4. Africa's trade arrangements with the United States, the United Kingdom, and other prominent partners

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This book's metaphorical zoom lens scans out in this chapter to focus on the US, the UK and other selected trading partners. These are all significant but not dominating partners within Africa's trade, with each accounting for up to 5 per cent of Africa's trade. They are, however, countries with substantial and evolving trade policies with Africa. The US's importance to Africa's trade goes far beyond the modest level of trade flows. Not only does US trade policy shape its bilateral trade and investment relationship with African countries, it also influences the global trade policy environment in which African countries operate. The centrepiece of US–Africa trade policy is America's 2001 African Growth and Opportunity Act (AGOA). For all its shortcomings, it provides a model that could be emulated by other partners to allow the sequencing of trade reforms and building of productive sector capacities (including through implementation of the AfCFTA and other trade reforms) before Africa enters reciprocal trade deals.

For the UK, Brexit, or its withdrawal from the European Union on 31 January 2020, is the pivotal event that is driving its trade with Africa. While inside the EU, the UK was bound by the former's trade policy, the main pillars of which were discussed in Chapter 3. With Brexit, the UK can design its own trade policies and strategies. Disappointingly, the UK mainly replicated these agreements to which it had been a party in the EU to ensure continuity in its trading arrangements. Besides Africa's trade relations with the EU, China, the US and the UK, it is also worth highlighting some notable features in other bilateral trade relationships. India, Turkey, Japan, Russia and Brazil are considered in brief notes in this chapter.

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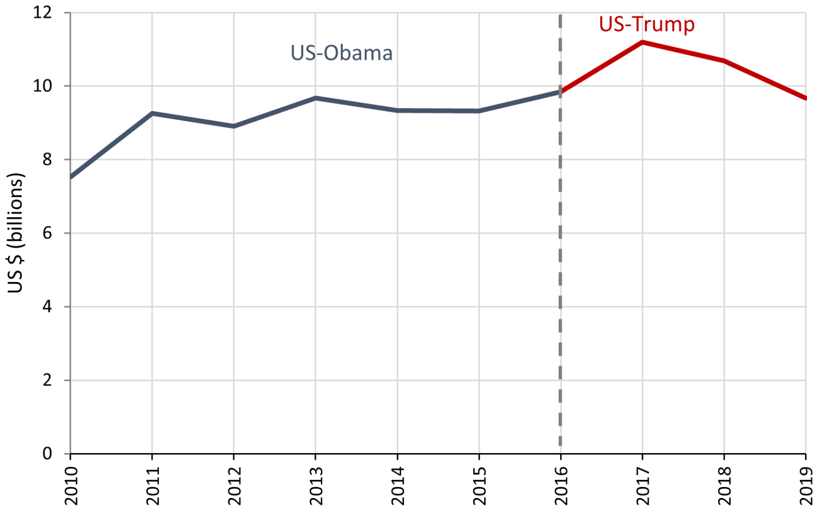
4.1 US–Africa trade

US–Africa trade policy is in the mature phases of the trade policy cycle, with the cornerstone African Growth and Opportunity Act (AGOA) initiative having been in force for over 20 years. Yet with AGOA set to expire in 2025 change may be afoot. Despite this, the shape and contours of these changes remain unresolved, with significant implications for African trade policy and its coherence across the continent. This section presents US–Africa trade policy within the context of broader US foreign policy towards the continent. It explains the central role of AGOA in US–Africa trade arrangements and charts the ways in which the post-AGOA landscape is emerging, including with the discussions for bilateral negotiations between Kenya and the US.

Africa accounts for a relatively small share of US trade (1 per cent between 2018 and 2020). Accordingly, trade amounts to only a secondary part of overall US foreign policy towards Africa, which has instead long been dominated by issues of peace and security, counterterrorism, health, and support for democracy (such as through election monitoring). The US Strategy Toward Sub-Saharan Africa, launched in August 2022, reaffirms these priorities while introducing a greater emphasis on climate adaptation and a 'just energy transition', but largely overlooking trade engagement. Where trade most strongly comes out in that strategy, it is with regard to security of access to Africa's 'critical minerals'. Nevertheless, the US is an important part of Africa's foreign policy environment. That is clear from the 41 (out of 49 invited) African countries that attended at a heads of government level the December 2022 US–African Leaders' Summit. The US accounts for a relatively larger share of Africa's trade (5 per cent of both imports and exports), and the US is the second largest source of development assistance to the continent, after the EU. A substantial amount of this, amounting to $10 billion annually in recent years, can be classified as aid for trade. This includes investments in trade-related infrastructure and productive capacities, and support for technical assistance and economic adjustments to trade. Perhaps most importantly, however, the US also has an influential voice in shaping the multilateral financial, investment and trade frameworks that govern Africa's economic integration with the wider world. The influence of the US can directly affect Africa's trade relationships with third countries. To use just one example, the US pressured the EU in the WTO over the legitimacy of non-reciprocity in trade agreements offered by the EU to African countries (Simo 2018).

