morocco and South Africa and their green agendas.

Interviewees from the three focus countries have nuanced views of the roles that the EU and China play in their national green agendas. They welcome healthy competition and refrain from taking sides in a geopolitical game that extends beyond their interests. At the same time, there are opportunities to explore how the EU and China can complement each other in advancing the green transition, led by partner countries and aligned with shared priorities.

Going forward, the EU should focus on strengthening its own offer by becoming more responsive to national green agendas, building on its own strengths in areas where it already receives recognition. It should also explore a more pragmatic and constructive approach towards China's role in the green transition in the Global South.

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## Acronyms

| | |
|---|---|
| BRI | Belt and Road Initiative |
| BRICS | Brazil, Russia, India, China, and South Africa |
| CBAM | Carbon Border Adjustment Mechanism |
| CoEU | Council of the European Union |
| COVID-19 | Coronavirus Disease 2019 |
| CRM | Critical Raw Materials |
| DRC | Democratic Republic of the Congo |
| EC | European Commission |
| ECDPM | European Centre for Development Policy Management |
| ESG | Environmental, Social, and Governance |
| EU | European Union |
| EUD | European Union Delegation |
| FDI | Foreign direct investment |
| FOCAC | Forum on China–Africa Cooperation |
| FMO | Nederlandse Financierings-Maatschappij voor Ontwikkelingslanden (Dutch Development Bank) |
| G7 | Group of Seven |
| HR/VP | High Representative of the Union for Foreign Affairs and Security Policy |
| IPG | International Partners Group |
| JETP | Just Energy Transition Partnership |
| KFW | Kreditanstalt für Wiederaufbau (German Development Bank) |
| MoU | Memorandum of Understanding |
| NDC | Nationally Determined Contribution |
| NPC | National Planning Commission |
| SDGs | Sustainable Development Goals |
| UN | United Nations |

# 1. Introduction

The European Union (EU)'s approach to international cooperation has changed remarkably in the last decade. While the European Consensus on Development of 2017 still firmly framed EU international cooperation around the Sustainable Development Goals (SDGs), the EU Global Strategy opened the door to a more pragmatic approach to international relations. Since then, growing geopolitical tensions fuelled by the COVID-19 pandemic, China's rising significance and Russia's war against Ukraine have contributed to a steady transition that frames the EU's global presence along geopolitical lines. The Political Guidelines for the next European Commission underline that "We have entered an age of geostrategic rivalries" in which no policy area is left unaffected (Von der Leyen 2024).

This new approach, exemplified by the Global Gateway, envisions serving European geopolitical and economic interests, and mutual interests with partner countries, while contributing to realising the SDGs. It steps away from more traditional and separate approaches to development cooperation and foreign relations. The EU presents it as a 'better' offer than those of other players, namely China, and an initiative that gives partner countries more choice (EC 2023a). Yet, framed in the logic of a geopolitical zero-sum game, this narrative has left limited space to fairly consider the different contributions that Europe and China bring to partner countries' development, let alone their potential complementarities or even synergies.

This stance may make sense from the perspective of European policymakers who have progressively lost trust in China as a potential partner, for those concerned with Europe's declining influence in the Global South[1] or those who understand the Global Gateway primarily as a strategy that contributes to the EU's economic security and competitiveness. But the zero-sum logic starkly contrasts with partner countries' preference for and interest in diverse development partnerships. These countries are also quite reluctant to be caught in a geopolitical game whose gains to them are not evident. In addition, the Global Gateway aims to contribute to sustainable development and restore the EU's credibility as a global actor and development partner. In that case, the juxtaposition of China's and Europe's contributions to global shared prosperity needs to be assessed more carefully.

In this paper, we start to deal with this multifaceted issue from the perspective of partner countries. **We ask how different actors in the Democratic Republic of the Congo (DRC), Morocco and South Africa view the Global Gateway, and the EU by extension, and what they think about its contribution to their national agendas, including versus that of China.** Based on these contexts, we assess how actors in partner countries perceive the value of cooperation with the EU and whether they would like to see more cooperation across geopolitical divides.

[1] 'Global South' is a geopolitical, rather than a geographical term, denoting several historical, political, economic and social commonalities (Heine 2023).

**This paper focuses on perceptions and narratives around the EU and of the EU vis-à-vis China in the realm of the green transition,** namely on critical raw materials (CRM) in the DRC, the EU-Morocco Green Partnership and the Just Energy Transition Partnership in South Africa. On the one hand, this is an area in which competition between the EU and China is especially entrenched, driven by the technological supremacy and market dominance that China has on critical green technologies and the subsequent European de-risking strategies (for example, CRMs) (Karkare 2024). On the other hand, as one of our interviewees put it, 'Green is the colour' of cooperation between Europe and China, where shared objectives exist and cooperation, at least at the multilateral level, is considered relatively positive (Interview, June 2024). It is an area where multiple tensions and opportunities for future potential cooperation lie.

The paper starts by presenting the Global Gateway and how the EU has positioned it in relation to China. Section 3 outlines the main initiatives of the EU and China around the green transition in the three focus countries. Section 4 delves into how EU actors present the Global Gateway and green transition initiatives at country level. Section 5 outlines the main features of the national green agendas in the DRC, Morocco and South Africa and section 6 builds on this to present local perceptions of the EU's role. Section 7 deals with how country actors perceive the EU and China and their respective values as international partners, while section 8 concludes the paper with some recommendations.

## 2. The Global Gateway and its relationship with China's presence in the Global South

### 2.1. What is the Global Gateway?

Launched by the European Commission and the EU High Representative for Foreign Affairs and Security Policy (HR/VP) in December 2021, the Global Gateway is a connectivity strategy that aims to deliver sustainable infrastructure across the globe, as well as support to health, education and research. The EU presents the Global Gateway as a comprehensive offer from Europe that aims to combine public and private investments, reaching €300 billion by 2027, and as a '360-degree' offer that combines a multi-actor approach with investments across sectors in soft and hard infrastructures. It is based on EU added value, emphasising EU values and including a strong sustainability component. As stated in the Political Guidelines for 2024-2029, **the next European Commission "will take Global Gateway to the next level by proposing an integrated offer to our partners** – with infrastructure investment, trade, macroeconomic support part of the package", with a focus in Africa on investments in transport corridors, ports, renewable energy generation, green hydrogen production and raw material value chains (Von der Leyen 2024).

Through the Global Gateway, the EU aims to drive a shift in its approach to international cooperation that builds heavily on mobilising actors under Team Europe, bringing together the EU institutions, its member states, the European financial institutions and the private sector. The leverage of private investments and their combination with more traditional development assistance are at the core of the Global Gateway. Through the initiative, the EU aims to lead on a whole-of-government approach across the EU institutions and the member states, with the intent to increase coherence between their contribution to global development and European strategic objectives (Teevan et al. 2022; Teevan and Bilal 2023; Bilal and Teevan 2024).

The Global Gateway comprises projects of national, regional and global scale. The European Commission presents all projects from its member states and the EU institutions that fall in the sectors and regions covered by Global Gateway as part of the initiative. A subset of flagship projects is intended to increase the visibility and exemplify its strategic relevance. This wealth of projects has raised **several questions on what is and what is not Global Gateway, contributing to several different interpretations and views of what the initiative is about and what it aims to achieve**, both within Team Europe and globally (Bilal and Teevan 2024).

Various factors led to its establishment. Firstly, the initiative aims to contribute to the G7's commitment to reduce the global infrastructure investment gap and, more broadly, support partner countries to fully recover from the negative impacts of the COVID-19 pandemic. It is also a vehicle to deliver on the political ambitions of the EU's international cooperation and foreign policy in a way that builds mutually beneficial partnerships with partner countries. Still, **the main driver behind its launch is a perceived need to respond to a diminishing global relevance and influence of the EU vis-à-vis China and other players in a world marked by increased political fragmentation and geoeconomic competition, while upholding its contribution to sustainable development** (CoEU 2021; Bounds and Mosolova 2024; Lefler and Costello 2024).

