

Beyond Dependency: Africa's Emergence in the Politics of Global Transformation

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This paper interrogates Africa's evolving position in the global political economy by challenging enduring narratives of dependency and marginality. It argues that Africa is increasingly emerging as an active participant in shaping the contours of global transformation, driven by shifts in geopolitical alignments, economic diversification, and strategic engagement with multiple external partners. Drawing on political economy and critical geopolitics, the study examines how African states and regional institutions navigate a complex landscape marked by the rise of multipolarity, expanding South–South cooperation, and intensifying competition among global powers. Rather than portraying Africa as a passive recipient of external influence, the article highlights forms of agency expressed through infrastructure diplomacy, resource governance, and regional integration initiatives. At the same time, it critically assesses the structural constraints that continue to shape Africa's integration into global systems, including uneven interdependence and persistent asymmetries in trade and finance. The findings suggest that Africa's emergence is best understood not as a linear transition from dependency to autonomy, but as a negotiated process of repositioning within a reconfigured global order characterized by both opportunity and constraint.

Keywords: *Africa; global transformation; dependency; multipolarity; political economy; global governance; South–South cooperation; regional integration; strategic agency; development dynamics*

Introduction

For much of the twentieth century, Africa's place in the global political economy was largely defined for it rather than by it. The continent was consistently framed as peripheral—economically dependent, politically vulnerable, and structurally subordinated to external powers. Classical theories of development and international relations reinforced this image, portraying Africa as a passive participant in a global system dominated by industrialised core states. Within this framework, Africa's role was reduced to that of a supplier of raw materials and a recipient of external intervention, with little room for independent agency or strategic choice (Amin, 1976; Wallerstein, 1974). These perspectives were not entirely misplaced. Historical experiences of colonial extraction, unequal trade relations, and financial dependency left deep structural imprints on African economies and governance systems.

Today, however, the global landscape has shifted substantially. The rise of emerging economies and the gradual movement toward a more multipolar world have opened new spaces for engagement and repositioning. China has become Africa's largest

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single trading partner, accounting for 20.4 percent of the continent's exports in 2022, up from 3.7 percent in 2000 (UNCTAD, 2023). India, Turkey, and the Gulf states have also expanded their economic and diplomatic footprints. At the regional level, the African Continental Free Trade Area (AfCFTA), which commenced trading in 2021 with 54 signatories, signals a growing institutional commitment to self-directed economic integration. These developments suggest that Africa's global engagement is being qualitatively transformed — but transformed in what direction, and to whose benefit?

The central analytical question motivating this article is whether the observed diversification of Africa's global partnerships represents a genuine transition beyond structural dependency, or whether it constitutes a reconfiguration of dependency under new terms. This question cannot be resolved by theoretical argument alone; it requires systematic empirical examination. Yet the existing literature on Africa's global position remains divided between structural accounts that emphasise the persistence of dependency and agency-focused accounts that celebrate Africa's growing autonomy, with limited integration of these positions and limited grounding in systematically assembled evidence. This article addresses this gap by developing a rigorous analytical framework and evaluating it against multi-domain empirical evidence spanning two decades.

The article advances three original contributions. First, it specifies five explicit analytical propositions derived from the theoretical framework, each of which generates testable empirical implications examined against quantitative indicator data. Second, it introduces a cross-domain causal mechanism analysis — comparing trade diversification, debt structure, regional integration, and export composition — that permits structured inference rather than anecdotal illustration. Third, it proposes the concept of negotiated repositioning to theorise the empirical finding that Africa occupies an evolving position characterised by real but highly uneven and structurally constrained agency — a position that neither simple dependency nor simple autonomy narratives can adequately capture.

Literature Review

Classical Dependency and World-Systems Perspectives

Dependency theory and world-systems analysis have long provided the dominant frameworks for interpreting Africa's position in the global political economy. Framing Amin (1976) and Wallerstein (1974) as central reference points is entirely reasonable, but the discussion would benefit from engaging with the recent revival of dependency theory within contemporary international political economy. Recent work by Oliveira and Kvangraven (2023) revisits the 1972 Dakar conference and makes a strong case for treating dependency theory not as a closed, historical framework, but as an evolving and still relevant decolonial perspective. Bringing this literature into the conversation would help position dependency theory as a living intellectual tradition rather than a legacy approach.

This matters in particular because the article's concept of “negotiated repositioning” appears to respond—at least implicitly—to the limits of classical dependency arguments.

That response would be more compelling if it were framed in dialogue with these newer reinterpretations, rather than primarily with the original formulations. Engaging with contemporary revisions of dependency thinking would sharpen the theoretical contribution and make clearer how the argument advances, rather than simply departs from, the tradition.

Post-Dependency Approaches and African Agency

A growing body of scholarship has sought to foreground African agency in global affairs. Bayart's (2000) concept of extraversion highlights how African elites historically leveraged external relationships to consolidate domestic power and secure resources, actively mediating rather than passively receiving external influence. Carmody (2011) argues that the competitive engagement of multiple external powers on the continent has created spaces for African states to engage in strategic triangulation — balancing relationships with China, Western donors, and emerging powers to maximise bargaining power. Taylor (2016) documents how individual African governments have exploited the China option to renegotiate terms with International Monetary Fund programmes, with evidence from Angola, Nigeria, and Ethiopia suggesting that Chinese financing was deployed as leverage against conditional Western lending.

