

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

This article 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 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

1 Area (AfCFTA), which commenced trading in 2021 with 54 signatories, signals
2 a growing institutional commitment to self-directed economic integration. These
3 developments suggest that Africa's global engagement is being qualitatively
4 transformed — but transformed in what direction, and to whose benefit?

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

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

30 **Literature Review**

32 *Classical Dependency and World-Systems Perspectives*

34 Dependency theory and world-systems analysis have long provided the
35 dominant frameworks for interpreting Africa's position in the global political
36 economy. Amin (1976) argued that underdevelopment in the Global South was
37 not a precursor to development but a condition actively produced by the
38 historical expansion of capitalism. African economies were structurally
39 integrated into global markets in subordinate roles — exporting primary
40 commodities and depending on external capital and technology — in a manner
41 that systematically prevented capital accumulation and industrial development.
42 Wallerstein's (1974) world-systems theory formalised this argument by
43 conceptualising the global economy as a hierarchical division of labour between
44 core, semi-periphery, and periphery, with Africa consistently located at the
45 periphery where economic activities are determined by external demand and
46 unequal exchange.

1 These frameworks generate specific empirical predictions that can be
2 evaluated: if dependency theory is correct, we would expect Africa's export
3 composition to remain dominated by primary commodities over time; its trade
4 partners to maintain leverage through technological and financial superiority;
5 and new partnerships to reproduce rather than replace structural subordination.
6 Empirical evidence reviewed in this article partially confirms and partially
7 challenges these predictions, and doing so at a systematic level — rather than
8 through illustrative cases — is one of the primary methodological objectives of
9 this study. However, as Bayart (2000) and others have argued, dependency
10 frameworks contain a fundamental limitation: their structural determinism
11 prevents them from accounting for variation in how different African states
12 navigate similar external constraints, variation that is empirically observable and
13 theoretically significant.

14 15 *Post-Dependency Approaches and African Agency*

16
17 A growing body of scholarship has sought to foreground African agency in
18 global affairs. Bayart's (2000) concept of extraversion highlights how African
19 elites historically leveraged external relationships to consolidate domestic power
20 and secure resources, actively mediating rather than passively receiving external
21 influence. Carmody (2011) argues that the competitive engagement of multiple
22 external powers on the continent has created spaces for African states to engage
23 in strategic triangulation — balancing relationships with China, Western donors,
24 and emerging powers to maximise bargaining power. Taylor (2016) documents
25 how individual African governments have exploited the China option to
26 renegotiate terms with International Monetary Fund programmes, with evidence
27 from Angola, Nigeria, and Ethiopia suggesting that Chinese financing was
28 deployed as leverage against conditional Western lending.

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

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1 *Global Transformation and Multipolarity*

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3 The structural context within which African agency operates has been
4 reshaped by the transition from a unipolar to a multipolar global order. Arrighi
5 (2007) argues that the rise of East Asian economies, particularly China,
6 represents a fundamental reorganisation of the global accumulation cycle that
7 creates opportunities for peripheral regions to engage with multiple centres of
8 capital. Keohane and Nye's (1977) framework of asymmetrical interdependence
9 is particularly analytically useful: it holds that even in relationships characterised
10 by large power differentials, weaker parties are not powerless — they can
11 leverage their position within networks of interdependence to extract benefits,
12 negotiate terms, and influence outcomes. The key empirical question is whether
13 the asymmetry of interdependence has actually diminished, which requires
14 measurement of the terms on which African states engage rather than simply the
15 diversity of their partnerships.

16 Critical geopolitics perspectives (Ó Tuathail, 1996; Mbembe, 2001) add an
17 ideational dimension to this analysis by examining how Africa's global position
18 is constructed and contested through discourse. The 'Africa rising' narrative that
19 emerged around 2010 — driven partly by commodity price booms, partly by
20 genuine improvements in economic and governance indicators in several
21 countries, and partly by external actors' strategic interests in portraying Africa
22 as an investment destination — illustrates how material and discursive changes
23 interact. That the narrative faltered after commodity prices declined in 2014-
24 2016, without the structural economic transformation that would have sustained
25 it, is itself empirically informative: discursive repositioning without material
26 structural change is reversible.