US trade policy towards Africa is curiously consistent. From the administrations of Bush, through Obama and Trump, to Biden, US trade policy towards Africa has changed little in substance (see Figure 4.1). Where it has changed, those changes have usually been retained across administrations. This consistency extends to trade-related development assistance, which has fluctuated little despite political pronouncements occasionally suggesting otherwise (von Soest 2021). The Biden administration has been expected to follow the traditions of US Africa policy with merely 'a different (more respectful) tone, but no major changes in policy' (Adegoke 2020).

Figure 4.1: US aid-for-trade disbursements to African countries, 2010–2019, US$ billions



Source: Based on OECD (2022).

Looming large in the periphery of US trade policy towards Africa is of course China. So much so, in fact, that it might better be said that Africa is often more in the periphery of a US trade policy obsession with China. At the launch of 'A New Africa Strategy' in 2019, then US National Security Advisor John Bolton mentioned China over 20 times (Vaidyanathan 2022). It is no secret that the trick to engaging US policymakers on trade policy in Africa is to reframe core issues around a contestation with China, using narratives such as 'falling behind', 'catching up' or 'mak[ing] America greater than China … in Africa' (Signé and Olander 2019). Such a framing of Africa as merely a theatre of US geostrategic intervention has deep precedents, differing little from post-independence policy oriented around contesting Soviet influence (Schraeder 1991). Where US trade policy towards Africa has changed more notably, it is often merely in tone. The Trump administration's tone in this regard might best have been characterised as apathy. The then commerce secretary, Wilbur Ross, cancelled his attendance at the US–Africa Summit in Mozambique in 2019, an event attended by 11 African presidents, due to 'scheduling conflicts' (Paquette 2019) – leaving no cabinet-level US representation in attendance.

Since then, the Biden administration has shifted the tone of US engagement with Africa, ostensibly emphasising the importance of the continent while underlining messages of 'mutual respect and partnership' and downplaying its China rivalry (Sandner 2020). Biden chose to deliver his first speech at an international forum as US president at the 34th African Union summit (Rattner and Whitmore 2021), though it was just a video message. In his tour of three African countries at the end of 2021, Anthony Blinken, the US secretary

of state under Biden, explicitly clarified that '[US] Africa policy is about Africa, not about China', but nevertheless retained oblique references to debt repayment and investment malpractices targeted at China (Hudson 2021). China was restated (alongside Russia) as representing strategic interests of 'contrast' in the continent in the 2022 US Strategy toward Sub-Saharan Africa.

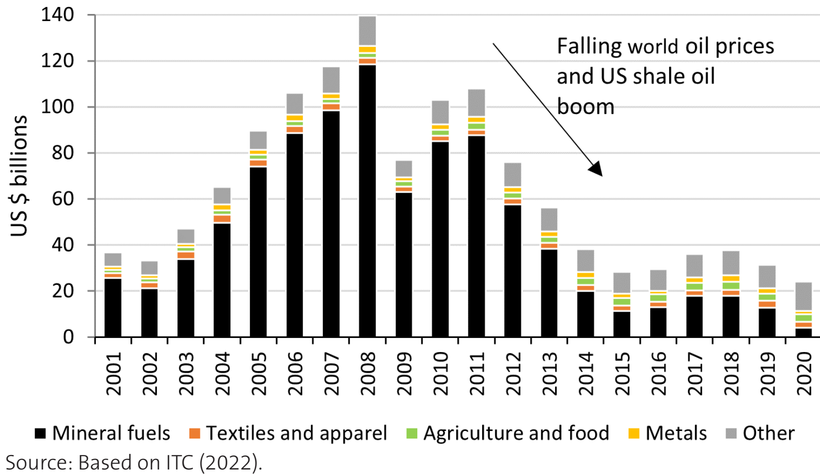
The linchpin of US–Africa trade policy: AGOA

AGOA is the cornerstone of US–Africa trade policy for the sub-Saharan part of the continent. Beyond this, in North Africa the US has one trade agreement with Morocco (signed in 2004). In US trade parlance, AGOA is an Act of the US Congress that provides preferential – essentially duty-free – access to the US market for qualifying goods originating in eligible African countries south of the Sahara. Most notably, AGOA is *unilateral*, requiring no reciprocal trade openness from African countries. As a mature trade policy (having been in force since 2001), its impacts have been extensively monitored and evaluated, reviewed against their objectives, and its merits and failings analysed (Condon and Stern 2011; Cook and Jones 2015; Didia, Nica and Yu 2015; Tadesse and Fayissa 2008).