The agency literature, however, is not without empirical limitations. Much of it relies on illustrative case selection that identifies positive examples of strategic manoeuvring while underweighting cases where new partnerships have reproduced or worsened dependency. The Zambian debt restructuring following its 2020 Eurobond default — which involved difficult negotiations with Chinese creditors who refused to participate in a multilateral debt relief framework initially — provides a counter-example to the triangulation hypothesis that is as empirically well-documented as the success cases (AidData, 2021). A systematic approach requires examining the full distribution of outcomes rather than selecting confirming cases.

Global Transformation and Multipolarity

The use of Arrighi (2007) and Keohane and Nye (1977) provides a solid conceptual foundation for thinking about global power and interdependence, but the discussion would benefit from engaging more directly with the surge of recent scholarship on African multipolarity. A growing body of work since 2022 has begun to document how shifts in the global order are being experienced and interpreted from within Africa itself. For example, the AfriPoli report (2026) describes 2025 as a turning point, marking a clear move away from a predominantly Western-centered system toward a more fragmented and genuinely multipolar configuration. In response, African states are increasingly pursuing proactive diplomatic strategies, diversifying their external partnerships, and seeking greater fiscal autonomy—developments that closely mirror the empirical patterns this article aims to explain.

Relatedly, the Megatrends Afrika working paper series (SWP Berlin, 2025) offers important insights into how African actors are navigating this changing landscape, including the security and conflict dimensions of multipolarity that remain

only lightly explored in the present framework. Engaging with this literature would not only update the discussion but also deepen its analytical reach, particularly by foregrounding African perspectives on global transformation.

Equally important is the need to acknowledge how rapidly the external environment has shifted since the article's data window closes in 2022. The retrenchment associated with the second Trump administration from 2025, including the suspension of USAID programming, represents more than a policy adjustment—it signals a structural disruption in the global aid architecture. This has direct implications for longstanding patterns of dependency and raises new questions about how African states manage external vulnerability. Even if these developments fall outside the empirical scope of the study, incorporating them into the literature review would strengthen the argument by showing why the concept of “negotiated repositioning” has become even more analytically urgent in the current moment.

Research Gap and this Article's Contribution

The three bodies of literature reviewed above remain fragmented. Dependency theory identifies structural constraints but cannot account for variation in how different African states navigate them. Agency-focused scholarship highlights strategic manoeuvring but tends toward selective case evidence. Global transformation literature captures systemic shifts but often lacks region-specific or sub-regional differentiation. Most critically, none of these bodies of literature has been evaluated against a systematically assembled multi-domain, multi-decade empirical evidence base that permits structured comparison of where repositioning has and has not occurred. This article addresses this gap by deriving explicit empirical propositions and evaluating them against indicator data across four domains, generating a comparative pattern of findings that can ground theoretical claims more rigorously than either purely theoretical argument or illustrative case selection can achieve.

Theoretical Framework and Analytical Propositions

This article advances a theoretical framework of negotiated repositioning that integrates three theoretical traditions — dependency theory's structural analysis, asymmetrical interdependence theory's account of agency within power differentials, and critical geopolitics' attention to ideational dimensions — and derives from this synthesis five explicit analytical propositions that structure the empirical analysis.

Structural Constraints: The Dependency Foundation

The framework's treatment of dependency currently leans almost entirely on Amin (1976, 1990), which provides a strong classical foundation but would benefit from some updating. Two additions in particular could strengthen this section. First, Oliveira and Kvangraven's (2023) reworking of dependency theory as a decolonial approach to international political economy offers a more contemporary way of framing

structural constraints. Bringing this perspective into the discussion would give Proposition 1 a clearer and more up-to-date theoretical grounding.

Second, the framework would be strengthened by engaging with the growing literature on critical mineral dependency as a modern form of structural integration. While the article rightly notes that “China buys African raw materials as readily as Europe did,” the nature of those raw materials has shifted significantly. Today, resources such as cobalt, lithium, copper, and rare earth elements occupy a central place in global green energy transitions and semiconductor supply chains. This shift creates a more complex dynamic: on the one hand, it gives African states new sources of geopolitical leverage; on the other, it introduces new forms of structural vulnerability. Recent developments highlight this changing landscape. The Democratic Republic of Congo’s temporary cobalt export bans in 2025 (African Energy Chamber, 2026), alongside intensifying competition among the United States, European Union, China, Japan, and Gulf states for access to African critical minerals (Hira, 2025; ScienceDirect, 2025), point to a broader structural transformation. Incorporating these dynamics into the dependency framework would help capture how commodity dependence persists, even as its underlying political economy is being reshaped, thereby reinforcing the core claim of Proposition 1.

Agency within Asymmetrical Interdependence

The framework currently draws on Keohane and Nye (1977) but does not take into account how the concept of interdependence has evolved in more recent scholarship—particularly its reconceptualization as a tool of statecraft, including the literature on “weaponised interdependence.” Bringing in these developments would not only update the theoretical foundation but also sharpen the framework’s analytical reach.

More importantly, the article does not engage with emerging work that shows how African states are actively using their critical mineral endowments to renegotiate their position within the global economy. Recent analyses, such as the SAIIA report (February 2025) on the geopolitics of energy minerals, argue that intensifying competition among major powers creates new strategic openings for African governments. As the report notes, “competing interests provide a policy lever that Africa can use to form mutually beneficial” partnerships—an insight that speaks directly to the triangulation hypothesis and is grounded in more current empirical developments than earlier accounts like Carmody (2011).

In light of these shifts, the framework would benefit from reconsidering whether asymmetrical interdependence, as originally formulated, fully captures the dynamics at play. The growing global dependence on minerals critical to the green transition has introduced new forms of leverage that were not central to the Keohane and Nye baseline, nor fully anticipated in the original triangulation thesis. Incorporating this dimension would allow the framework to better reflect how Africa’s bargaining position is being reconfigured, even as underlying patterns of dependence persist.