27 *Research gap and Article's contribution*

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

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1 **Theoretical Framework and Analytical Propositions**

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

9 10 *Structural Constraints: The Dependency Foundation*

11
12 Dependency theory's foundational insight — that peripheral economies are
13 structurally embedded in global capitalism in subordinate roles that reproduce
14 underdevelopment — provides the necessary starting point for analysing Africa's
15 position. Amin's (1976, 1990) argument that structural inequalities in global
16 trade, finance, and technology create self-reproducing constraints on peripheral
17 development generates specific empirical predictions: primary commodity
18 dependence should persist; financial flows from new partnerships should
19 reproduce rather than resolve balance-of-payments vulnerabilities; and the terms
20 of engagement should reflect power asymmetries rather than equal bargaining.
21 These predictions are evaluable against the data assembled in Section 5.

22 23 *Agency within Asymmetrical Interdependence*

24
25 Keohane and Nye's (1977) asymmetrical interdependence framework
26 generates the counter-prediction: even in relationships with large power
27 differentials, weaker parties can leverage their position within interdependence
28 networks to extract benefits and influence outcomes. Applied to Africa's
29 engagement with China and emerging powers, this predicts that African states
30 with greater institutional capacity should achieve better terms — lower interest
31 rates, higher local content requirements, more infrastructure projects with
32 genuine technology transfer — than states with weaker capacity. Carmody's
33 (2011) triangulation hypothesis adds a corollary: states that balance multiple
34 competing partners should achieve better terms than states dependent on a single
35 external partner, because competition among external actors strengthens the
36 African side's bargaining position.

37 38 *Critical Geopolitics: Discourse and Material Change*

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40 Critical geopolitics emphasises that Africa's global position is shaped not
41 only by material factors but by how the continent is represented in global
42 discourse. Mbembe (2001) and Ó Tuathail (1996) argue that representations of
43 Africa as crisis-ridden and peripheral have legitimised external intervention and
44 marginalised African voices in global governance. The 'Africa rising' narrative
45 represents a discursive shift with material implications — it attracted investment
46 and diplomatic attention — but critical geopolitics cautions that discursive

1 change without structural material change is fragile and potentially serves
 2 external interests in accessing African markets and resources rather than
 3 genuinely reflecting African developmental transformation.

4 *Analytical Propositions*

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

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

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

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

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

35 36 37 **Research Design and Methodology**

38 39 *Research Design*

40
 41 This study employs a structured qualitative comparative design (SQCD)
 42 combined with domain-specific quantitative indicator analysis. The SQCD
 43 approach (George and Bennett, 2005; Mahoney and Thelen, 2010) is appropriate
 44 when causal relationships are complex, when mechanisms matter as much as
 45 correlations, and when the number of cases or domains is small enough to permit
 46 detailed analysis but large enough to support comparative inference. Rather than

1 a single case study, the analysis examines four analytically distinct domains of
2 Africa's global engagement — trade partner diversification, South-South
3 financial partnerships, regional integration, and export product structure —
4 treating each domain as a 'case' in the comparative design while drawing on
5 cross-domain patterns to evaluate the overarching propositions.

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

15 16 *Multi-Scalar Analytical Approach*

17
18 The study adopts a deliberately multi-scalar perspective, examining
19 processes at the continental, sub-regional, and country levels where data permit.
20 Continental aggregates are used for propositions about overall structural
21 position; sub-regional disaggregation (East Africa, West Africa, Southern
22 Africa) is used to examine variation in export diversification trajectories; and
23 country-level examples are used to trace causal mechanisms identified in the
24 aggregate data. This multi-scalar approach is essential for avoiding the
25 continental homogenisation that characterises much existing literature: the
26 empirical evidence shows marked sub-regional and country-level variation that
27 a single aggregate analysis would obscure. The finding that East Africa's average
28 export HHI improved from 0.31 to 0.19 between 2000 and 2022, while West
29 Africa's improved only from 0.61 to 0.55, is precisely the kind of variation that
30 requires explanation and that single-level analysis cannot provide.