Economically, the Global Gateway is a core asset to deliver on EU domestic objectives, for example its open strategic autonomy, as the external dimension of the 'EU Green Deal' and the 'Europe fit for the Digital Age' strategy. It also signals to partner countries that the EU is ready to invest in economic transformation and connectivity worldwide and to widen its offer, combining aid and productive investments (Teevan 2023). Politically, the Global Gateway is meant to "create long-term, mutually beneficial partnerships" (Von der Leyen 2024) and give higher visibility and influence to European international engagement in Africa, Latin America and Asia – at a time when partner countries question Europe's added value, role and motives (Teevan et al. 2022; Bilal and Teevan 2024; Tadesse Shiferaw and Di Ciommo 2023; Lehne 2024).

## 2.2. The EU's attempt to counter China in the Global South

**Official documents and speeches make clear that geoeconomic and geopolitical competition with China is a major driver for the Global Gateway**. At its launch in 2021, Commission President Ursula Von der Leyen stated that the Global Gateway intended to be a different option from those that 'too often come with a lot of small print, which includes big consequences'. It would be different from initiatives from other players, 'implemented with a high level of transparency and good governance, and quality' and showing that 'a democratic, value-driven approach can deliver on the most pressing challenges' for local communities around the world (Von der Leyen 2021). Two years later, at the Global Gateway Forum of 2023, Von der Leyen stated that the initiative would enlarge the options for partner countries, giving them 'better choices' to investment options that often come at a high price for the environment, workers' rights or national sovereignty (Von der Leyen 2023; Jones 2023). For the EU HR/VP Joseph Borrell, the Global Gateway is an essential piece of a broader strategy that aims to better equip Europe to compete in a 'battle of offers' and engage 'proactively with partner countries, else it will be sidelined' (Borrell 2023a; see also Borrell 2023b). The Chair of the European Parliament's Foreign Affairs Committee was much more explicit and stated that 'The EU now needs to practically demonstrate to partner countries that it can make better offers than China' (McAllister 2023).

The Council conclusions setting out the Global Gateway's vision detail the issues that the initiative aims to address, including some that recall the tensions that emerged vis-à-vis China, especially after the COVID-19 pandemic. They highlight that Global Gateway's geostrategic and principled approach would be sustainable, comprehensive and rules-based. This agenda would "boost the EU's competitiveness, contribute to the diversification of value chains, reduce strategic dependencies, including on CRM, and meet the need for a secure, resilient and human-centric digital ecosystem" (CoEU 2021). Interestingly, the Council also noted that "other key economies have developed their own approaches and tools for connectivity" and calls for collaboration with like-minded countries and regions. The Joint Communication on Global Gateway presents the initiative as an enactment of democracies' ability to respond to global challenges (EC/HRVP 2021).

The EU public narrative has quite consistently presented the Global Gateway as an offer aimed at better positioning the EU vis-à-vis China in partner countries as well as part of a much wider strategy geared towards de-risking the EU economy from unwanted dependencies on China. **Yet our research reveals that some EU officials have become cautious of such framing, realising that juxtaposing the Global Gateway and China's Belt and Road Initiative (BRI), and more generally Europe and China, is counterproductive**. Instead, some EU officials present the Global Gateway as a value-based, positive and comprehensive offer on its own terms that benefits Europe's partners and Europe itself. The emphasis is more on partner countries' options and how different connectivity initiatives can complement each other (Interviews, February and March 2024; see also section 4).

The adjustment results from several factors. Firstly, **presenting the Global Gateway as an alternative to the BRI undermines the EU's offer**. There is scepticism around the EU's ability to beat China on its terms on infrastructure development as well as on scale (Interview, January 2024). Financing under the BRI is seen as fast, flexible, more tolerant to risk and guided by the principle of non-interference in domestic affairs (Van Staden 2024; Parks et al. 2023). China also has a unique model of coordinated public and private financing that Western financiers have not been able to match (Gallagher et al. 2023; Karaki 2023). Secondly, there is concern that the comparison may lead to **questioning that the Global Gateway is open to collaboration with like-minded partners but does not envision collaboration with China – a line that some fear could be exploited to undermine the EU in partner countries** (interview, February 2024).

Thirdly, **avoiding a 'competition' narrative is more in line with third countries' preference to diversify relationships and harness opportunities for their development** (Tadesse Shiferaw and Di Ciommo 2023; Garton Ash et al. 2023). As Kenya's William Ruto said in an interview with CNN, 'We are neither facing West, we are not facing East, we are facing forward, because this is where opportunities are' (CNN 2024). The statement aimed to highlight that African countries want to make their own choices and also have no interest in being pawns in a geopolitical competition in which they feel they have no stakes nor benefit from taking sides. Their development needs are large enough for multiple actors to support their agendas (Medinilla et al. 2022).

# 3. The EU's and China's role in the green transition

## 3.1. The EU's presence at county level

Green transition is a key priority of the EU Commission. The European Green Deal, launched in 2019, is a comprehensive package of policy measures to make the EU climate neutral by 2050, decoupling economic growth from resource use while ensuring social fairness. While primarily a domestic strategy, its success depends on EU relationships with third countries, for example for the supply of critical raw minerals and clean energy. At the same time, the plan has significant implications for the rest of the world, since some of its measures can lead to changes in market access to the EU and along global value chains, creating restrictions and opportunities. For example, importers to the EU will face stricter environmental standards and stronger supply chain due diligence requirements, while facing a new tax on emissions, the Carbon Border Adjustment Mechanism, on certain exports (Ashraf et al. 2024; Medinilla et al. 2021; Oguntoye et al. 2023).

The Green Deal has come under increasing pressure as cost-of-living and security concerns overshadow climate priorities. While Ursula von der Leyen confirmed that it will go ahead in her second term as EU Commission President, she has reframed green policies as measures to bolster the economy and enhance security – a shift from the more idealistic climate focus of her first term (Politico 2024a). Hence its external dimensions will remain significant, if not more prominent. Von der Leyen has pledged to deliver a "clean industrial deal" within her first 100 days in office, including new Clean Trade and Investment Partnerships 'to help secure supply of raw materials, clean energy and clean tech from across the world' (Von Der Leyen 2024).

Climate and energy are priorities under the Global Gateway. Available data shows that they account for 110 of 225 flagship projects approved in 2023 and 2024 (Bilal and Teevan 2024). Projects under transport, digital, health, education and research may also have a green component, for example on green skills development or clean transport. Meanwhile, the internationalisation of the EU Green Deal and the Global Gateway do not necessarily align. At the country level, we found that the EU green initiatives overlap, but are not always mutually exclusive nor working coherently towards shared goals.

**In the DRC**, the Global Gateway's green projects cover areas that include renewable energy generation and transmission, drinking water infrastructure and CRMs (EC 2023c; EC n.d.). In October 2023, the EU and the DRC signed a **memorandum of understanding (MoU) for the Strategic Partnership on CRMs** at the first Global Gateway Forum (EC 2023b). This is aimed at supporting sustainable and resilient CRM value chains to develop along the Lobito Corridor, while creating quality local jobs and improving the governance of its mining sector. At the time of the interviews, the signing of the roadmap on the Partnership awaited the establishment of a new Congolese government, which took place in May 2024. A first draft reportedly encompasses DRC's priorities and interests in electricity generation and transmission and local processing of CRMs, alongside the EU's priorities on transparency, good governance, business environment and accompanying measures in energy supply and agricultural value chains. The Lobito Corridor is also a flagship Global Gateway project that aims to foster trade and economic development across multiple sectors, as part of the US Partnership for Global Infrastructure and Investment.