Critical Geopolitics: Discourse and Material Change

Critical geopolitics emphasises that Africa's global position is shaped not only by material factors but by how the continent is represented in global discourse. The Afripoli (2026) analysis documents how the 2025 G20 summit in Johannesburg — the first on African soil — marked a discursive and institutional milestone in this narrative shift. Critical geopolitics would prompt the same caution about this new narrative as about "Africa rising": discursive repositioning without structural change in productive capabilities is fragile. Making this argument explicit in the theoretical framework would actually strengthen the article's concept of negotiated repositioning. The 'Africa rising' narrative represents a discursive shift with material implications — it attracted investment and diplomatic attention — but critical geopolitics cautions that discursive change without structural material change is fragile and potentially serves external interests in accessing African markets and resources rather than genuinely reflecting African developmental transformation.

Analytical Propositions

Proposition 1: Africa's trade partner concentration has declined measurably over the 2000-2022 period, reflecting genuine repositioning away from traditional Western partners. However, this partner diversification has not been matched by product diversification: primary commodity dependence has persisted, indicating that repositioning has altered the geography but not the structural character of Africa's global integration.

Proposition 2: New South-South financial partnerships, particularly with China, have provided African states with additional financing options and bargaining leverage, but the terms of Chinese lending have become less concessional over time and have contributed to debt accumulation that reproduces financial dependency in altered form.

Proposition 3: Regional integration through AfCFTA represents a genuinely novel form of collective agency that has the potential to support structural transformation, but implementation remains incomplete and the agreement's developmental impact will be limited by the persistence of commodity export dependence in most member states.

Proposition 4: Strategic agency within Africa's global engagement is highly differentiated rather than uniform: states with higher institutional capacity (governance effectiveness, policy coherence, state capacity) achieve better outcomes from diversified partnerships than states with weaker institutions, suggesting that agency is not inherent to all African states equally but is conditional on domestic institutional conditions.

Proposition 5: Africa's global position is best characterised as negotiated repositioning — a process in which structural constraints are real and enduring, agency is genuine but uneven, and the direction of change is neither inevitably toward greater autonomy nor inevitably toward renewed dependency but is contingent on policy choices, institutional capacity, and the specific configuration of external partnerships.

Research Design and Methodology

Research Design

This study employs a structured qualitative comparative design (SQCD) combined with domain-specific quantitative indicator analysis. The SQCD approach (Beach and Pedersen, 2019; Fairfield and Charman, 2022) is appropriate when causal relationships are complex, when mechanisms matter as much as correlations, and when the number of cases or domains is small enough to permit detailed analysis but large enough to support comparative inference. Rather than a single case study, the analysis examines four analytically distinct domains of Africa's global engagement — trade partner diversification, South-South financial partnerships, regional integration, and export product structure — treating each domain as a 'case' in the comparative design while drawing on cross-domain patterns to evaluate the overarching propositions.

Within each domain, the analysis proceeds through two complementary strategies. First, quantitative indicator analysis tracks measurable dimensions of change over the 2000-2022 period using the data sources specified in Table 1. This provides the systematic empirical base that is largely absent from the existing literature. Second, process tracing within each domain examines the causal mechanisms through which structural constraints and strategic agency interact — specifically, whether the patterns observed in the quantitative data are consistent with the theoretical mechanisms predicted by the integrated framework or require modification of those predictions.

Multi-Scalar Analytical Approach

The study adopts a deliberately multi-scalar perspective, examining processes at the continental, sub-regional, and country levels where data permit. Continental aggregates are used for propositions about overall structural position; sub-regional disaggregation (East Africa, West Africa, Southern Africa) is used to examine variation in export diversification trajectories; and country-level examples are used to trace causal mechanisms identified in the aggregate data. This multi-scalar approach is essential for avoiding the continental homogenisation that characterises much existing literature: the empirical evidence shows marked sub-regional and country-level variation that a single aggregate analysis would obscure. The finding that East Africa's average export HHI improved from 0.31 to 0.19 between 2000 and 2022, while West Africa's improved only from 0.61 to 0.55, is precisely the kind of variation that requires explanation and that single-level analysis cannot provide.

Data Sources and Operationalisation

Table 1 presents the full operationalisation of theoretical concepts, specifying indicators, sources, temporal coverage, and analytical roles. Eight indicator series are used across the four analytical domains.

Table 1. Variable Operationalisation, Data Sources, and Analytical Roles

Concept	Indicator/Measure	Source	Period	Role in Analysis
Trade partner diversification	Share of Africa exports/imports by partner bloc (%); Herfindahl partner-concentration index	UNCTAD BACI; AfDB	2000-2022	Measures repositioning away from traditional partners
South-South financial engagement	Chinese loan commitments to Africa (USD bn); India/Gulf FDI flows (USD bn)	AidData TUFF; UNCTAD	2000-2022	Quantifies new partner engagement depth
Debt sustainability	External debt / GNI (%); Chinese debt share of total external debt (%); debt service / exports (%)	World Bank IDS; AidData	2005-2022	Tests whether new partnerships reproduce financial dependency
Resource export concentration	Hirschman-Herfindahl export product concentration index (0-1)	UNCTAD BACI	2000-2022	Tests whether structural commodity dependence persists
Institutional agency capacity	WGI Government Effectiveness percentile; CPIA score; AfCFTA implementation status	World Bank WGI/CPIA; AfCFTA Secretariat	2005-2022	Proxy for state capacity to exercise strategic agency
Regional integration depth	Intra-African trade (% total); AfCFTA tariff schedule submission rate; NTB notifications	UNCTAD; AfCFTA Secretariat	2015-2022	Measures collective agency through regional institutions
Geopolitical bargaining outcomes	Infrastructure project financing terms (grant/loan ratio); concessional rate vs. commercial rate; local content requirements	AidData; IMF DSAs	2005-2022	Evaluates whether triangulation improves terms of engagement

Note: UNCTAD BACI = Bureau of Analysis and Intelligence database for trade flow data at HS product level. AidData TUFF = Tracking Underreported Financial Flows dataset (AidData, 2021). WGI = World Bank Worldwide Governance Indicators. IDS = International Debt Statistics. CPIA = Country Policy and Institutional Assessment. HHI = Hirschman-Herfindahl Index. DSAs = Debt Sustainability Analyses.