31 32 *Data Sources and Operationalisation*

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

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1 **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

2 *Note: UNCTAD BACI = Bureau of Analysis and Intelligence database for trade flow data at HS*
3 *product level. AidData TUFF = Tracking Underreported Financial Flows dataset (AidData,*
4 *2021). WGI = World Bank Worldwide Governance Indicators. IDS = International Debt*
5 *Statistics. CPIA = Country Policy and Institutional Assessment. HHI = Hirschman-Herfindahl*
6 *Index. DSAs = Debt Sustainability Analyses.*
7

1 The export product concentration index is operationalised as the standard
2 Hirschman-Herfindahl Index applied to export values disaggregated at HS4
3 product level: values approaching 1 indicate extreme product concentration,
4 values approaching 0 indicate maximum diversification. The trade partner
5 concentration index is the analogous HHI applied to export destination shares,
6 enabling comparison of partner versus product diversification. The distinction
7 between these two indicators is theoretically central: it permits empirical
8 separation of partner diversification (who Africa trades with) from structural
9 diversification (what Africa produces and exports), which the propositions treat
10 as distinct and potentially divergent processes.

11

12 *Scope Conditions and Limitations*

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

26

27

28 **Quantitative Evidence**

29

30 *Trade Partner Diversification*

31

32 Table 2 presents Africa's export and import partner shares from 2000 to
33 2022, drawn from UNCTAD trade flow statistics. The data reveal a structural
34 transformation in the geography of Africa's trade that is empirically substantial
35 and consistent across time periods.

36

37

1 **Table 2.** *Africa's Trade Partner Diversification — Export and Import Shares by*
 2 *Partner (%), 2000-2022*

Trade Partner	2000 Exports %	2005 Exports %	2010 Exports %	2015 Exports %	2020 Exports %	2022 Exports %	2000 Imports %	2022 Imports %
European Union	36.2	33.7	28.4	24.1	20.3	19.8	38.6	26.4
United States	18.3	16.1	12.9	8.4	5.7	6.1	12.4	7.2
China	3.7	7.2	13.4	17.8	18.6	20.4	4.2	21.3
India	2.9	3.8	5.3	6.7	6.4	7.1	4.6	8.4
Gulf States (UAE/Saudi)	1.8	2.4	3.1	4.2	5.1	6.3	3.7	7.6
Turkey	0.4	0.7	1.3	2.1	2.8	3.2	0.8	3.1
Intra-African	8.4	9.1	10.8	14.2	15.3	16.1	9.2	14.7
Other	28.3	27.0	24.8	22.5	25.8	20.8	26.5	11.3
Partner HHI (exports)	0.21	0.19	0.17	0.15	0.14	0.13	-	-

3 *Note: Figures are percentage shares of total merchandise exports and imports. Partner HHI is*
 4 *the Hirschman-Herfindahl Index of export destination concentration, calculated from UNCTAD*
 5 *BACI bilateral trade data. 'Gulf States' comprises UAE, Saudi Arabia, and Qatar combined.*
 6 *Data for 2022 include preliminary estimates. Source: UNCTAD (2023); authors' calculations*
 7 *from BACI data.*

8
 9 The partner concentration data provide unambiguous support for the first
 10 component of Proposition 1: Africa's trade partner HHI fell from 0.21 in 2000 to
 11 0.13 in 2022, a decline of nearly 40 percent, reflecting genuine diversification of
 12 export destinations. The European Union's share of African exports fell from
 13 36.2 to 19.8 percent, the United States' share fell from 18.3 to 6.1 percent, while
 14 China's share rose from 3.7 to 20.4 percent. Intra-African trade increased from
 15 8.4 to 16.1 percent of total trade — an improvement that AfCFTA is expected to
 16 accelerate but which began well before the agreement entered into force, driven
 17 primarily by Regional Economic Community integration and bilateral
 18 agreements.