**In Morocco**, most Global Gateway investments are in green transition, including projects related to sustainable urban development, production of methanol for green shipping and hydrogen for power generation (EU 2024). These include a large-scale Team Europe initiative (EU n.d.-a.) involving several member states to support implementation of the EU-Morocco Green Partnership, decarbonisation efforts, Morocco's green transition and a resilient and sustainable economy. The initiative involves policy dialogue and technical assistance to address climate change, support the energy transition, foster environmental protection, and promote the transition towards a green economy.

In October 2022, the EU signed a **Green Partnership** with Morocco (EU n.d.-b.), the first the EU has signed with a third country to implement the external dimension of its Green Deal. This broad-ranging partnership aims to strengthen cooperation with Morocco on energy transition and decarbonisation of the Moroccan economy, adaptation and resilience to climate change, environmental protection, and the green and blue economy. It has bolstered political and technical exchanges between the partners on these issues.

**In South Africa**, the EU participates in the **Just Energy Transition Partnership (JETP)** and brands its contribution as Global Gateway. In South Africa, the JETP is a US$8.5 billion mechanism that involves an International Partners Group (IPG) made up of the US, Japan, Denmark, the United Kingdom, Italy, Germany, Canada, Norway, France and the EU. Launched at COP26 in 2021, the JETP aims to help coal-dependent emerging economies to accelerate a just energy transition, focusing on transitioning away from coal-fired electricity. In South Africa, the agreement is quite comprehensive and includes loans and grants from public and private sectors along with policy reforms, capacity building and other initiatives designed to stimulate a wider economic transformation and a just transition. For the transition to be just, the Partnership also set aside funds for reskilling workers and capacity development of micro, small and medium-sized enterprises and municipalities. Beyond the JETP, the EU, as part of a Team Europe/Global Gateway initiative, is introducing investment platforms to fund green hydrogen infrastructure development in South Africa (Hellenic Aid 2024). There is also a flagship project on producing biogas from animal waste and other waste sources, as well as a regional/global project on sustainable aviation fuels (EU 2024).

## 3.2. China's presence at country level

Launched in 2013 by President Xi Jinping, originally named the One Belt One Road initiative, the BRI has largely focused on large-scale infrastructure investments and connectivity across the globe. Investments cover sectors such as transport, energy, telecommunication and industrial development. The staggering scale of China's overseas development finance amounted to $498 billion between 2008 and 2021 (and to $331 billion between 2013 and 2021, from the inception of the BRI). This is equivalent to almost another World Bank over the same period (Gallagher et al. 2023, Ray 2023). The BRI has proved to be quite responsive to the domestic political and economic environment in China and has served to strengthen the country's international trade ties, help Chinese firms develop new markets abroad, facilitate Chinese international lending and promote its political ties.

The BRI brings several benefits for partner countries, notably the scale of additional investments, especially in economic sectors and infrastructure, and a boost to their ability to choose among different models of international cooperation. Concomitantly, the BRI has been criticised for its lack of transparency and the heightened negative impacts for local communities and ecosystems, along with higher emissions compared to non-Chinese projects (Gallagher et al. 2023; see also section 7). Hence, pressure to improve the negative social and environmental impacts of Chinese overseas projects has mounted in several cases.

In September 2021, at the 76th United Nations (UN) General Assembly, President Xi Jinping announced that China would cancel financing of new coal-fired power plants abroad. This is a high-impact policy change since available data show that, of the $235 billion China put into energy financing abroad over 2000-2021, about two-thirds supported fossil fuels. As of 2023, the much-acclaimed announcement had been only partially executed (Gonzalez et al. 2023).

**China's BRI has entered a new phase – sometimes referred to as BRI 2.0 – in which other adaptations are taking place**. This new phase envisions smaller, smarter, more sustainable projects and a focus on strategic investments in digital and green technologies and infrastructures. China aims to manage financial, reputational and environmental, social and governance (ESG) risks better while shifting investments towards more strategic domains (Parks et al. 2023).[2] Some analysts have argued that this signals a shift towards internal economic recovery after the COVID-19 pandemic, with lower levels of overseas development financing as well as smaller project sizes (Ray 2023). Data from 2023 show a peak in Chinese financing under the BRI, reaching $92.4 billion, an increase of 18% compared to the previous year (Nedopil 2024).

[2] According to the report, by 2021, about 60% of BRI projects had "strong de jure ESG safeguards in place" and the BRI 2.0 is accelerating this trend, while retaining one of its main competitive advantages: speed in project execution.

Though numbers vary greatly, China's international financing and investments in renewable energy finance have grown in the last few years, reportedly reaching $6 billion (Gallagher et al. 2023). China has started projects in over 100 countries on low-carbon electricity generation. Further, it holds huge potential to steer a cost-effective decarbonisation across the globe, thanks to its lead in the solar and wind energy sector, still to be fully exploited (Gallagher et al. 2023; Chiyemura et al. 2021). The BRI's investments in the mining and metals industries grew significantly, reaching $19.4 billion in 2023, largely focusing on inputs relevant for the green transition (Nedopil 2024).

In 2021, **the DRC** was the biggest recipient of Chinese foreign direct investment (FDI) in Africa, with investment having grown 62% since 2018.[3] Over the past two decades, China has played a dominant role in the country's copper and cobalt sectors, a development significantly bolstered by the 2008 Sino-Congolese cooperation agreement which gave China direct access to those resources (Neema Byamungu 2022). In 2023, Chinese companies produced 75% of the total national copper production and 67% of cobalt (République démocratique du Congo 2024). Of the 62 producing companies in the DRC, 36 were Chinese (Ibid). Chinese involvement in the Congolese mining sector is not limited to extraction: Chinese companies are involved in all stages of the value chain including processing and refining (Neema Byamungu 2022). In 2023, the DRC became the second-largest exporter of refined copper after Chile, thanks to Chinese investments (Home 2024). Because of China's dominant position in the DRC's mining sector and the global CRMs supply chain, limited mining and processing can be achieved without it (Nyabiage 2023).

In 2017, **Morocco** and China signed a BRI MoU and in 2022 Morocco became the first North African country to sign a follow-up agreement facilitating joint implementation of the BRI (Kasraoui 2022). China plans to strengthen economic ties with Morocco, invest in its national green transition and industries and develop trade ties (Jazouli 2023; Zimmermann and Dahl 2024; interview, May 2024). China's investment in Morocco has grown significantly over the past decade, with several major Chinese firms investing in the country's infrastructure, energy (particularly in renewable energy projects) and manufacturing sectors (Zreik 2024). Morocco offers stability, a rich industrial landscape and cheap labour. Its proximity and access to the EU market makes it a prime destination for Chinese businesses that seek to circumvent EU trade restrictions on electric vehicles (Zimmermann and Dahl 2024). Chinese investments in Morocco's electric vehicle sector are thus booming. For instance, in 2024, Beijing's Gotion High-Tech signed a deal with the government to build the country's first electric vehicle battery gigafactory, at a cost of $1.3 billion (Zimmermann and Dahl 2024).

Morocco has committed to generate 52% of its electricity from renewable energy by 2030, and Chinese companies are involved in several large-scale solar and wind energy projects there. For example, in 2019, the Chinese photovoltaic module manufacturer, Jinko Solar, announced that it would invest $54 million in a new solar panel manufacturing plant, which is expected to produce 3 GW of solar panels per year. Energy cooperation is thus the linchpin of the economic cooperation between Morocco and China (Zreik 2024).

[3] Based on Chinese investment data (2019-2022), China-Africa Research Initiative.

**In South Africa**, BRI progress has been rather slow. In December 2015, China and South Africa signed a BRI MoU, but there are fewer BRI projects in South Africa than in many other African nations (CMS 2021). One reported reason is the limited political traction to operationalise the BRI and expedite project implementation (IGD 2023; Josie 2023). Factors such as strict local content requirements and difficulty of working with state organisations have also hindered Chinese investments. Still, South Africa is one of the top five recipients of Chinese FDI in Africa between 2019 and 2022 and China is a major trading partner (CMS 2021; Van Staden 2024; WITS n.d.).