The export product concentration index is operationalised as the standard Hirschman-Herfindahl Index applied to export values disaggregated at HS4 product level: values approaching 1 indicate extreme product concentration, values approaching 0 indicate maximum diversification. The trade partner concentration index is the analogous HHI applied to export destination shares, enabling comparison of partner

versus product diversification. The distinction between these two indicators is theoretically central: it permits empirical separation of partner diversification (who Africa trades with) from structural diversification (what Africa produces and exports), which the propositions treat as distinct and potentially divergent processes.

Scope Conditions and Limitations

Three scope conditions and limitations must be acknowledged. First, the study analyses Sub-Saharan Africa as the primary unit of analysis for aggregate indicators, with North Africa included in trade partner data where indicated. This reflects data availability and comparability constraints. Second, quantitative indicators provide measures of outcomes but cannot fully capture the quality of negotiations or the micro-political dynamics within specific deals; the process tracing component partially addresses this limitation by drawing on qualitative evidence from existing case studies. Third, the two-year AfCFTA trading period within the data window is insufficient to assess its long-term structural impact; the analysis therefore treats AfCFTA as an institution-building process and assesses the quality of that process rather than its developmental outcomes, which will require longer data series to evaluate.

Quantitative Evidence

Trade Partner Diversification

Table 2 presents Africa's export and import partner shares from 2020 to 2025, drawn from UNCTAD trade flow statistics. The data reveal a structural transformation in the geography of Africa's trade that is empirically substantial and consistent across time periods.

Table 2. *Africa's Trade Partner Diversification — Export and Import Shares by Partner (%), 2020-2025*

Trade Partner	Exports 2020	Exports 2022	Exports 2024–25 (est.)	Imports 2020	Imports 2022	Imports 2024–25 (est.)
European Union (EU)	~33%	~33%	~30–32%	~31%	~25%	~25–28%
China	~17%	~12–13%	~14–16%	~22%	~18%	~20–22%
United States	~6%	~5%	~5–6%	~6%	~5%	~5–6%
Intra-African Trade	~18%	~16–18%	~18–20%	~15%	~14–16%	~15–18%
India	~6%	~7%	~6–8%	~5%	~6%	~6–7%
Other (incl. Gulf, Turkey, etc.)	~20%	~20%	~18–22%	~21%	~26%	~22–25%

Source: UNCTADstat (2024–2025), IMF Direction of Trade Statistics (2024), African Development Bank (2024), EU trade statistics (2024), and CARI China–Africa trade data (2024).

Note: Shares (%) of Africa's total exports and imports by partner (2020, 2022, 2024–2025 est.). "Other partners" includes Gulf states and emerging partners; intra-African trade covers all regional flows. HHI based on UNCTADstat and IMF DOTS.

The partner concentration data continue to support the first component of Proposition 1, though the pattern is now better understood as gradual diversification rather than a dramatic structural break. Africa's trade partner concentration has declined over time, reflecting a broader spread of export destinations and import sources. While the European Union remains Africa's largest single partner, its share of exports has moderated to roughly 30–32 percent in recent years, down from earlier dominance. The United States' share has stabilised at a relatively low level of around 5–6 percent, while China has consolidated its position as a central trading partner, accounting for roughly 14–16 percent of exports and a significantly larger share of imports.

At the same time, intra-African trade has shown slow but meaningful expansion, rising toward 18–20 percent of exports in recent estimates. Although still limited in structural terms, this trend reflects the cumulative effects of regional economic community integration and the early implementation of AfCFTA, rather than a sudden post-2020 shift. Additional partners—including India and Gulf states—have also increased their presence, contributing to a more diversified but still uneven trade landscape.

These developments are significant not just descriptively, but theoretically. They challenge the rigid partner-specific assumptions often associated with classical dependency theory, which tends to view peripheral economies as locked into stable relationships with a fixed set of core partners. Over the past two decades, Africa's external orientation has become more fluid, with China emerging alongside, rather than simply replacing, traditional European dominance.

However, this diversification in partners does not imply a transformation in the underlying structure of trade. As the export composition data in Section 5.3 demonstrate, Africa's major partners—whether in Europe, China, or elsewhere—continue to source predominantly primary commodities, including crude oil, copper, cobalt, and other raw materials. In this sense, the core exchange relationship identified by dependency theory remains largely intact: a pattern of commodity exports in exchange for manufactured imports. What has changed is not the structure of dependence itself, but the range of actors through which it is mediated.

Debt Structure and Financial Dependency

Table 3 presents recent trends in Africa's external debt structure over the period 2022–2025. These data are essential for evaluating Proposition 2 — whether emerging financial dynamics, including South–South partnerships and increased market-based borrowing, are reshaping or reinforcing patterns of financial dependency.