19 These figures are significant not merely as descriptive statistics but as
 20 evidence against the fixed-partner model implicit in classical dependency theory,
 21 which assumes that peripheral economies remain locked into relationships with
 22 the same core partners. The data show that over two decades, Africa's principal
 23 trading partner shifted from Europe to China. However, this finding must be
 24 immediately juxtaposed with the export product data in Section 5.3: China's
 25 principal demand from Africa is for raw materials — crude oil, copper, cobalt,
 26 iron ore — not manufactured goods. Partner diversification has not disrupted the

1 commodity-for-manufactured-goods exchange structure that dependency theory
2 identifies as the core mechanism of peripheral integration.

3
4 *Debt Structure and Financial Dependency*

5
6 Table 3 presents the evolution of Africa's external debt structure between
7 2005 and 2022. These data are essential for evaluating Proposition 2 — whether
8 new South-South financial partnerships have reshaped or reproduced financial
9 dependency.

10
11 **Table 3.** *Africa's External Debt Structure and Sustainability Indicators, 2005-*
12 *2022*

Debt Indicator	2005	2010	2015	2018	2020	2022
Africa external debt / GNI (%)	41.2	25.6	31.4	42.7	55.1	59.3
Chinese loans / total ext. debt (% , SSA)	1.4	5.6	14.2	19.8	21.7	20.4
Multilateral debt / total ext. debt (% , SSA)	52.1	47.3	38.6	34.1	38.3	41.2
Bilateral Western / total ext. debt (%)	28.4	22.1	18.7	15.2	12.8	13.1
Commercial / total ext. debt (%)	11.8	17.4	23.1	27.9	24.6	22.4
Debt service / exports (% , SSA)	9.8	5.4	8.2	13.6	17.1	16.4
Countries at high debt distress risk (%)	11	12	17	25	38	42
Chinese loan avg. interest rate (%)	2.3	2.1	2.5	3.8	4.1	4.4
World Bank IDA avg. interest rate (%)	0.8	0.8	1.0	1.3	1.4	1.6

13 *Note: Data primarily for Sub-Saharan Africa. External debt/GNI from World Bank IDS. Chinese*
14 *loan shares from AidData TUFF dataset (AidData, 2021) cross-referenced with World Bank*
15 *IDS bilateral creditor data. Debt distress risk from IMF/World Bank Debt Sustainability*
16 *Analysis classifications (high risk or in distress). Average interest rates are weighted means for*
17 *new commitments. Source: World Bank IDS (2023); AidData (2021); IMF (2023).*

18
19 The debt data present a nuanced picture consistent with Proposition 2's
20 hypothesis of dependency reproduced at altered terms. Chinese debt grew from
21 1.4 percent of Sub-Saharan Africa's total external debt in 2005 to a peak of 21.7
22 percent in 2020, before declining marginally to 20.4 percent in 2022. This
23 expansion provided African states with significant new financing, particularly

1 for infrastructure — the AidData TUFF dataset documents over USD 170 billion
 2 in Chinese development finance to Africa between 2000 and 2017 — and
 3 demonstrably increased the bargaining options available to some governments.
 4 Angola's use of Chinese oil-backed loans to avoid IMF conditionality in the mid-
 5 2000s, and Ethiopia's use of Chinese infrastructure financing to accelerate its
 6 industrial parks programme, are well-documented cases of strategic leverage of
 7 the China option.

8 However, the aggregate debt trajectory tells a more concerning story.
 9 Africa's external debt as a share of GNI rose from 41.2 percent in 2005 to 59.3
 10 percent in 2022. The share of countries classified by the IMF and World Bank
 11 as at high debt distress risk or already in debt distress rose from 11 percent in
 12 2005 to 42 percent in 2022. The average interest rate on Chinese loans increased
 13 from 2.3 percent in 2005 to 4.4 percent in 2022 — still below commercial rates
 14 but significantly above the World Bank IDA rate of 1.6 percent — and the shift
 15 in Chinese lending from largely state-owned enterprise loans toward more
 16 commercially oriented financing has worsened terms for many borrowers.
 17 Zambia's 2020 Eurobond default, involving USD 17 billion in external debt of
 18 which Chinese creditors held approximately 30 percent, and the subsequent
 19 protracted debt restructuring that AidData's (2021) analysis attributes partly to
 20 opaque collateralisation clauses in Chinese loan contracts, illustrates the
 21 downside of new partnership dependency.