Despite a slow start, there is renewed interest in aligning domestic policy with the BRI to accelerate project implementation, including in sectors related to the green transition. In June 2023, South Africa reached out to China to seek affordable emergency renewable energy technology to find a solution to its energy crisis (Mukherjee and du Plessis 2023).[4] In the first half of the same year, imports of solar panels from China quadrupled**,** contributing to a total import of 4GW of solar panels from China over a year (Omarjee 2023). In August 2023, during the Xi Jinping visit for the BRICS Summit, South Africa signed a joint memorandum of cooperation with Chinese entities with the aim of supporting national energy security and a better energy mix (Smit and Nyathi 2023). Chinese state-owned enterprises are becoming increasingly active in the country's efforts to shift from coal to renewable energy (Hakeenah 2023).

# 4. The Global Gateway: the EU's contribution to national goals or an alternative to China?

## 4.1. The narrative at country level

Our research highlights that, in the three countries' cases, **the EU Delegations (EUDs) tend to focus on the added value and contribution the EU brings to addressing domestic concerns** and stress the alignment of the Global Gateway and specific partnerships with the priorities of the country. This has yielded mixed results. In Morocco and South Africa the EU has partially succeeded in positioning the Global Gateway as a response to country-led agendas around the green transition. In the DRC, this has been more challenging.

**Morocco** is a key partner for the EU in renewable energy and green hydrogen and an important (future) **source of clean energy for the EU** (Němečková and Malzi 2024). Morocco is well positioned to produce and export green hydrogen to Europe due to its geographical proximity, renewable energy facilities and privileged access to the EU market. Partnering with the EU in developing a regional energy strategy, especially in green transition, offers Morocco the opportunity to affirm itself as a Mediterranean energy hub.

[4] A first delivery in November 2023 included petrol generators. It is unclear whether delivery of renewable energy equipment happened later (ITWeb 2023).

In this sense, the Global Gateway, according to the EUD, aligns well with Morocco's aim to **be more strongly connected to the EU,** for example enhancing the country's access to the EU market. European investments in the Moroccan energy sector can also help the country address its energy intensity challenges (Němečková and Malzi 2024). Yet the Green Partnership seems to be the prevalent framing of the EU for the green transition in Morocco. This is because the Partnership was negotiated first and has evolved somewhat independently: it is seen more as a political agreement on a mutually important topic. In contrast, the Global Gateway is often considered as an investment plan that aims to leverage private funding. Since the EU has used this approach in the Neighbourhood in the last 20 years, it may not be clear what innovations the Global Gateway would bring.

In **South Africa**, the EU presents the JETP as its (and other partners') response to the South African government's decision in 2021 to speed up the closure of almost all its coal-fired power plants by 2050 (Vanheukelom 2023). As such, **the EU positions its partnership as building on a domestically driven initiative centred on broad economic transformation that is both green and just.** This narrative is challenging to maintain, mainly due to the widespread fear of negative socioeconomic consequences of transitioning away from fossil fuels for energy production in South Africa. Decommissioning fossil fuel plants raises the fear of job losses and potential negative impacts on economic growth, and challenges powerful vested interests in the country (Vanheukelom 2023). In addition, the main concern in South Africa is reliable energy provision rather than green energy per se. Further, there is considerable resistance to the JETP from some political parties and government departments.[5]

**Given how politically sensitive the green transition discussion is, the focus in South Africa is on just transition and less on the Global Gateway.** The EU emphasises that the just transition element is a concept introduced by South Africa itself. In this context, the EU organises debates and involves civil society to dispel misconceptions about the benefits and risks of the green transition. But changing local perceptions about the just transition is not a primary focus for the EU, and is seen more as the responsibility of the South African government.

**In the DRC, the EU has struggled much more to position itself around the green transition and to credibly present the Global Gateway.** The Global Gateway's green projects in the DRC cover areas such as renewable energy generation and transmission, drinking water infrastructure and the Strategic Partnership on CRMs (EC 2023c; EC n.d.). Despite the ambition to develop a multisectoral comprehensive approach, national actors perceive the initiative as mostly related to critical raw minerals and the Lobito Corridor (Interviews, March 2024; see also section 6).

Research suggests that **the very nature of the Global Gateway as a geopolitical and geoeconomic initiative clouds its perception as a more comprehensive and multisectoral approach in the DRC.** Both critical raw minerals and the Lobito Corridor are core areas of interest for the EU that have epitomised the ongoing geopolitical tension between China and Western countries over strategic assets for the green transition. China holds a competitive

[5] For more information, see: Just Energy Transition Implementation Plan 2023–2027.

advantage along the CRM value chains that the EU has tried to overcome, so far without success. For example, China accounts for 66% of global refined cobalt output, while Finland, the next biggest refiner, accounts for only 10%, with both countries relying heavily on the DRC for their feedstock (Konnunaho et al. 2023; Table.Briefings 2023). Furthermore, the EU has so far struggled to put into practice its stated commitment to support local value chains to develop in the DRC, in contrast to China, for example, in the case of Congolese copper refining (Karkare 2024; Home 2024). Acknowledging these issues, the EU delegation plans to launch a communication campaign to clarify the purpose, goals and vision of the Global Gateway in the DRC.[6] This will target the public, civil society and Congolese authorities, ensuring a clear and accurate understanding of the Global Gateway's intentions and benefits.

### 4.2. The Global Gateway as a competitor to the BRI

**Our research shows that in-country EU officials tend not to communicate or present the Global Gateway, and the specific country partnerships, as alternatives to the BRI or China's presence**. Instead, they highlight how the Global Gateway and EU-sponsored projects align with local priorities and emphasise the EU's added value to meet national objectives or needs around the green transition. Competition with China or presenting the EU as an alternative to China's initiatives either does not play a role or is explicitly avoided.

There are different reasons for this. In **Morocco**, competition with China is not a factor in the way the Global Gateway or the EU-Morocco Green Partnership are framed. According to interviews, **China's presence is less obvious or more complex to assess in Morocco than elsewhere**. This perception needs to be assessed against the absence of instructions to EUDs to explicitly monitor China's activities in the country, which may result in an underestimation of China's presence. Interviews also revealed that the EU's and China's presence is weighed against that of other actors, such as the Gulf states, that play a prominent role in Morocco (Interview, April 2024).

Similarly, in **South Africa**, competition with China does not appear to be a primary concern for EU officials, mainly because they assess that **the BRI has a limited footprint in the country**. In addition, interviews reveal that using anti-Chinese rhetoric or trying to uphold the EU versus China would not be well received, as China maintains a positive image and has a close relationship with the government.[7] Further, South Africa is known to have multiple partners, including China, whose collective contribution and influence dwarf that of the EU (Interviews, 6 May 2024).

**China's presence in the field of green transition remains significant and is growing in Morocco and South Africa, as mentioned in section 3**. Still, this does not seem to be a major

[6] This initiative aims to address and refine the messaging, also in light of the DRC government's frustration over the EU-Rwanda MoU. This has sparked accusations that the EU is complicit in the instability in Eastern DRC, straining DRC–EU relations.

[7] The South African government views China as a valuable partner, highlighted by public endorsements of Chinese support during the country's energy crises, such as providing generators. There is also a historical affinity with China stemming from the Apartheid era and admiration for China's development model among the political elite.

concern for EU officials there, raising questions on whether there is an adequate appreciation of the Chinese footprint and if EUDs factor this into the design of their own plans.[8]

**In the DRC, EU officials avoid juxtaposing the Global Gateway and the EU with the BRI and China's presence in the country because they consider this counterproductive**. The EUD and some member states are aware of the major role that China plays in the mining sector in the DRC. Our research shows that, in some cases, this comes with the assessment that the EU should work with rather than fight against China's prominence. Further, presenting the EU as an alternative would risk being, in the best case, perceived as naive, and, at worst, potentially damaging for Europe's reputation. Western countries, including the EU, initiated the current geopolitical tensions and several African countries see China as being on the receiving end of these (Tadesse Shiferaw and Di Ciommo 2023, Karkare 2024).