Table 3. *Africa's External Debt Structure and Sustainability Indicators (2022–2025)*

Debt Indicator	2022	2023	2024 (Est.)	2025 (Proj.)
Total External Debt (% of GDP)	63.2%	64.8%	65.5%	65.0%
Public & Publicly Guaranteed Debt (% of GDP)	52.1%	53.7%	54.3%	53.9%
Private External Debt (% of GDP)	11.1%	11.1%	11.2%	11.1%
Debt Service (% of Exports)	18.7%	21.3%	22.5%	20.8%
Interest Payments (% of Revenue)	12.4%	14.1%	15.6%	15.0%
Multilateral Debt Share (%)	34.6%	35.8%	36.5%	37.2%
Bilateral Debt Share (%)	28.3%	27.5%	26.9%	26.3%
Private Creditors Share (%)	37.1%	36.7%	36.6%	36.5%
Eurobond Share (% of total external debt)	17.8%	18.5%	19.2%	19.0%
Average Interest Rate on External Debt (%)	4.9%	5.6%	6.2%	6.0%
Short-term Debt (% of total debt)	12.7%	13.4%	13.8%	13.5%
Debt Distress Risk (% of countries)	54%	57%	58%	56%

Note: Data refer to Africa (latest available estimates, 2022–2025). External debt indicators are derived from IMF World Economic Outlook and World Bank International Debt Statistics (2024). Creditor composition (multilateral, bilateral, and private) is based on World Bank IDS and AfDB datasets, while Eurobond shares reflect market-based financing trends. Debt distress risk follows IMF/World Bank Debt Sustainability Analysis classifications (countries at high risk or in distress). Interest rates represent weighted averages on recent external borrowing.

Source: IMF (2024–2025 updates); World Bank IDS (2024); African Development Bank (2024); UNCTADstat (2024–2025).

The debt data present a nuanced picture consistent with Proposition 2's hypothesis of dependency reproduced under altered financial conditions. While earlier South–South financing—particularly from China—expanded Africa's access to infrastructure funding and diversified its external partnerships, the current structure (2022–2025) reflects a more complex creditor landscape. Multilateral debt has risen steadily (from about 34.6% in 2022 to over 37% projected in 2025), while bilateral shares have declined and private creditors—including Eurobond holders—remain significant. This indicates a shift from state-centric to increasingly market-based financing.

At the same time, aggregate vulnerability indicators have worsened. External debt remains elevated at around 63–65% of GDP, while debt service burdens have increased sharply, exceeding 20% of exports in recent years before a slight projected easing. Interest payments as a share of government revenue have also risen, reflecting tightening global financial conditions and higher borrowing costs, with average interest rates on external debt climbing toward 6% by 2024.

Most critically, the proportion of countries at high risk of debt distress or already in distress has remained persistently high—above 50%—underscoring systemic fragility. These trends suggest that although the sources and instruments of financing

have diversified, the underlying structure of dependency has not been fundamentally transformed. Instead, it has been reconfigured through greater exposure to market volatility, higher borrowing costs, and more complex creditor coordination challenges, particularly in debt restructuring contexts.

Export Product Structure

Table 4 examines Africa's export product composition over the period 2022–2025, the most direct measure of whether structural transformation has accompanied the geographic diversification documented in Table 2.

Table 4. *Africa's Export Product Structure and Diversification — Sub-Saharan Africa, 2022–2025*

Indicator	2022	2023	2024 (Est.)	2025
Primary Commodities (% of total exports)	72.5%	71.8%	70.9%	70.0%
Manufactured Goods (% of total exports)	20.1%	21.0%	21.8%	22.6%
Services Exports (% of total exports)	7.4%	7.2%	7.3%	7.4%
Export Concentration Index (0–1)	0.24	0.23	0.22	0.22
Export Diversification Index (0–1)	0.58	0.57	0.55	0.54
Share of Fuel & Mining Exports (%)	45.6%	44.2%	43.5%	42.8%
Share of Agricultural Raw Materials (%)	26.9%	27.6%	27.4%	27.2%
Share of High-Technology Exports (%)	3.2%	3.5%	3.8%	4.2%
Intra-African Manufactured Exports (%)	16.5%	17.8%	18.9%	20.2%

Note: Export concentration and diversification indices are derived from UNCTADstat data (2024–2025 updates), based on product-level trade classifications broadly consistent with HS/SITC groupings and normalised to a 0–1 scale. Primary commodities include fuels, mining products, and agricultural raw materials, while manufactured goods cover processed and semi-processed industrial products. High-technology exports are defined following UNCTAD classifications. Intra-African trade shares reflect regional export flows under AfCFTA dynamics. Regional groupings (where applicable) follow standard UN classifications of African subregions.

Source: UNCTADstat Database (2024–2025); UNCTAD, *Economic Development in Africa Report (2024)*; authors' calculations.

The export product data confirm the more sobering dimension of Proposition 1: despite some gradual improvements, Africa's export structure remains heavily commodity-dependent. Export concentration has declined only modestly in recent years, with the concentration index falling slightly from around 0.24 in 2022 to approximately 0.22 by 2024–2025, indicating limited diversification gains. At the same time, primary commodities continue to dominate, accounting for roughly 70–73 percent of total exports, with only a gradual decline projected.

Manufactured exports have increased modestly—from about 20 percent in 2022 to over 22 percent by 2025—suggesting incremental structural change, but not a transformative shift. High-technology exports remain marginal, though slowly rising, underscoring persistent constraints in moving up the value chain.

These aggregate patterns mask important variation across countries and subregions. While some economies—particularly in parts of East and Southern Africa—have achieved incremental diversification through manufacturing expansion and intra-African trade growth, others remain highly concentrated in a narrow range of commodity exports. This uneven performance reinforces the broader analytical claim: diversification is not driven simply by external partnerships or market access, but by domestic structural factors, including industrial policy, institutional capacity, and export-oriented development strategies.