22 *Export Product Structure*

23
 24
 25 Table 4 examines Africa's export product composition over the period 2000-
 26 2022, the most direct measure of whether structural transformation has
 27 accompanied the geographic diversification documented in Table 2.

28
 29 **Table 4.** *Africa's Export Product Structure and Diversification — Sub-Saharan*
 30 *Africa, 2000-2022*

Indicator / Country Group	2000	2005	2010	2015	2020	2022
SSA export product HHI (average)	0.44	0.47	0.48	0.43	0.41	0.39
Primary commodities / total exports, SSA (%)	74.1	76.8	76.2	72.6	70.3	71.8
Manufacturing exports / total exports, SSA (%)	10.4	9.7	10.1	11.3	12.6	13.4
Services exports / total exports, SSA (%)	15.5	13.5	13.7	16.1	17.1	14.8
Oil exporters: primary / total exports (%)	88.2	91.4	90.7	87.3	84.9	87.1
Diversified economies: primary / total (%)	61.3	59.4	58.2	54.1	51.3	50.4

East Africa avg. export HHI	0.31	0.28	0.26	0.23	0.21	0.19
West Africa avg. export HHI	0.61	0.64	0.65	0.60	0.57	0.55
Southern Africa avg. export HHI	0.38	0.36	0.35	0.33	0.31	0.30

1 *Note: Export product HHI calculated from UNCTAD BACI data at HS4 level, normalised to 0-*
2 *1 range. Primary commodities comprise SITC sections 0-4 and 68. Manufacturing comprises*
3 *SITC sections 5-8 excluding 68. East Africa comprises Kenya, Ethiopia, Tanzania, Uganda,*
4 *Rwanda. West Africa comprises Nigeria, Ghana, Senegal, Cote d'Ivoire, Mali. Southern Africa*
5 *comprises South Africa, Botswana, Zambia, Zimbabwe. Source: UNCTAD BACI (2023);*
6 *authors' calculations.*
7

8 The export product data confirm the second, more sobering component of
9 Proposition 1: despite the partner diversification documented in Table 2, Sub-
10 Saharan Africa's average export product HHI improved only marginally from
11 0.44 in 2000 to 0.39 in 2022, and primary commodities still accounted for
12 approximately 72 percent of total SSA exports in 2022 — a structural position
13 essentially unchanged from 2000. For oil-exporting states, primary commodities'
14 share of exports actually increased during commodity price booms (to 91.4
15 percent in 2005) before settling back to 87.1 percent in 2022. Manufacturing's
16 share rose modestly from 10.4 to 13.4 percent, a genuine if limited improvement,
17 with gains concentrated in East and Southern Africa.

18 The sub-regional disaggregation reveals the significant variation that
19 continental aggregates conceal. East Africa improved its average export HHI
20 from 0.31 to 0.19 — a substantial structural shift reflecting Kenya's
21 diversification into services, horticulture, and technology, Ethiopia's industrial
22 parks-driven manufactured export growth, and Rwanda's financial and logistics
23 services development. West Africa's improvement was far more limited (0.61 to
24 0.55), constrained by Nigeria's continued oil dependence (which accounts for
25 approximately 80-85 percent of Nigeria's merchandise exports throughout the
26 period). This sub-regional variation directly supports Proposition 4: the states
27 that achieved meaningful structural diversification are those with stronger
28 governance frameworks and more active industrial policy — East African
29 countries with above-median WGI scores — rather than the most resource-rich
30 or the largest economies.

31 *AfCFTA Implementation Progress*

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34 Table 5 tracks quantitative indicators of AfCFTA implementation progress,
35 providing systematic evidence for Proposition 3's claim about the agreement's
36 potential and limitations.
37

1 **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

2 *Note: Signatory and ratification counts from the African Union Commission. Tariff schedule and*
3 *Rules of Origin data from AfCFTA Secretariat (2023). NTB notifications from the AfCFTA NTB*
4 *Monitoring and Elimination Mechanism portal. Intra-African trade share from UNCTAD*
5 *(2023). Services protocol status from AU Commission legal documents. Sources: African Union*
6 *Commission (2023); AfCFTA Secretariat (2023); UNCTAD (2023).*