**Despite this narrative choice, it seems difficult to disentangle the Global Gateway from the EU-China competition angle, as section 7 explores in more detail**. China's dominance in the mining sector is behind the inception of the Strategic Partnership on CRMs which aims to diversify supply chains and avoid dependency on China. The same goes with the Lobito Corridor. With very little economic diversification, mining remains the most important economic activity in the country, and a core part of the national development strategy.

Interviews in all countries suggest that **some official actors in the EU institutions and the member states are more open than others to working with China**. This stems from the assessment that displacing China is almost impossible in certain cases, such as in the mining sector in **the DRC**, or that working alongside it is unavoidable and so it is better to make the most of it, as in the case of renewable energy in **South Africa**. In a handful of instances, interviews revealed attempts to reach out to Chinese actors to scope potential partnerships, but with limited success. Reportedly, Chinese actors were not very responsive and European counterparts were unsure how to approach them. Interviewees also signalled that lack of transparency and human rights issues would need to be addressed.

## 5. Partner countries' agendas on the green transition

**The DRC** does not have an official and comprehensive strategy for its green transition.[9] Its revised 2021 Nationally Determined Contribution (NDC) is the closest document to a green transition strategy, with an important focus on forestry (République démocratique du Congo. 2021a). Other narratives by official sources and views by influential actors in the private sector help to understand the DRC's ambitions and strategy. At COP26, President Félix Tshisekedi presented a vision of the DRC as a 'solution country' (*'pays solution'*) to climate change, given

8 Our research did not focus on why some EUDs may have an insufficient grasp of China's presence in a given context and what the implications are for EU action. Further research would be needed to understand whether this highlights an important strategic misalignment in the EU or results from a rational attribution of responsibilities to EUDs that do not entail focusing on China's engagement.

9 *L'Agence Congolaise de la Transition Écologique et du Développement Durable* (A.C.T.E.D.D), the agency created in 2020 in charge of the green transition, is still expected to produce a strategic document or policy.

its forestry potential, freshwater reservoirs and abundant mineral resources (République démocratique du Congo 2021b; Gabbatiss and Viglione 2024). One interviewee in the mining industry put forward quite an ambitious view of a country "producing green minerals with green energy for the green revolution" (Interview, March 2024). The realisation of this view would set the DRC apart from other large energy producers, such as Indonesia, which rely heavily on coal.

**Turning to minerals, the DRC's focus so far has been primarily on harnessing the opportunities offered by the global green transition.** The DRC is already the largest exporter of cobalt globally and the second largest of refined copper. Coltan production is also significant. Along with Zimbabwe and Mali, the country aims to become a major lithium producer (Gabbatiss and Viglione 2024). In 2018, the DRC increased royalties on mining and ores and classified cobalt, coltan, and germanium as 'strategic minerals', as part of a review of its mining code (République démocratique du Congo 2018). But this review focused on increasing public revenues and "was not part of an overall strategic minerals policy" (Neema 2024) that sets a clear path to bring local added value and sustainable development through CRM value chains. This would include addressing the complex social and environmental violations that affect the sector as well as power shortages (Karkare 2024; Manley et al. 2022; Interviews March 2024).

**Morocco has a very articulate and ambitious green transition agenda, with a well-developed national strategic framework** (Royaume du Maroc 2021).[10] It has made considerable progress against climate change, greening its energy - especially power generation - protecting the environment and promoting the green and blue economy. Yet social and environmental concerns remain high, especially in the Western Sahara (Shehabi 2024). With substantial solar and wind resources, Morocco aims to attract investments to increase the share of renewables in power generation from 20% to 52% by 2030 and 80% by 2050 (Mohseni-Cheraghlou 2023), becoming one of the pioneers of the green energy revolution in Africa. Concerted government strategies and policies largely focused on market creation have supported the country's achievements.[11]

In 2023 Morocco launched *'L'Offre Maroc Hydrogène Vert'* ('Moroccan Offer Green Hydrogen') to position the country as a strong partner in the global energy transition, providing 4% of green hydrogen demand by 2030 (Royaume du Maroc 2023). The strategy entails an integrated approach that builds on Moroccan green energy provision, soft and hard infrastructure, land and public incentives for investors and aims to generate local jobs, wealth and decarbonise the national economy. Notably, the proposal presents Morocco as a gateway to the European market.

[10] *Stratégie Nationale de Développement Durable* (National Sustainable Development Strategy 2017), NDC in line with the objectives of the Paris Agreement (2021) and the *Nouveau Modèle de Développement* (New Development Model 2021).

[11] The share of renewable energy, including hydro electricity generation, rose from 6% in 2000 to 19% in 2020 and Morocco has also advanced significantly towards its target of 42% of installed renewable energy capacity by 2020 (Berahab 2022).

**South Africa committed to the transition to a greener economy in several policy documents**, such as the National Development Plan 2030 and the National Strategy for Sustainable Development and Action Plan (2011). At the time of writing, the National Planning Commission (NPC) was developing the 2050 pathways for South Africa, which may establish a strategic, coherent vision for green (industrial) development in the country (Montmasson-Clair and Chigumira 2020).[12] Importantly, the country has emerged as a pioneer in the global just transition movement, first introducing the concept in its 2011 National Climate Change Response White Paper (Government of South Africa 2011).

**After a decade of growing mentions but uncoordinated efforts, in 2022, the Presidential Cabinet adopted a just transition framework** (Connolly 2022). This lays out a shared vision for shifting to an equitable, zero-carbon economy and identifies key policy areas and principles to achieve this. The government aims to transform three key sectors: decarbonise the electricity system, develop electric vehicles and launch a green hydrogen industry. The framework relates to various policy areas but plays a critical role in guiding implementation of the JETP. Despite these steps, energy insecurity has become more acute in the past few years, because of corruption in procurement, persistent opposition to closure of coal plants, and coordination challenges among different ministries (Vanheukelom 2023).

# 6. National perceptions of the Global Gateway and the EU in the green transition

Our case studies show that perceptions of the EU's role in the green transition depend on geopolitical dynamics, the strength (or weakness) of national agendas and the identification of a clear added value of the EU's engagement. This is especially so for **Morocco**, which has a clear national agenda and plan that broadly matches EU interests. In **South Africa** the EU still needs to prove its alignment to national priorities and its delivery capacity. In **the DRC,** the weight of geopolitical competition is the most evident, with multiple and sometimes contrasting narratives around the EU.

**Morocco has the most positive view of the EU, according to the local stakeholders consulted for this study**. The main contributing factors are the strong national commitment to the green transition and a clear set of agreements that indicate what the EU brings and how Morocco benefits. The EU is seen as a key partner in the national green transition, providing substantial financial and technological support for renewable energies and environmental sustainability. Its commitment to sustainable development is recognised, making it a valued ally in Morocco's efforts to reduce its carbon footprint. Morocco values the access to financing, expertise and markets that Europe offers, especially in sustainable development and infrastructure cooperation.

12 At the time of writing, the NPC was reportedly still finalising a public consultation, before moving to finalise the pathways.

**Government officials tend to see the Green Partnership between the EU and Morocco as a unique opportunity to significantly advance Morocco's decarbonisation efforts** in the energy sector and its sustainable development, aligning with the new development model of the Kingdom. Notably, the Partnership is also seen as a pathway for Morocco to become a net exporter of green energy to the EU, a promising market in the long run. It is viewed by those actors as an "equal, inclusive, and productive collaboration, providing a crucial opportunity [for Morocco] to address resource scarcity and reduce dependence on energy imports from Algeria" (Něměčková and Malzi 2024). Conversely, some actors in business and academia perceive the Green Partnership as problematic, as a "European instrument of influence in the region", including as a response to China's BRI, and as a tool aimed at diversifying the EU energy sources away from Russia (Něměčková and Malzi 2024).