The empirical evidence on AGOA's impact is mixed. Most studies identify improvements in the volume and diversity of African exports to the US (Cook and Jones 2015; Didia, Nica and Yu 2015; Yeboah, Shaik and Musah 2021), but some find limited – or even negative – effects (Moyo, Nchake and Chiripanhura 2018). Some of those studies are frankly methodologically better than others; the higher-quality ones tend to find positive, though modest, results. In recent years, AGOA has supported on average $1.2 billion in qualifying annual automobile exports, mostly from South Africa, as well as $1.1 billion in qualifying annual textiles and apparel exports, and $0.3 billion in qualifying agriculture and food exports from the beneficiary African countries (Figure 4.2). While US imports from Africa fell precipitously under AGOA, that was mostly driven by falling mineral fuel imports that were replaced with US sources of shale oil from 2009 onwards. Many African countries have recorded product-specific successes in goods exported under AGOA to the US including textiles and apparel (from Kenya, Ethiopia, Mauritius, Lesotho and Madagascar); automobiles (from South Africa); plant roots and travel goods (Ghana); chocolate and basket-weaving materials (Mauritius); buckwheat, travel goods and musical instruments (Mali); sugar, nuts and tobacco (Mozambique); and wheat legumes and fruit juices (Togo) (Schneidman, McNulty and Dicharry 2021).

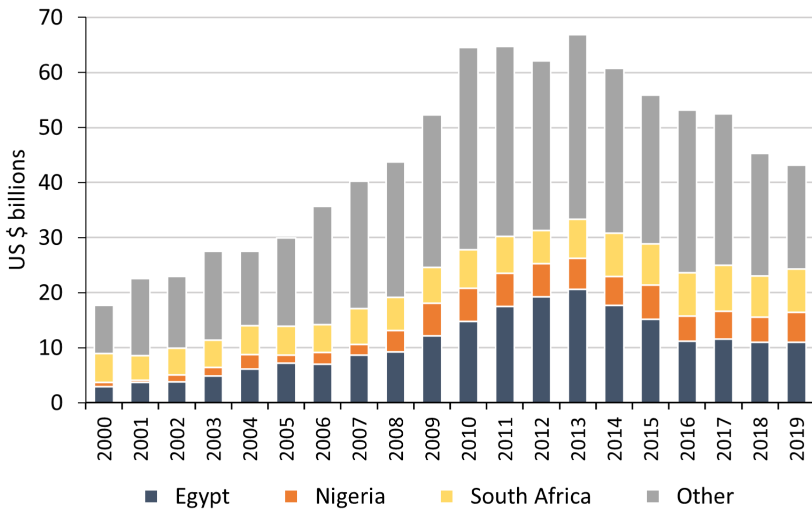
Beyond trade, AGOA was expected to promote investments in African countries. US investment in African countries did increase over the course of AGOA (Yeboah, Shaik and Musah 2021; Yeboah, Shaik and Wuaku 2021). However, and as indicated in Figures 4.3 and 4.4, these investments were disproportionally concentrated in a small number of countries and dominated

Figure 4.2: US imports from Africa, constant 2020 US$



Source: Based on ITC (2022).

Figure 4.3: US direct investment positions in Africa, constant 2020 US$

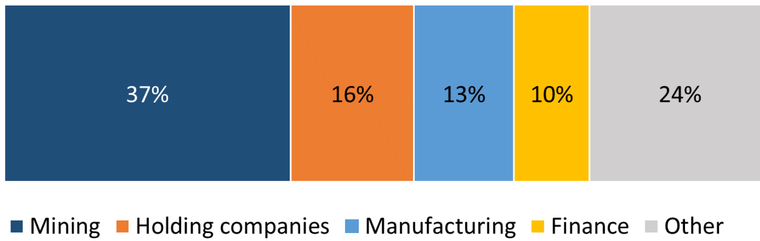


Source: Bureau of Economic Analysis, Balance of Payments and Direct Investment Position Data (2022).

by mining. Just 13 per cent of US FDI in Africa was in manufacturing, comparing unfavourably with EU investments, of which 41 per cent were in this sector (see Chapter 3). US FDI positions also fell following a decline in oil prices after 2014.

The most celebrated effect of AGOA has been the promotion of apparel exports from the subset of mostly lesser-developed African countries that