7
8 The AfCFTA data reveal both genuine institutional progress and significant
9 implementation gaps that directly inform Proposition 3. On the positive side, the
10 agreement achieved a remarkable degree of political commitment: 54 of 55
11 African Union members signed, 44 had ratified by 2023, and tariff schedule
12 submissions reached 78 percent of members. The NTB notification portal,
13 operational from 2021, generated 401 notifications by 2023, creating a
14 transparency mechanism that previously did not exist. The services protocol
15 was signed in 2022, extending the agreement beyond goods trade into the higher-
16 value sectors where Africa's comparative advantage is expanding.

17 However, implementation gaps are substantial. The most significant is the
18 exclusion of sensitive sectors from core tariff reduction schedules: most
19 members have submitted schedules that meet the required 90 percent tariff line
20 coverage but have concentrated their exclusions in precisely the manufactured
21 goods sectors — textiles, food processing, light manufacturing — where intra-
22 African trade has the greatest potential to support structural transformation. The

1 intra-African trade share's modest increase from 14.2 percent (2019) to 16.8
 2 percent (2023) shows directional movement but falls far short of comparable
 3 regional trading blocs: ASEAN's intra-regional trade share is approximately 60
 4 percent, the EU's approximately 65 percent. The World Bank (2020) estimates
 5 that AfCFTA could increase intra-African trade by 81 percent by 2035 under full
 6 implementation — an estimate that the current implementation trajectory
 7 suggests is optimistic.

10 Cross-domain Causal Mechanism Analysis

11
 12 Table 6 presents the cross-domain causal mechanism analysis, mapping
 13 evidence for and against negotiated repositioning across the four domains and
 14 evaluating each of the five propositions against the assembled empirical record.

15
 16 **Table 6.** *Cross-Domain Causal Mechanism Analysis — Evidence for Negotiated*
 17 *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 (2.3-4.4%) below commercial rates (6-8%)	Chinese share of SSA debt rose from 1.4% to 20% (2005-2020); avg. interest rates increased post-2015; Angola, Zambia, Ethiopia entered distress	New financing source real but dependency reproduced on new terms; debt distress risk at 42% of countries by 2022	P2 confirmed: new partnerships reshape but do not eliminate dependency; P4 partial: triangulation increases options but not always outcomes
Regional integration (AfCFTA)	Tariff schedule submissions reached 78% by 2023; NTB portal generated 401 notifications; intra-African	Core schedules exclude sensitive sectors; implementation fragmented; intra-African trade share still far below	Institutional foundation established; transformation-in-progress with significant implementation gap	P5 confirmed: collective agency mechanism exists; P3 challenged: structural commodity dependence

	trade edged up to 16.8%	ASEAN (60%) or EU (65%)		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

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

4
5 The cross-domain analysis yields three overarching findings that
6 collectively support the concept of negotiated repositioning. First, partner
7 diversification is genuine and empirically confirmed (Proposition 1, first
8 component), but product diversification lags significantly (Proposition 1, second
9 component). This asymmetry — between where Africa sells and what it sells —
10 is the central structural finding of the study. It means that Africa has diversified
11 its options without yet transforming its productive structure, a distinction that
12 dependency theory predicts will limit the developmental impact of partner
13 diversification and that the poverty and distribution data for commodity-
14 dependent African states confirm.

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

1 sufficient to structure deals with explicit resource collateralisation or
2 infrastructure linkage requirements that created genuine leverage.

3 Third, institutional capacity is the binding constraint on effective agency
4 (Proposition 4). The sub-regional variation in export diversification — East
5 Africa's HHI improvement from 0.31 to 0.19 versus West Africa's from 0.61 to
6 0.55 — cannot be explained by resource endowments alone: both sub-regions
7 contain resource-rich and resource-scarce economies. The differentiating factor
8 is governance quality: the East African countries that achieved the greatest
9 structural diversification (Kenya, Rwanda, Mauritius) consistently rank in the
10 top quartile of African WGI scores, while West African commodity-dependent
11 economies cluster in the bottom quartile. This finding directly challenges
12 undifferentiated accounts of African agency, whether optimistic or pessimistic:
13 the continent is neither uniformly dependent nor uniformly repositioning, but is
14 experiencing a process whose outcomes are strongly conditioned by domestic
15 institutional capacity.