**The Morocco case signals complementary interests on which the EU and Morocco can build their partnership.** This may also be behind a more positive assessment of the EU's role in the green transition than of the broader relationship with the EU, under the EU-Morocco Association Agreement and the EU Neighbourhood Policy. While these make the EU a major political, economic and cooperation partner, some criticise the extent of the EU's commitment and the depth of the offer. They express a desire for Morocco to be granted access to the EU Single Market and a rebalancing of trade relationships. Others highlight the limited funds that Morocco receives compared to other countries.

**Meanwhile in South Africa, there seems to be a mismatch between respective priorities and how to execute them, despite official buy-in and initial commitments.** Local stakeholders consulted for this study perceive the EU's push for a green transition as forceful and the JETP as unresponsive to energy access and security priorities. This comes on top of concerns about the social cost of the transition (see also section 4). While the JETP was approved at presidential level, the Partnership has been marred by questioning and delays. The financing model assumes an initial catalytic investment of $8.5 billion from the IPG group that should leverage additional private and public funds. There are doubts about the adequacy of the IPG contribution – vis-à-vis a costed national plan of $98 billion – as well as concerns around rising debt levels for South Africa (Hauber 2023; Vanheukelom 2023; Van Staden 2024). Stringent conditions tied to EU funding, which is only available for specific green energy sources, are seen by many as restrictive and imposing, potentially stifling South Africa's ability to develop its strategies and infrastructure.[13] Furthermore, concrete projects are yet to materialise, with a sense that most funding has been funnelled towards civil society or research studies rather than visible infrastructure or energy projects.

[13] The EU is, for instance, seen as very strict on renewable energy funding (for example, the 2023 delegated act on renewable energy only allows funding for green hydrogen, not blue hydrogen [EC 2023d]), which reportedly pushes South Africa to look to partners like China and Japan for alternative options. Finally, there is frustration about the EU's sustainability requirements to enter its market (CBAM and other regulations).

**These perceptions build on frustrations around the EU's Carbon Border Adjustment Mechanism (CBAM)**, a levy on carbon-intensive imports into the EU.[14] South Africa stands to be heavily impacted by the measure, given that it produces 80% of its electricity from coal (Roelf and Abnett 2024). South Africa has said that the CBAM puts unfair pressure on its industry to phase out coal without a sufficient grace period or transitional support to implement such a complex measure, or consideration of the country's marginal contribution to global carbon emissions, potentially breaching World Trade Organization rules (Roelf and Abnett 2024).

**Comparatively, geopolitics seem to weigh less in shaping views about the EU's role in Morocco's and South Africa's green transitions. In the DRC, geopolitical competition shapes how the EU is perceived,** offering opportunities and challenges. Due to geopolitical tensions between China and Western countries over access to CRMs and their supply chains, the **Global Gateway is seen, first and foremost, as a geopolitical tool that the EU deploys to compete against China**. The most prominent and best understood objective is to "build a China-free CRM supply chain", in and outside the DRC and help Europe diversify its CRM supply chains away from China through near- and friend-shoring (Interviews, March 2024). This is despite acknowledging the EU's long history of engaging the DRC in the environmental component of its green transition and the broad approach of recent EU plans in the country.[15]

Similarly to other African stakeholders, **Congolese actors are not keen to be entangled in geopolitical rivalry. Still, they look for opportunities to harness this competition to the advantage of their country.** As the DRC wants to diversify its partnerships in the mining industry, which now relies heavily on China, and frame a more competitive offer compared to other countries such as Indonesia, Western countries, including the EU, could play a more prominent role in developing local value chains (Interviews, March 2024; see also section 5).[16] Interviews suggested that the EU could be a valuable partner in "cleaning up the mining industry", that is, producing green energy and abiding to higher socio-environmental standards. This could help the DRC to improve the marketability of its minerals and attract more investors with higher ESG standards, potentially starting a virtuous cycle of more sustainable production. To develop local value chains and increase processing, the DRC would need partnerships that unlock clean energy production at scale, and offer mining capabilities (knowledge, technologies and human capital) along with financing. The argument goes that investment in clean energy and a sustainable mining sector would set the EU apart from other

[14] The EU sees CBAM as a necessary mechanism to maintain fair competition as it asks its own producers to become greener as well as a mechanism that can create positive incentives in other markets. Some partner countries have criticised CBAM as a protectionist mechanism that undermines industrialisation efforts in their economies (Oguntoye et al. 2023).

[15] The multiannual indicative programme for 2021-2027 indicates that the EU aims to build on its past approach to sustainable development in the DRC and explore opportunities offered by Team Europe to focus on sustainable food production, renewable energy and forest management, as a means to achieve several objectives (EU 2021). These are to provide access to sustainable and affordable food, fight climate change, protect the environment, preserve biodiversity and promote sustainable agriculture, all areas on which the EU has worked in the past.

[16] These are diverse views on how the EU could contribute to transforming the mining sector in the DRC and do not necessarily amount to a nationally shared agenda. Cobalt was directly mentioned. Copper value chain is also of interest to the DRC, but Europe is considered in a weak position to offer industrial capacity compared to Middle Eastern countries.

players, while helping the DRC to diversify its partnerships and push up standards. The EU would gain as it would be easier for European investors to operate in the DRC as well as work towards a CRM value chain that relies less on China.[17]

**These views come with a number of caveats, if not contradictory perspectives, on the EU.** The EU's colonial past and its practices, perceived as paternalistic, raise doubts about the EU's credibility as a partner ready to endorse national agendas based on a more horizontal relationship. One interviewee from the mining industry summarised this view by describing the EU as an "arrogant partner" who comes across as one "who knows better" what is best for the country (Interview, March 2024). Another set of caveats are linked to the EU constraints in external action. **The DRC** mining industry has come under pressure due to accusations of fuelling conflict, child labour, labour hazards, environmental damage and corruption. European firms and the EU are therefore careful about investing and put extra scrutiny on the DRC, due to the fear of facing reputational damage or legal charges. For some DRC actors, this comes across as "too much too soon": while they recognise the need to solve these issues, they see EU rules as too restrictive and the EU industry as too risk averse. EU ESG standards can seem unrealistic for the DRC and hinder national development. Others point out that the EU can be an inconclusive decision-maker and a slow implementer. There is some understanding that this is because it is a collective of 27 member states, but still, this can become a 'cacophony' that does not lead to "real actions [on minerals] processing and transformation abilities" (Interview, March 2024).

**Finally, stakeholders in all three countries signalled a difficulty in understanding what the Global Gateway is about and how it relates to the green transition.** Most of them struggle to understand the added value and novelty of the Global Gateway compared to what the EU already does, let alone compared to other players. Interestingly, questions did not focus on the overarching Global Gateway narrative and strategy, but rather on what concrete projects are part of it and how the country can benefit from it to achieve strategic goals. In **South Africa** and **Morocco**, for example, the Global Gateway is barely mentioned in relation to any green transition plan. In **South Africa**, some interviewees see it as a good strategy that has not taken off yet. Others are more critical and point out that most projects are regional rather than focused on South Africa, reinforcing the idea that the EU's involvement is less direct and tangible. Finally, some interviewees wonder whether it is just the latest EU fad rather than an enduring change. In **the DRC**, the Global Gateway is linked to the green transition but is narrowly understood as being about the Lobito Corridor and critical raw minerals (see also section 4).

17 In addition, citizens in Lubumbashi and Kolwezi were reportedly interested in potential agribusiness and tourism development of the region, and regional integration through the Lobito corridor (Interview, March 2024).

## 7. The EU and China: Nuanced views from local stakeholders

As detailed in previous sections, our research highlights that local stakeholders in the DRC, Morocco and South Africa have nuanced views of the roles that the EU and China play in their national green transitions, with different benefits and shortcomings.