Generally, the evidence suggests that while Africa’s export profile is gradually evolving, the pace of transformation remains slow, and the underlying structure of commodity dependence persists, albeit in a slightly moderated form.

AfCFTA Implementation Progress

Table 5 tracks quantitative indicators of AfCFTA implementation progress, providing systematic evidence for Proposition 3's claim about the agreement's potential and limitations.

Table 5. *AfCFTA Implementation Progress Indicators, 2019-2023*

Implementation Indicator	2019 (Entry into force)	2021 (Trading commenced)	2022	2023 Assessment
Signatories (of 55 AU members)	54	54	54	54
Ratifications (required: 22)	22 (threshold met)	36	43	44
Tariff schedules submitted	14 (25%)	31 (57%)	39 (72%)	42 (78%)
Rules of Origin schedules submitted	8	24	33	37
NTB notification portal active	No	Yes	Yes	Yes
NTBs formally notified	0	112	287	401
Intra-African trade (% total, estimate)	14.2	15.3	16.1	16.8
Services protocol signed	No	No	Yes	Yes (5 sectors)
Digital trade annex status	No	No	Negotiating	Draft complete
Dispute settlement body operational	No	No	Partially	Operational

Note: Signatory and ratification counts from the African Union Commission. Tariff schedule and Rules of Origin data from AfCFTA Secretariat (2023). NTB notifications from the AfCFTA NTB Monitoring and Elimination Mechanism portal. Intra-African trade share from UNCTAD (2023). Services protocol status from AU Commission legal documents. Sources: African Union Commission (2023); AfCFTA Secretariat (2023); UNCTAD (2023).

The AfCFTA data reveal both genuine institutional progress and significant implementation gaps that directly inform Proposition 3. On the positive side, the agreement achieved a remarkable degree of political commitment: 54 of 55 African Union members signed, 44 had ratified by 2023, and tariff schedule submissions reached 78 percent of members. The NTB notification portal, operational from 2021, generated 401 notifications by 2023, creating a transparency mechanism that previously did not exist. The services protocol was signed in 2022, extending the agreement beyond goods trade into the higher-value sectors where Africa's comparative advantage is expanding.

However, implementation gaps are substantial. The most significant is the exclusion of sensitive sectors from core tariff reduction schedules: most members have submitted schedules that meet the required 90 percent tariff line coverage but have concentrated their exclusions in precisely the manufactured goods sectors — textiles, food processing, light manufacturing — where intra-African trade has the greatest potential to support structural transformation. The intra-African trade share's modest increase from 14.2 percent (2019) to 16.8 percent (2023) shows directional movement but falls far short of comparable regional trading blocs: ASEAN's intra-regional trade share is approximately 60 percent, the EU's approximately 65 percent. The World Bank (2020) estimates that AfCFTA could increase intra-African trade by 81 percent by 2035 under full implementation — an estimate that the current implementation trajectory suggests is optimistic.

Cross-Domain Causal Mechanism Analysis

Table 6 presents the cross-domain causal mechanism analysis, mapping evidence for and against negotiated repositioning across the four domains and evaluating each of the five propositions against the assembled empirical record.

Table 6. *Cross-Domain Causal Mechanism Analysis — Evidence for Negotiated Repositioning*

Mechanism	Evidence for Repositioning	Evidence for Continued Dependency	Net Assessment	Proposition Supported
Trade partner diversification	Partner HHI fell from 0.21 to 0.13 (2000-2022); China share rose from 4% to 20%; intra-African trade rose from 8% to 16%	EU + US still ~26% of exports; commodity composition unchanged; China largely imports raw materials	Genuine diversification of partners but not of product structure; repositioning without structural transformation	P1 (partial): partner diversification confirmed; P3 challenged: commodity dependence persists
Chinese loan financing	African states negotiated 50+ BRI infrastructure projects; avg. Chinese rate	Chinese share of SSA debt rose from 1.4% to 20% (2005-2020); avg. interest rates	New financing source real but dependency reproduced on new terms; debt distress risk at	P2 confirmed: new partnerships reshape but do not eliminate dependency; P4 partial:

	(2.3-4.4%) below commercial rates (6-8%)	increased post-2015; Angola, Zambia, Ethiopia entered distress	42% of countries by 2022	triangulation increases options but not always outcomes
Regional integration (AfCFTA)	Tariff schedule submissions reached 78% by 2023; NTB portal generated 401 notifications; intra-African trade edged up to 16.8%	Core schedules exclude sensitive sectors; implementation fragmented; intra-African trade share still far below ASEAN (60%) or EU (65%)	Institutional foundation established; transformation-in-progress with significant implementation gap	P5 confirmed: collective agency mechanism exists; P3 challenged: structural commodity dependence limits AfCFTA impact
Export product diversification	East Africa HHI improved from 0.31 to 0.19; manufacturing exports share rose modestly (10.4% to 13.4%)	SSA average primary commodity share still 72%; oil exporters above 87%; no region achieved structural break from commodity dependence	Marginal diversification at continental level; significant sub-regional variation; East Africa outperforms	P3 confirmed: commodity dependence persists; P1 partially supported: governance-strong states achieve more diversification
Institutional capacity and agency	WGI Government Effectiveness improved marginally in 18 of 49 SSA countries 2005-2022; Rwanda, Botswana, Mauritius show strong gains	Average SSA WGI Govt. Effectiveness at 22nd percentile (2022); 31 countries declined or stagnant; capacity heterogeneity extreme	Agency capacity highly uneven; strongest exercisers of strategic agency cluster in East/Southern Africa with better governance scores	P4 confirmed: agency is differentiated, not uniform; institutional capacity is binding constraint on effective repositioning

Note: P1-P5 refer to the five Analytical Propositions stated in Section 3.4. Assessment draws on Tables 2-5 and the process tracing evidence in Section 5. 'Partial' support indicates that the proposition is confirmed for some dimensions or country groups but not universally.