16 17 18 **Discussion of Findings**

19
20 The empirical findings assembled across four domains and examined
21 through five analytical propositions permit a more precise characterisation of
22 Africa's global position than the binary dependency-versus-autonomy framework
23 provides. The evidence confirms that Africa is neither straightforwardly dependent
24 in the classical sense Wallerstein (1974) described nor straightforwardly emerging
25 in the sense that uncritical 'Africa rising' narratives suggest. The concept of
26 negotiated repositioning captures the specific configuration the evidence reveals:
27 genuine but partial partner diversification; structural commodity dependence that
28 has proved resistant to change despite diversified partnerships; new forms of
29 financial engagement that reproduce debt vulnerability at altered terms; institutional
30 foundations for collective agency through AfCFTA that remain incomplete; and
31 highly differentiated state-level capacity to leverage opportunities that the changing
32 global environment provides.

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

1 The most analytically significant finding of this study is the asymmetry
2 between partner diversification (genuine, measurable, documented in Table 2)
3 and product diversification (minimal, measured in Table 4). This asymmetry
4 reveals the specific mechanism through which negotiated repositioning differs
5 from genuine structural transformation: African states have expanded their
6 options within the existing structure of global production — trading with more
7 partners, accessing more financing sources, building more institutional
8 frameworks — without yet achieving the productive transformation that would
9 allow them to occupy higher-value positions in global value chains. China buys
10 African raw materials as readily as Europe did; the productive structure of the
11 exchange has not changed even though its geography has.

12 This finding has important implications for how 'Africa rising' narratives
13 should be evaluated. The GDP growth rates that drove those narratives in the
14 2000s and early 2010s were predominantly commodity price-driven: African
15 economic growth was strongly correlated with global commodity price indices,
16 decoupled when prices fell in 2014-2016, and recovered when they rose during
17 the 2021-2022 global commodity cycle. Growth that depends on commodity
18 price cycles is not structural transformation and does not represent the kind of
19 productive development that dependency theorists from Amin (1976) to
20 Hausmann and Rodrik (2003) have identified as the necessary foundation for
21 sustained development.

22 The AfCFTA evidence (Table 5) represents the most genuinely novel aspect
23 of Africa's contemporary global engagement. No previous generation of African
24 regional integration — not the ECOWAS protocols, not SADC, not COMESA
25 — achieved a continent-wide framework with 54 signatories, an operational
26 secretariat, and an active implementation monitoring mechanism. The NTB
27 portal's 401 notifications represent a form of institutional transparency that
28 creates accountability for non-tariff protectionism that did not previously exist.
29 The services protocol represents a recognition that Africa's comparative
30 advantage is shifting toward higher-value activities in finance, logistics, and
31 digital services — precisely the sectors where East African states are achieving
32 structural diversification.

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

45 The sub-regional variation documented throughout the empirical analysis
46 supports Proposition 4's claim that agency within Africa's global engagement is

1 not uniformly distributed but is strongly conditioned by institutional capacity.
2 Rwanda's transformation from conflict-affected subsistence economy to East
3 Africa's governance benchmark and services hub; Kenya's development of a
4 fintech sector that processed transactions equivalent to 50 percent of GDP
5 annually by 2022; Mauritius's position as Sub-Saharan Africa's highest-scoring
6 state on the Mo Ibrahim Index and its transformation into a financial services
7 centre — these are genuine achievements of strategic agency that require
8 explanation beyond structural position.

9 What they share is not resource wealth, geographic advantage, or historical
10 legacy — Kenya and Rwanda both endured devastating political violence in the
11 1990s and 2000s — but deliberate institutional investment, coherent industrial
12 policy, and leadership commitment to productive economic transformation over
13 patronage-driven distributional politics. This finding is consistent with Evans's
14 (1995) embedded autonomy thesis: the capacity for developmental state agency
15 requires both institutional coherence (the bureaucratic independence and
16 effectiveness that prevents capture) and social embeddedness (the links between
17 state and productive sector actors that enable coordinated industrial strategy).
18 The states that have achieved the most effective negotiated repositioning are
19 those that have most closely approximated this configuration — not without
20 contestation, not without setbacks, but consistently enough to achieve
21 measurable structural change.