Figure 4.4: US direct investment positions in Africa, by industry, 2020



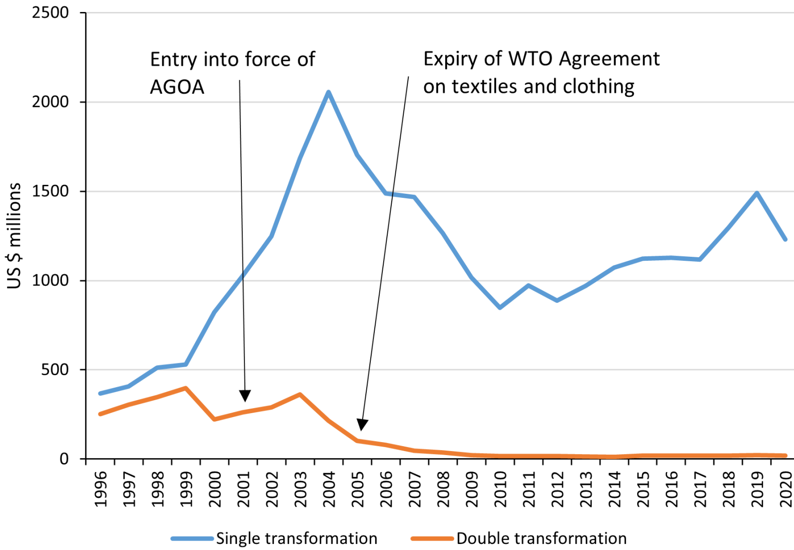
Source: Bureau of Economic Analysis, Balance of Payments and Direct Investment Position Data (2022).

were granted more lenient rules of origin (known as the third-country fabric provision). These rules allowed qualifying countries to benefit from AGOA preferences on clothes made from imported fabrics (single-transformation rules of origin). In practice, this allowed them to import fabrics from the most competitive fabric producers, such as China, so that they could in turn be more competitive in downstream manufactures of clothing and apparel products. In most other US preferential arrangements, such as the US–Mexico–Canada Agreement (USMCA), the US requires countries to comply with the considerably more onerous requirement of using locally sourced fabric or even yarn (double-transformation or triple-transformation rules of origin). As Figure 4.5 indicates, the African countries that benefitted from the third-country fabric provision were able to better weather the expiry of the WTO Agreement on Textiles and Clothing in 2005, which increased competition in the sector by removing long-existing import quotas that had restrained imports from more competitive suppliers. The African countries that did not benefit from the third-country fabric provision conversely saw their textile and apparel exports to the US virtually disappear after 2005. Critics of the third-country fabric provision have, however, argued that it has nevertheless been insufficient to substantively transform textile and apparel production in these countries, with beneficiary countries remaining only in the downstream part of the value chain (Condon and Stern 2011). Nevertheless, the experience of African exporters under AGOA demonstrates the critical importance of technical parts of the regime, and particularly rules of origin, for its success.

The challenges confronting AGOA have been well evaluated. Understanding these helps to consider not just redesigns of the AGOA initiative but also comparable initiatives by other countries. These challenges with AGOA can be divided into four categories: issues with the AGOA regime itself, with US trade market requirements more broadly, and with the policy environment in African countries, and limitations in eligibility.

- **Issues with the AGOA regime.** Owing to the gradual lowering of US tariffs and the granting of preferential regimes to other countries (such as Africa's competitors in Central and Latin America), preference

Figure 4.5: Single- versus double-transformation rules of origin for AGOA-qualifying apparel exporters, constant 2020 US$



Source: UN Comtrade via WITS (2022).
Notes: Clothes and finished textiles comprise HS61–63 as well as HS57 (carpets, rugs etc.), but exclude HS6309 (worn clothes).

margins offered by AGOA were also relatively low to begin with. Important products are excluded, typically agricultural ones where tariffs remain high, and, except for the apparel sector, rules of origin are argued to be too strict for most least-developed countries (Condon and Stern 2011). The generosity of the preferential margins offered by AGOA have also been eroded by subsequent free trade arrangements created by the US for other countries.

- **Broader US trade requirements**. African businesses struggle to access the US market owing to many non-tariff barriers. Product standards, sanitary and phytosanitary measures, and technical standards, as well as challenges in attaining visas for African businesspeople, make it difficult for African businesses – and especially smaller businesses – to use AGOA (Simon, Munishi and Pastory 2022).
- **Policy environment in African countries**. The strength of the trade support environment in African countries has determined whether or not they have been able to take advantage of AGOA (Kassa and Coulibaly 2018; Owusu and Otiso 2021). Important determinants include the quality of trade infrastructure, trade facilitation efforts, institutional quality and the stability of the local macroeconomic environment (Kassa and Coulibaly 2018). Countries with AGOA utilisation strategies designed to take advantage of AGOA have performed better (notably Ethiopia, Kenya, Madagascar and Mauritius) (Davis 2017;

Schneidman, McNulty and Dicharry 2021). Such utilisation strategies were specifically called for in the act renewing AGOA in 2015 (Section 107 P.L. 114-27).

- **Limitation in eligibility**. Most obviously, AGOA is a regime that applies only to African countries south of the Sahara. As a unilateral preferential regime, rather than a free trade agreement, AGOA also permits the US to disqualify African countries whenever they are deemed to no longer meet a range of requirements related to the rule of law and political pluralism, through to health and labour practices (ITA n.d.). Ethiopia, Guinea, Burkina Faso and Mali, for example, were suspended from the scheme in January 2022 following the conflict in the Tigray region and military coups in the three West African countries. Such insecurity over country eligibility is argued to erode investor confidence and have significant impacts when eligibility is withdrawn (Hoekman 2005; Oxford Analytica 2022; Williams 2015).