The cross-domain analysis yields three overarching findings that collectively support the concept of negotiated repositioning. First, partner diversification is genuine and empirically confirmed (Proposition 1, first component), but product diversification lags significantly (Proposition 1, second component). This asymmetry — between where Africa sells and what it sells — is the central structural finding of the study. It means that Africa has diversified its options without yet transforming its productive structure, a distinction that dependency theory predicts will limit the developmental impact of partner diversification and that the poverty and distribution data for commodity-dependent African states confirm.

Second, new South-South partnerships have reshaped rather than replaced dependency (Proposition 2). The increase in Chinese debt's share of total SSA debt from 1.4 to 20.4 percent over seventeen years, combined with the rise in high debt distress risk from 11 to 42 percent of countries, provides systematic evidence that the Carmody (2011) triangulation hypothesis holds for some countries in some periods but that the aggregate picture is one of new forms of financial vulnerability replacing old ones. The specific cases where triangulation appears to have strengthened bargaining power — Angola in 2004-2008, Ethiopia in 2010-2018 — are precisely those where institutional capacity was sufficient to structure deals with explicit resource collateralisation or infrastructure linkage requirements that created genuine leverage.

Third, institutional capacity is the binding constraint on effective agency (Proposition 4). The sub-regional variation in export diversification — East Africa's HHI improvement from 0.31 to 0.19 versus West Africa's from 0.61 to 0.55 — cannot be explained by resource endowments alone: both sub-regions contain resource-rich and resource-scarce economies. The differentiating factor is governance quality: the East African countries that achieved the greatest structural diversification (Kenya, Rwanda, Mauritius) consistently rank in the top quartile of African WGI scores, while West African commodity-dependent economies cluster in the bottom quartile. This finding directly challenges undifferentiated accounts of African agency, whether optimistic or pessimistic: the continent is neither uniformly dependent nor uniformly repositioning, but is experiencing a process whose outcomes are strongly conditioned by domestic institutional capacity.

Discussion: Evaluating Negotiated Repositioning

What the Evidence Shows

The empirical findings—drawing on recent data from UNCTAD, IMF, World Bank, and AfDB (2022–2025)—allow for a more precise characterisation of Africa's position in the global political economy than the traditional dependency-versus-autonomy binary suggests. The evidence indicates that Africa is neither structurally fixed in the classical dependency position described by Wallerstein (1974), nor fully transitioning into the autonomous growth trajectory implied by earlier “Africa rising” narratives. Rather, the pattern that emerges is best understood as one of negotiated repositioning. This is reflected in measurable, though incomplete, shifts: moderate diversification of trade partners without equivalent transformation in export structure; persistent commodity dependence, with primary goods still accounting for roughly 70 percent of exports; evolving financial relationships marked by a shift toward multilateral and market-based borrowing alongside sustained debt vulnerabilities; and the gradual consolidation of institutional frameworks such as the AfCFTA, whose transformative potential remains unevenly realised.

Crucially, the evidence also highlights significant cross-country variation. The ability to leverage these changing global dynamics depends less on external opportunities alone than on domestic institutional capacity, industrial policy coherence, and governance quality. As such, Africa's global position is neither static nor uniformly improving,

but dynamically negotiated—characterised by partial gains, structural continuities, and uneven developmental trajectories across states.

The taxation of this finding against the five propositions is broadly consistent. Propositions 1 and 2 receive mixed support in the specific direction theoretically predicted: partner diversification is confirmed, product diversification is not; new partnerships provide leverage for some states in some periods but aggregate to renewed financial vulnerability. Proposition 3 receives qualified support: AfCFTA's institutional progress is genuine but its developmental impact is as yet unmeasured and its implementation gaps are significant. Proposition 4 receives the strongest support across all domains: institutional capacity consistently discriminates between states that effectively leverage global transformation and those that do not. Proposition 5 — the overarching negotiated repositioning thesis — is supported by the combined evidence of real agency in some domains and real structural constraint in others, with outcomes contingent on institutional capacity rather than predetermined by structural position.

The Product-Partner Asymmetry: Structural Constraint at the Core

The most analytically significant finding for the 2022–2025 period is the continued divergence between partner diversification (clearly expanding, as shown in Table 2) and product diversification (remaining limited, as reflected in Table 4). This asymmetry highlights the central constraint on Africa's economic transformation: while the range of external partners has widened in the post-pandemic and post-commodity shock recovery phase, the structure of production and exports has changed only marginally.

Between 2022 and 2025, African economies deepened engagement with a broader set of actors—including emerging economies, Gulf states, and intra-African trade frameworks under AfCFTA. However, this expansion has largely reinforced existing trade patterns rather than altering them. Primary commodities—particularly oil, minerals, and agricultural raw materials—continue to dominate export profiles, indicating that diversification has occurred primarily along the *geographic axis* rather than the *productive axis*. In this sense, new partnerships have not translated into movement up global value chains.

This pattern is especially evident in the post-2022 commodity cycle. The recovery in African growth following the COVID-19 disruption and the 2022 global supply shocks was again closely tied to elevated commodity prices, particularly in energy and critical minerals. As prices stabilized and, in some cases, softened into 2024–2025, growth trajectories similarly moderated. This reinforces the conclusion that recent economic performance remains externally driven. As the limited changes in export composition in Table 4 suggest, the underlying productive structure has not undergone the kind of transformation necessary for sustained, autonomous growth.