24 **Conclusion**

26 This study began with a specific empirical question: do the observable
27 changes in Africa's global engagement — diversified trade partners, new South-
28 South financial relationships, AfCFTA, growing diplomatic presence —
29 represent genuine movement beyond structural dependency, or a reconfiguration
30 of dependency at altered terms? The systematic evidence assembled across four
31 domains over a twenty-two year period permits a more precise answer than either
32 simple dependency or simple autonomy narratives can provide.

33 The evidence confirms four specific empirical propositions. Africa's trade
34 partner concentration has declined measurably (HHI from 0.21 to 0.13),
35 confirming genuine partner diversification. But export product concentration has
36 barely changed (average HHI from 0.44 to 0.39), with primary commodities still
37 constituting 72 percent of SSA exports in 2022 — confirming the persistence of
38 structural commodity dependence despite partner diversification. Chinese and
39 South-South debt has provided genuine additional financing options while
40 contributing to aggregate debt accumulation that has raised the share of countries
41 at high distress risk from 11 to 42 percent, confirming that new partnerships
42 reshape rather than eliminate financial dependency. AfCFTA has built genuine
43 institutional foundations with 78 percent tariff schedule submissions and an
44 active dispute mechanism, but intra-African trade remains at 16.8 percent
45 compared to ASEAN's 60 percent, confirming that collective agency
46 mechanisms exist but transformation is incomplete. Institutional capacity

1 consistently discriminates between states that achieve structural diversification
2 and those that do not, confirming that agency is differentiated rather than
3 uniform.

4 These findings support the concept of negotiated repositioning: Africa's
5 trajectory is shaped by the genuine exercise of strategic agency within real and
6 enduring structural constraints, producing outcomes that are neither inevitably
7 toward greater autonomy nor inevitably toward renewed dependency, but
8 contingent on institutional capacity, policy coherence, and the specific
9 configuration of external partnerships. The concept advances on both classical
10 dependency theory (which cannot account for the variation in outcomes
11 documented here) and uncritical agency approaches (which cannot account for
12 the persistence of commodity dependence and debt vulnerability).

13 Three policy implications follow directly from the empirical findings. First,
14 the product-partner asymmetry finding implies that trade partner diversification
15 — however important — is not sufficient for structural transformation; active
16 industrial policy to develop productive capabilities in manufacturing and
17 services is the binding constraint on converting partner diversification into
18 development. The East African cases demonstrate that this is achievable under
19 conditions of institutional coherence. Second, the debt vulnerability finding
20 implies that new financial partnerships require better institutional frameworks
21 for transparency and terms-monitoring; the AidData evidence on opaque
22 collateralisation in Chinese loan contracts points to the need for African states
23 to develop the institutional capacity to assess financing terms rigorously, an area
24 where multilateral technical assistance has a clear role. Third, the AfCFTA
25 implementation gap finding implies that the agreement's potential will be
26 realised only if rules-of-origin frameworks are reformed to incentivise intra-
27 African intermediate goods trade, and if the services protocol is implemented
28 with sufficient ambition to capture the areas of genuine comparative advantage
29 that East African economies are already developing.

30 Future research should prioritise three areas. First, firm-level data on the
31 terms of Chinese and other South-South financing agreements — including
32 collateralisation arrangements, technology transfer requirements, and local
33 content provisions — are needed to move beyond aggregate debt statistics to the
34 micro-political economy of individual deals. Second, AfCFTA's developmental
35 impact will require longitudinal assessment as implementation deepens and the
36 two-year data window expands. Third, subnational analysis within large African
37 economies — examining which provinces, sectors, and communities benefit
38 from global engagement and which do not — is essential for evaluating whether
39 even the positive trajectories documented in governance-strong states are
40 generating inclusive development or merely elite-oriented growth.
41

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