Beyond AGOA

With AGOA set to expire in 2025, the United States has since the Obama administration considered the possibility of replacing the regime with reciprocal free trade agreements with interested African countries. The special interest is a perceived competitive scramble with China, which overtook the US as a supplier of Africa's imports in 2004, and the EU, which has reciprocal trade agreements of varying forms in place with 20 African countries (Pecquet 2021). Several African ministers of trade have pushed for a solution before AGOA expires. Alan Ganoo, Mauritian minister for foreign affairs, regional integration and international trade, remarked at the 2021 annual AGOA ministerial conference that 'both sides need to work together on a mutually acceptable solution before AGOA expires' (Pecquet 2021). The US thinking on post-2025 trade policy with African countries was first publicly outlined in the USTR's 'Beyond AGOA' report of 2016 and has persisted since then to guide the next steps in this policy area through the Trump administration. The report identified four main options (USTR 2016):

1. **Comprehensive US-style trade arrangements**: including substantial market access liberalisation and a wide range of behind-the-border issues.
2. **Asymmetrical EU-type agreements**: narrower in focus, dealing primarily with tariffs and matters directly related to trade in goods, and requiring less than full tariff product coverage and longer phase-down periods for tariff reductions on the African side, but argued to be unlikely to be offered by the US, which has 'no precedent' for such an approach.
3. **Stepping-stone arrangements**: collaborative arrangements for less capacitated countries involving work programmes towards minimum

trade facilitation standards and implementing labour laws, in return for specialised technical assistance and capacity-building. These already exist in the form of trade and investment framework agreements with several African countries, including South Africa, Ghana, Nigeria and the EAC and ECOWAS regions, and generally aim at the US securing market access openings and policies that go beyond what is obtainable at the WTO, including US priorities in the areas of labour, the environment and intellectual property rights (Simo 2018).

4. **Continued unilateral preferences**: for countries that are 'too fragile or resource-constrained' in the near term to fulfil the full suite of obligations that are traditionally part of US trade agreements.

In the final months of the Obama administration, the US pivoted towards launching negotiations 'with whichever country or countries and/or RECs that are ready to proceed to that kind of relationship, without having to wait for others' (USTR 2016). The explicit policy of seeking out these free trade agreements is set out in Section 108 of the act renewing AGOA in 2015.

Kenya–US FTA negotiations: first mover advantage?

The first post-AGOA negotiations were launched in February 2020 by the Trump administration's trade representative, Robert Lighthizer, and Kenya's cabinet secretary for trade, Betty Maina. In addressing the outgoing US ambassador, Kyle McCarter, in January 2021, the then Kenyan president, Kenyatta, remarked that 'We appreciate what has been achieved through AGOA, but it is time we moved to much closer trade arrangements that are mutually beneficial' and that '[Kenya] will not lose focus on concluding the FTA' (Mburu 2021). These negotiations were a priority for Kenya in early 2022, retaining policymaking attention – and indeed attracting funding for Kenya's lobbying efforts in the US – despite 2022 being a Kenyan election year in which political attention had other distractions.

Under the Biden administration, the Kenya–US negotiations did not progress beyond the pre-negotiations phase of the trade policy cycle. Both Kenya and the US initially embarked on an admirably open, transparent and relatively participative approach to the pre-negotiations, involving the publication of negotiating objectives (summarised in Table 4.1) and the solicitation of comments on those objectives, as well as through a public list of agreed common principles for the negotiations. The US Summary of Specific Negotiating Objectives was published in May 2020, while the Kenyan Negotiating Principles, Objectives and Scope was published in June 2020.

The Kenyan objectives revealed a general intent to seize a perceived 'first mover advantage' in being the first African country to engage in such negotiations with the US (MITED 2020). Kenya intended to retain, and expand upon, valuable preferential access into the US market after 2025. The interest for Kenya was clear: the US is an important destination for Kenyan products,