AfCFTA as Collective Agency: Promise and Constraint

The AfCFTA evidence (Table 5) represents the most genuinely novel aspect of Africa's contemporary global engagement. No previous generation of African regional integration — not the ECOWAS protocols, not SADC, not COMESA — achieved a continent-wide framework with 54 signatories, an operational secretariat, and an

active implementation monitoring mechanism. The NTB portal's 401 notifications represent a form of institutional transparency that creates accountability for non-tariff protectionism that did not previously exist. The services protocol represents a recognition that Africa's comparative advantage is shifting toward higher-value activities in finance, logistics, and digital services — precisely the sectors where East African states are achieving structural diversification.

However, the comparison with more advanced regional trading blocs is sobering. ASEAN's intra-regional trade share of approximately 60 percent, compared to Africa's 16.8 percent, reflects decades of supply chain integration, infrastructure connectivity, and policy harmonisation that AfCFTA has barely begun to replicate. The critical implementation gap is in rules of origin: most submitted tariff schedules use sufficiently strict rules of origin that much of the manufactured goods trade that could benefit from AfCFTA preferences does not qualify, because African manufacturers depend on imported intermediates that fail local content thresholds. This is not merely a technical problem; it reflects the absence of upstream industrial development that only a deliberate and sustained industrial policy strategy — of the kind pursued in East Asian developmental states and now in some East African economies — can address.

The Differentiated Nature of Agency

The sub-regional variation documented throughout the empirical analysis supports Proposition 4's claim that agency within Africa's global engagement is not uniformly distributed but is strongly conditioned by institutional capacity. Rwanda's transformation from conflict-affected subsistence economy to East Africa's governance benchmark and services hub; Kenya's development of a fintech sector that processed transactions equivalent to 50 percent of GDP annually by 2022; Mauritius's position as Sub-Saharan Africa's highest-scoring state on the Mo Ibrahim Index and its transformation into a financial services centre — these are genuine achievements of strategic agency that require explanation beyond structural position.

What they share is not resource wealth, geographic advantage, or historical legacy — Kenya and Rwanda both endured devastating political violence in the 1990s and 2000s — but deliberate institutional investment, coherent industrial policy, and leadership commitment to productive economic transformation over patronage-driven distributional politics. This finding is consistent with Evans's (1995) embedded autonomy thesis: the capacity for developmental state agency requires both institutional coherence (the bureaucratic independence and effectiveness that prevents capture) and social embeddedness (the links between state and productive sector actors that enable coordinated industrial strategy). The states that have achieved the most effective negotiated repositioning are those that have most closely approximated this configuration — not without contestation, not without setbacks, but consistently enough to achieve measurable structural change.

Conclusion

This study began with a specific empirical question: do the observable changes in Africa's global engagement—diversified trade partners, expanding South–South financial relationships, AfCFTA implementation, and a widening diplomatic footprint—represent genuine movement beyond structural dependency, or a reconfiguration of dependency under altered conditions? Evidence drawn from the 2022–2025 period allows a more precise answer than either linear dependency or optimistic autonomy narratives suggest.

The findings confirm four core propositions. First, trade partner diversification has continued to deepen, with declining concentration indicating a broader range of external economic relationships. Second, product diversification has remained limited: export structures are still dominated by primary commodities, and the modest shifts observed do not indicate movement into higher-value production. This confirms the persistence of structural commodity dependence despite expanded global engagement. Third, South–South financing—particularly from China and other emerging partners—has widened fiscal options but also contributed to rising debt vulnerabilities, with a growing number of African states facing elevated distress risk. This demonstrates that financial dependency is being reshaped rather than eliminated. Fourth, AfCFTA has advanced institutionally, with increasing tariff schedule submissions and operational mechanisms, yet intra-African trade remains comparatively low, underscoring that institutional frameworks exist but transformative impact is still emerging. Across all domains, institutional capacity continues to differentiate outcomes, with some states leveraging new opportunities more effectively than others.

Taken together, these findings support the concept of negotiated repositioning. Africa's trajectory is best understood as the exercise of strategic agency within persistent structural constraints, producing outcomes that are neither a linear transition to autonomy nor a simple reproduction of dependency. Instead, they reflect contingent processes shaped by institutional strength, policy coordination, and the evolving configuration of global partnerships.

Three policy implications follow. First, the persistence of the product–partner asymmetry in the 2022–2025 period indicates that diversification of partners alone is insufficient; the binding constraint remains productive transformation. Without deliberate industrial policy and capability development, expanded trade networks will continue to reproduce low-value export structures. Second, the evolution of debt vulnerability highlights the need for stronger institutional frameworks for evaluating financing terms, ensuring transparency, and managing risk across increasingly complex creditor landscapes. Third, the AfCFTA implementation gap suggests that its developmental potential will depend on deepening rules-of-origin reforms, promoting intra-African value chains, and advancing services liberalization in sectors where competitive advantages are emerging.

Future research should prioritise three areas. First, micro-level analysis of financing agreements—including collateralisation, technology transfer, and local content provisions—is essential for understanding how external partnerships shape domestic development trajectories. Second, AfCFTA's long-term impact requires longitudinal assessment as implementation deepens beyond the current early-stage window. Third,

subnational analysis within African economies is necessary to determine whether emerging patterns of engagement are generating broad-based development or reinforcing uneven, enclave-based growth.

The 2022–2025 evidence reinforces a central conclusion: Africa's global integration is expanding, but its structural transformation remains incomplete. The challenge is no longer access to partners, but the conversion of that access into sustained productive change.

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