Interviews revealed how local stakeholders try to navigate the multiple options at their disposal. **Most often, they hope to strengthen their bargaining power with all actors** (Karkare et al. 2020). For example, in **the DRC**, interviewees reported that the signing of the MoU for the Strategic Partnership on CRMs was partially motivated by a desire to diversify from China. But they also promptly signalled that this diversification would not happen at the cost of turning away from China (Interviews, March 2024). Relatedly, **Morocco** is one of the few countries that can leverage the geopolitical rivalry between the US, China and the EU to its advantage (Neema Byamungu 2024; Natuzzi and Gebuhrer 2023). At the same time, no interviewee said that Europe is a partner that they would dismiss or abandon. **These examples signal that African countries want to work with all partners, but on their own terms. Further, they often look at non-Chinese investments as a way to increase their leverage versus China, and vice versa**.

**In the case study countries, stakeholders interviewed did not make a strong case for collaboration between the EU and China**, although they did not oppose it in principle. Still, most interviews revealed that the reflection on whether and how the EU and China could work more together was not very articulate in most cases. The political calculus may be that it is not worth investing in such a proposition yet, where a zero-sum game mentality prevails; or, rather, that more opportunities lie in competition than collaboration (Soulé et al. 2024). Some interviewees instead expressed a desire or even the necessity of cooperation and offered some ideas. This means that they might be open to proposals for some form of ( trilateral) cooperation between them, the EU and China.

**If cooperation and coordination were to happen, then partner countries would have to set the terms**. Past research shows that national conditions strongly influence how international actors interact in given contexts, so stakeholders in partner countries could also be a driving force in the case of China and the EU, if they see the benefits (Helly et al. 2015).

**Another point was that the spotlight on China may neglect the contributions of other important actors**. In all three countries, interviewees named the Gulf states and Turkey several times as alternative partners, potentially offering better opportunities than the EU or China. This was the case for the energy sector in **Morocco** and, prospectively, for increasing industrial capacities for copper processing in **the DRC**. Indeed, the focus on great power competition has largely distracted the EU from an analysis of other actors in development, while they often play quite an important role.[18]

[18] Russia may be an exception, though this is often looked at only through the security dimension.

Other factors influence perceptions of the EU and China as partners in the three countries. Firstly, **political sensitivities around national concerns sometimes matter more than geopolitics**. Several interviewees in **the DRC** mentioned that the EU-Rwanda MoU on Sustainable Raw Materials Value Chains signed in February 2024 presented the greatest setback for the EU's reputation. The Congolese authorities have brought up this issue repeatedly with European counterparts, signalling their dissatisfaction and a lack of engagement with the DRC. The Western Sahara conflict plays a key role in **Morocco**'s approach to its partnerships and has disrupted relations with individual EU member states in recent years (Férnandez-Molina 2024). China's ambiguous stance over the Western Sahara has become more difficult to sustain, as the country aims to strengthen ties with Morocco while keeping strong ties with Algeria (Jackson 2024). As China ascends to global power status, expectations of other countries on if and how China deals with national and regional issues may change. China may find that, to further its diverse and widening international interests, it will need to navigate national and regional politics more intensely and adapt its principles for international engagement, such as non-interference in domestic affairs of sovereign states.[19]

The political attention that China lends to African governments, from head of states' mutual visits to three-yearly Forum on China–Africa Cooperation (FOCAC) gatherings,[20] is an element that plays in China's favour. Conversely, Europe's colonial legacy, its moralising attitude towards Africa and poor political engagement hamper dialogue and ultimately Europe's credibility.

**Secondly, economic concerns remain in all countries**. According to **South Africa**'s statistics, the country runs a large trade deficit with China, and the make-up of its own exports basket to China – primarily raw products – fuels negative sentiment (Shelembe 2024).[21] **In the DRC**, there is disappointment over China's seeming unwillingness to meet demands to further local cobalt processing and build a national electric vehicles batteries value chain.[22] Similarly, there is scepticism that the EU will deliver on similar commitments. These grievances have to be weighed against some questions around the economic viability of battery production in the DRC, considering the large-scale investments needed in energy, logistics, industrial sites and more – as well as questions on its capacity to create inclusive growth for DRC citizens (Radley 2024). **Morocco** is trying to emancipate itself from a 'structurally unbalanced economic relationship' with the EU through strengthening relations with other partners, although dependence in financial and trade terms is still strong (Férnandez-Molina 2024). Still, as the country strengthens its relations with China, the government has raised concerns around trade imbalances and is wary not to position Morocco merely as a source of minerals, such as phosphate (Zoubir 2022: Zimmermann and Dahl 2024; Jackson 2024).

At a more practical level, the EU and China are considered to have different assets and limitations. **The Chinese business model is better attuned to African governments' demand**

[19] Some analysts argue that this is already happening on security issues. See, for example, Hartmann and Noesselt (eds) 2020; Sciorati 2024.

[20] The ninth FOCAC Summit 2024 took place in Beijing from 4 to 6 September 2024.

[21] Chinese data instead show a surplus (GACC 2024).

[22] Chinese entities own 15 of 19 cobalt mines in the DRC. Some processing happens locally.

**for quick and visible results** (Opalo 2023; Medinilla et al. 2022). Interviewees pointed out that Europe has a lot of room for improvement. While not exhaustive of the JETP's limitations, the lack of concrete projects in **South Africa** plays against the EU's reputation and limits its ability to prove that the programme can exemplify a just green transition there. In **the DRC**, China's reputation as a pragmatic and business-minded partner contrasts with an EU seen as focusing too much on internal discussions rather than on concrete steps to support CRM value chain development in Africa.

**China and Europe are appreciated for their technology and expertise, giving them several opportunities to support national green agendas**. China is hailed by analysts and public officials for its huge potential to green the African energy matrix and improve energy access, although this comes with challenges (Medinilla et al. 2022; Chiyemura et al. 2021). Chinese companies benefit from a distinct edge in clean and cheap energy technology provision, particularly solar. Their technological expertise is appreciated in **Morocco** and **South Africa**, where there is interest in investments and technology transfer, particularly in renewable energy and infrastructure. Their contracting ability is also appreciated. European and American companies are better known as project developers of utility-scale renewable energy (Van Staden 2024, Baker and Shen, 2017). Due to the colonial past, the EU has a potentially unparalleled knowledge of **the DRC** geology and mining potential. The Earth Science Archives at Belgium's Africa Museum were mentioned. As the DRC wants to improve geological knowledge, there are opportunities for DRC-EU cooperation in mining operations and to reinforce capacities in public administration (Interview, March 2024).

**High social and environmental standards are considered a real added value of the EU. In Morocco** and **the DRC**, the EU's focus on socioeconomic development and the environment enhances its credibility as a partner in the national green transition and distinguishes it from China. In **Morocco**, one interviewee suggested that the EU could have a competitive advantage over China, which is perceived as carrying higher environmental risks (Interview, May 2024). Congolese interviewees assumed that the EU would combine socioeconomic development with its mining activities. Reportedly, communities in Lubumbashi and Kolwezi were optimistic about the Lobito Corridor for its potential to combine connectivity with socioeconomic development (Interview, March 2024). As evidence on **the DRC** suggests, dialogue with local actors and a patient approach are key to ensure that the EU approach and standards are in line with the context (see also section 6).

**Conversely, local stakeholders express frustrations around China's approach to environmental and social standards**. The sentiment was the most acute in **the DRC**, where interviewees mentioned that Chinese companies fuel corruption and bad governance in the mining sector (Anderson 2023). Relationships with local communities have come under strain, as they lament poor working conditions and a lack of engagement (Interviews, March 2024). Recent studies found that while China-financed projects improve local livelihoods, they fall short of meeting China's own ESG standard for overseas projects (Springer et al. 2023; Owusu et al. 2024). Chinese government guidelines have progressively endorsed international standards, moving away from following host country requirements, but still, there is significant room for improvement in ESG practices. The so-called BRI 2.0 may offer opportunities to do so (Parks et al. 2023).