Table 4.1: Comparative analysis of US and Kenya FTA negotiating objectives

	United States	Kenya
General objectives	• Create a model for additional agreements across Africa • Support to regional integration • Promote good governance and the rule of law	• Reap a 'first mover advantage' among African trade agreement with the US • Create a framework for additional agreements across Africa • Compatibility with regional and continental integration • Safeguards and exceptions to protect 'nascent' sectors • Promote FDI inflows and Kenya's position as a transit hub for goods and services
Trade in goods	• Comprehensive liberalisation (targeting textiles and apparel, pharmaceutical and medical products, and agricultural goods) • Non-tariff barriers • Commitments on SPS, TBT and trade facilitation	• Comprehensive liberalisation (no specified target sectors) • Non-tariff barriers • Cooperation agreement on SPS, TBT and trade facilitation
Rules of origin	• Strong enforcement procedures • Production in the territory of the Parties	• Simple and easy to implement procedures • Asymmetry and cumulation to encourage regional value chains
Trade remedies	• Cooperation, transparency and scope for existing US trade laws	• New mechanism for resolving trade remedies within the agreement
Anti-corruption	• Rules on anti-corruption	• Information exchange and cooperation
Trade in services	• Horizontal liberalisation and specific commitments in telecommunications and financial services • Narrow exceptions	• Elimination of restrictions on high-interest sectors (none specified) • Asymmetricity

(Continued)

Table 4.1: (Continued)

	United States	Kenya
Data	• Free data flow commitments • Interoperability of data protection regimes • Prohibition on customs duties on digital products	• Facilitation of digital trade and cross-border data flows • Support to innovation, entrepreneurship and hubs for start-up incubation, acceleration and innovation
Investment	• Reduce investment barriers	• Investment protection, promotion, facilitation and liberalisation
Intellectual property rights	• Commitments on levels of protection, procedures, and enforcement	• Cooperation, capacity-building and technical assistance
State-owned enterprises	• Regulations on SOEs	• Asymmetry
Competition policy	• Rules on procedural fairness, transparency and limitations in competition law enforcement	• None
Labour	• Enforceable commitments	• Cooperation
Environment	• Enforceable commitments on environmental, wildlife and fishing standards	• Cooperation
Government procurement	• Rules on transparency and non-discrimination • Reciprocity	• Cooperation • Asymmetry

Source: Authors' elaboration based on USTR (2020) and MITED (2020).

amounting to Kenya's third most important export market after Uganda and Pakistan (Ogutu 2020). In recent years, Kenyan exports that have utilised the AGOA preferences have amounted to $500 million annually, predominantly in the apparel and accessories sector (AGOA.info 2020).

Kenya also sought, in its published negotiating objectives, to address non-tariff challenges in accessing the US market, targeting a cooperation agreement on sanitary and phytosanitary standards, technical barriers to trade and trade facilitation. Beyond this, Kenya expressed in its specific

objectives an appetite for a substantial and deep agreement covering many behind-the-border regulatory issues such as intellectual property rights, investment, data governance, labour, the environment, and government procurement. Many of the Kenyan negotiating objectives were somewhat vague, however, and seem to amount to responses to US interests, rather than independent Kenyan priorities. It is curious, for instance, that the 'exchange of information on anti-corruption cases and initiatives' was among the negotiating objectives proposed by Kenya (MITED 2020). Their main objective was retaining US market access while diluting Kenyan commitments through aspects of asymmetry and special and differential treatment in which it would be held, as a less developed country, to lighter commitments than the US. In many areas of the negotiation menu, for instance, Kenya was more interested in provisions that would have established frameworks for cooperation, rather than binding rules.

The US objectives were considerable and deep. In addition to 'reciprocal' market access to the Kenyan market, the US objectives included substantial and hard behind-the-border reforms in the areas of intellectual property rights, digital trade and cross-border data flows, subsidies, competition policy, labour rights, the environment, anti-corruption, and government procurement. The US objectives also suggested a preference towards protectionist rules of origin, in line with US FTAs with other countries and regions (Erasmus 2020), and expressed little scope for the sorts of asymmetry or special and differential treatment desired by Kenya.

One of the greatest controversies with the Kenya–US negotiations was whether an agreement would undermine regional integration in the EAC or the AfCFTA. Though both Kenya and the US explicitly recognised the importance of Kenya's commitments to the EAC within their agreed negotiating principles, an agreement would have implied a deviation from the EAC's common external tariff. Such a deviation, though technically not impossible (Erasmus 2020), would have further undermined the longer-term aspirations towards the functioning of the EAC customs union by necessitating stronger checks on intra-EAC imports from Kenya to ensure that they did not amount to deflected US exports.

Conflict between the US–Kenya negotiations and the AfCFTA was less about technical feasibility than it was about prioritisation and eroding the value of Africa engaging as a coalition in trade policy. Part of the vision of the AU Agenda 2063 articulated in 2013 is for African countries to 'speak with one voice and act collectively to promote our common interests and positions in the international arena'. In the AU summit decision following the establishment of the AfCFTA in 2018, African heads of state 'Commit[ed] to engage external partners as one block speaking with one voice' and 'Urge[d] Member States to abstain from entering into bilateral trading arrangements until the entry into force of the Agreement establishing the AfCFTA' (African Union, Dec.692, 2018). In the subsequent summit of February 2019, this requirement was softened in a decision that stated that:

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> Member States wishing to enter into partnerships with Third Parties should inform the Assembly with assurance that those efforts will not undermine the African Union Vision of creating one African Market. (African Union, Dec.714, 2019)

Though there are clearly articulations of an ambition to negotiate as one and some seeds of effective coordination, the reality has included divergences that enabled the US–Kenya negotiations (Sunday and Wambu 2020). In bilateral negotiations with a large partner such as the US, Kenya would struggle to wield as much clout as would a united continental Africa. If the negotiations had progressed, Kenya would not have been as likely to achieve many of the asymmetricities and dilutions to the commitments it sought in the negotiations than could have been achieved by a united voice.

In early 2022, the US–Kenya negotiations were effectively suspended (Key Informant Interview 2022). The cessation of the negotiations came at the instigation of the US side: the Kenyan government and its private sector continued to exert diplomatic pressure and funded lobbying for the negotiations to resume (Key Informant Interview 2022). By 14 July 2022, the Kenya–US negotiations had been officially downgraded to merely the launch of a strategic trade and investment partnership (STIP). This is effectively, in the parlance of US economic engagements, a trade and investment framework agreement. The US has these in place with 13 other African countries and four African regional economic communities. Such agreements do not contain binding rules or rights but create a platform for further discussions that can evolve into commitments in a range of areas. The Kenya–US STIP is scheduled to involve discussions in eight areas: agriculture; anti-corruption; digital trade; environment and climate change; good regulatory practices; MSMEs; workers' rights and protections; and women, youth and others in trade. Notable, by their absence, are discussions on market access, which was the main negotiating objective of Kenya. Rather than attaining a 'first mover advantage', with the STIP, Kenya merely joined the groups of African countries that have collaboration frameworks in place with the US.

Introspection in US trade policy and 'Beyond AGOA' in flux

Four possibilities may have influenced the US in discontinuing FTA negotiations with Kenya and help to frame the likely shape of emerging US–Africa trade policy engagement. First, under President Biden, the US has become more focused on domestic priorities. Part of this relates to Biden's 'repeated call for America to lead by the power of our example', ahead of prioritising international trade engagements (Rattner and Whitmore 2021). The implication is a focus on the US first putting its own house in order and being less likely to strike trade agreements with any countries.

Second, in a reversal of the Trump approach, the US reprioritised multilateralism over bilateral foreign policy (May and Mold 2021). In November

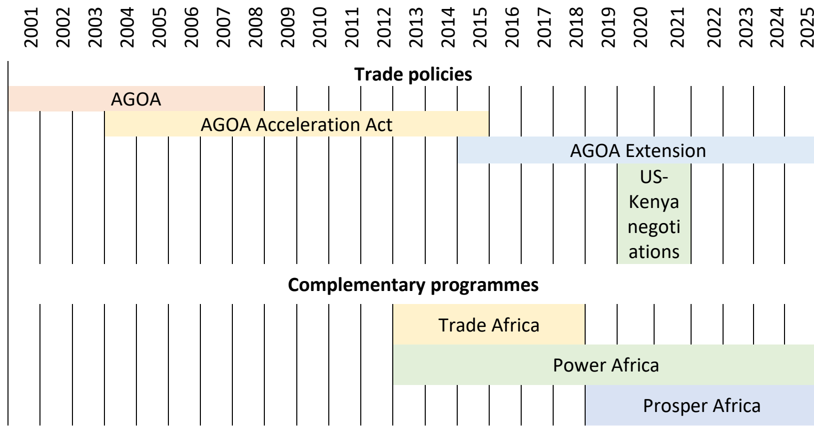
2020, in her nomination acceptance speech to become the US ambassador to the UN, Linda Thomas-Greenfield declared 'America is back. Multilateralism is back' (Brodo and Opalo 2021). Markers of this renewed multilateralism include support to Nigeria's former finance minister Ngozi Okongo-Iweala as director-general of the World Trade Organization, rejoining the Paris climate agreement, and resuming funding for the WHO. Third, the trade and broader international policy attention of the Biden administration pivoted to Asia. The Biden administration prioritised a new Indo-Pacific Economic Framework, which was launched in May 2022 (Busch 2021).

Finally, and perhaps most importantly, the US became involved in a period of more general trade policy introspection. An ideological clash is resolving within US trade policymaking circles between the establishment narrative of laissez-faire market openness (see Chapter 5), which had dominated US trade policy preferences for decades, and new trade policy objectives revolving around a 'unionised worker-centric trade policy', and climate, environmental and security goals (Foroohar 2022; Oxford Analytica 2021). Specific regional or sectoral aspects of trade policy must derive from a large trade policy vision. Only once such overarching goals are agreed can the administration move along the trade policy cycle and articulate coherent policies and craft strategic trade deals – or otherwise focus on alternative trade policy instruments.