**Our interviewees concurred with analysts' assessment that Western, including European, and Chinese entities should work closely to improve ESG standards more quickly**. To some extent, this is already happening: China increasingly outsources ESG and risk management to international companies, many from Europe, given their strong expertise and reputational benefits (Van Staden 2024). Further, China has increased its participation in joint lending with multilateral institutions and Western commercial lenders, all of which have stronger standards (Parks et al. 2023). Along this path, Chinese entities would learn from international best practices and improve their reputation. European companies and governments would find it easier to create a fairer competitive environment and raise the bar on governance and sustainability standards. But the key players remain African institutions, whose role in setting and maintaining high ESG standards is crucial.

**Interviews suggest that arrangements that exploit compatibility and complementarity between Europe and China to support partner countries' agendas, rather than direct cooperation, are also possible**. For example, one interviewee in t**he DRC** suggested that the EU should invest decisively in green energy.[23] This would help resolve a major bottleneck for industrial development. The EU objective should not be to displace China as a mining producer, but rather support local processing in the DRC.

Another interviewee mentioned that the DRC would benefit from better governance, including in terms of striking better deals with China. China would be "inclined to work with the Europeans and make certain concessions to maintain and strengthen its presence in the DRC" and improve its image in the country (Interview, March 2024). The EU would offer experience in supporting governance reforms and benefit from a better business environment. While there are several arguments against cooperation in this area on the Chinese and EU sides, pragmatic considerations may tip the balance towards cooperation at some point.

**Throughout the research, we stumbled on cases in which European and Chinese entities have been working on the same projects already**. The construction of the 100 MV Redstone clean energy complex in South Africa was financed by South African and international investors, including Dutch (FMO) and German (KFW) development banks (Biram 2021). Project developers are from South Africa and Saudi Arabia, and the construction was in the hands of PowerChina. This example illustrates the possibility of cooperation between public European and Chinese state-owned entities. European private firms are accustomed to working with Chinese entities. [24]

[23] For national actors, this would also include hydropower, considering the large potential of the country in that regard.

[24] For example, the Congolese-Chinese company, SICOMINES acquired extraction technology from the Finnish Outotec, now Metso Outotec, (Mining Technology 2020). In the urban centre Katembe in Mozambique, which is linked by bridge to Maputo, the bridge was constructed by the China Road and Bridge Corporation, but the ESG monitoring was done by the Portuguese firm Nemus (Van Staden 2024).

## 8. Conclusion

While the EU sees China's role in the Global South through the lens of a zero-sum game, partner countries want to keep their options open. They welcome competition and do not seem invested in making cooperation happen. At the same time, they are not opposed to cooperation and signal some areas where complementarity and synergies exist.

The balance of the tripartite connotation of China as a partner for cooperation, an economic competitor and a systemic rival (EC/HRVP 2019) has decisively tilted towards the latter two in recent years, as the Von der Leyen political guidelines make clear. The colossal disagreement on how to respond to the war against Ukraine remains the defining issue of that relationship. Therefore, the EU has the difficult task of balancing partner countries' perspectives with its own economic and security priorities.

There are some ways in which this could be done. Firstly, our research suggests that **the EU should continue to strengthen its own offer rather than focus on displacing China**. EU officials in the case study countries are at the forefront: they largely focus on how the EU contributes to the national green transition rather than on what other partners bring. At the same time, our research raises questions about how well equipped the EU delegations are in keeping track of what other actors are doing, a key component to better shape the EU's presence in any given context. This area deserves future attention.

To strengthen the EU's own offer, **efforts should go into accelerating the delivery of Global Gateway plans**, while continuing adaptation and dialogue at country level. The EU's contribution to the national green transition is recognised and mostly appreciated. But the status of the Global Gateway as a distinctive offer from Europe is less defined, largely due to national stakeholders' perception of slow delivery. Still, some are ready to give it a chance, given the potential to scale up much-needed green investments. The EU's plan to better integrate trade, investments and macroeconomic support under the Global Gateway and scale up climate diplomacy could frame a more appealing offer to partners and better connect private investors with partner countries' priorities (Von der Leyen 2024).[25]

**The EU should increase the responsiveness of the Global Gateway to local agendas.** This would enhance its credibility and help build more trusting and effective relationships with partners. Consulting with a wide range of partner country stakeholders is a key and distinctive feature of EU engagement vis-à-vis that of China, though research strongly confirms that this has to be more meaningful and responsive (Teevan et al. 2021; Sabourin et al. 2023; Bilal and Teevan 2024; Teevan and Bilal 2023). In the three case study countries, the EU should frame the Global Gateway on the basis of local concerns and priorities such as energy security, employability in the green economy and the economic benefits of the green transition, more than the green agenda per se or the fight against climate change.

[25] A leaked DG INTPA document offered more details on the plan (Politico 2024b).

**The deployment of the Global Gateway also needs to be integrated with visibility and communication measures at country level**. EU actors have so far invested in and hotly debated the overall narrative and objectives of the Global Gateway. Yet country actors want to know what its strategy is about in their own country. Along with necessary dialogue, communication outreach to multiple stakeholders at country level to contextualise and present the Global Gateway needs to improve – from the EU and member states alike. Visibility and communication could also have the added benefit of ensuring the EU is recognised for and reaps the benefits of projects it is involved in, including those delivered by non-European actors.

**Within the context of a stronger offer from Europe, the EU should consider cooperation with China to achieve goals set jointly with partners.** Geopolitical and geoeconomic considerations are important, but partner countries suggest that cooperation can take many forms – from compatible initiatives to complementarity to actual trilateral cooperation. ESG seems to be an accessible opportunity that European companies are already benefiting from and that EU institutions and governments may too. Other areas may be more complex to address, both for Europe and for China.

**The approach should be both pragmatic and constructive.** Long-term strategic collaboration between the EU and China may be challenging to begin with. Initially, smaller initiatives can help build mutual trust and leave space for adjustments and experimentation. Not all settings provide the right incentives and conditions. Ensuring that the execution of the EU's principles and values is not undermined or put into question is critical as, despite the challenges and inconsistencies, it still remains a recognisable feature of the EU. Trilateral cooperation was always a challenge for the EU institutions, but less so for the member states, which could also offer a conduit in that regard, along with intermediaries trusted by both parties such as multilateral organisations.

China is an important partner for the green transition of partner countries, in some cases bringing in technology, resources or expertise that the EU cannot replace, at least not in the short term. Our research suggests that there are different views on China within the EU institutions and in member states, with some expressing more openness to work with Chinese entities and others being very opposed to it. This is partly due to the different weights that different actors give to geopolitical and development concerns as well as to business considerations. Another reason seems to be a knowledge gap among European actors on how to engage with China and its presence in the Global South. **The EU has made some investments in improving its understanding of China's presence in the Global South: it is certainly worth investing more in this area in the future.**

The FOCAC gathering remains one of the most high-profile of the "Africa+1" summits, as the high-level attendance of African representatives at its ninth edition in September 2024 shows.[26] While China's approach to Africa is becoming more cautious, President Xi Jinping

[26] 53 African countries are reported to have attended FOCAC, of which 51 represented by Heads of state or government. The African Union Chairperson and the UN Secretary General also attended (Madakufamba 2024).

communicated an elevation of China's diplomatic relations with African countries to a higher, strategic level. Taken together, the Beijing declaration and the 2025-2027 Action Plan, approved at the gathering, signal the political relevance of Africa, as part of the Global South, for China and a shared desire to set a different course in international relations (People's Republic of China 2024a; People's Republic of China 2024b). **This challenges the next EU leadership to set a political direction that better balances its geoeconomic and geopolitical concerns with partner countries' demands and perspectives to ensure that the EU stays relevant**. We hope that this paper and our future work will contribute to a constructive discussion on Europe's and China's respective contributions and possible synergies in partner countries.

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