Until this introspective period has concluded, and a new unifying US trade policy is clarified, US trade policy towards Africa is unlikely to involve a stepwise shift in direction or large leaps forward. While the conclusion of full-scale free trade agreements is unlikely in the immediate term, little steps may be possible including the renewal of AGOA. The outcomes of the US–Africa Leaders' Summit, held in December 2022, are suggestive of this. The 2022 US–Africa Leaders' Summit resulted in an array of economic recommitments. This included the Prosper Africa programme, introduced by the Trump administration in June 2019 and described by some commentators as the new 'centerpiece of US economic and commercial engagement with Africa' (Nikkei Asia 2021). The summit also reaffirmed American commitment to the Power Africa and Partnership for Global Infrastructure and Investment programmes, though the latter is globally oriented rather than focused on Africa specifically. New announcements included the establishment of an Advisory Council on African Diaspora Engagement, to advise on a range of social and economic programmes and initiatives, and a Digital Transformation with Africa initiative. Such programmes are important for addressing supply-side constraints to trade, stimulating investment, and resolving business barriers that limit that capacity of African countries to take advantage of cornerstone trade policies such as AGOA. They have long featured as complements to the market access afforded by AGOA (Figure 4.6).

The latter Digital Transformation with Africa initiative is notable. It is focused on investments to expand the size of Africa's digital marketplace, build digital skills, and also influence the shape of Africa's 'digital enabling environment' with support to digital governance (White House 2022). That

Figure 4.6: Beside AGOA: trade policies and complementary programmes



Source: Authors' elaboration.

cannot be viewed separately to the US seeking to encourage countries to come round to its vision of a relatively laissez-faire version of digital governance, as opposed to the more rights-based vision pushed by the EU, or authoritarian version offered by China (see Chapter 7). It may also involve 'advice' exerted against the imposition of digital services taxes levied by a number of African countries, including Kenya and Ghana.

The 2022 US–Africa Leaders' Summit also involved the signing of a memorandum of understanding between the US and the AfCFTA Secretariat. This will be the avenue for the US to follow through on its commitment to 'support the AfCFTA's implementation', announced in its August 2022 US Strategy Toward Sub-Saharan Africa. The memorandum of understanding contains limited substance beyond relatively soft, high-level commitments to cooperation activities such as information exchanges, best practice sharing, and dialogue. That is not surprising, and more details of the nature of the engagement will emerge once proposed technical working groups and an action plan have been developed. It is also commendably a publicly accessible document, unlike many other similar documents, which aids transparency and accountability. The identified areas of cooperation include digital trade, and presumably efforts to influence the AfCFTA Protocol on Digital Trade, industrial development and trade promotion, with an emphasis on sustainable development issues such as small and medium-sized enterprises and women in trade.

With regard to AGOA, and following the 2022 US–Africa Leaders Summit, the Biden administration sought to ask Congress to renew AGOA for 10 years. This followed successful lobbying efforts by African countries in 2022, such as the Lesotho Textile Exporters Association, which hired a Washington law firm, Ryberg and Smith, to help organise AGOA-focused meetings with US officials for Foreign Minister Matsepo Ramakoae during her visit to the

US for the UN General Assembly (Pecquet 2021). Efforts should now focus on ensuring that a renewed AGOA is even more effective than its previous iterations. Here the US seems to be receptive, with US Trade Representative Katherine Tai saying that '[AGOA] is no longer enough to boost [African countries'] development and a focus on improving investment is needed' and that AGOA needs an 'honest assessment' to 'increase utilisation rates', suggesting openness to its redesign in some form.

There are three categories of ways in which a better AGOA could be achieved. The first is through addressing problems with the programme itself, such as eliminating gaps in the product coverage of the AGOA programme and expanding the country coverage of AGOA to include North African countries. The latter may be possible if African countries can build a convincing case and link to the August 2022 US Strategy Toward Sub-Saharan Africa, which calls for the US to 'address the artificial bureaucratic division between North Africa and sub-Saharan Africa'. The second way to improve AGOA is with complementary measures, recognising that, for many of Africa's poorest countries, market access provisions in themselves are insufficient to motivate change. These complementary measures include the abovementioned programmes like Prosper Africa and Power Africa and support for the design and implementation of African countries' national AGOA utilisation strategies, as well as using trade and investment fairs and the US 'deal teams' within US embassies to boost practical trade and investment opportunities, alongside trade and investment facilitation services and trade capacity-building initiatives (Erasmus 2020). The final way in which AGOA could be improved is through linking it explicitly to Africa's regional integration initiatives and the AfCFTA, which is viewed favourably by the Biden administration. That would provide an opening for articulating a continental approach on trade that could link a beyond-AGOA deal to the AfCFTA (May and Mold 2021). That might also allow African countries more clout and influence in shaping the discussion than they could manage individually with such a large partner. Practical first steps would involve introducing supportive elements into AGOA, such as a cumulative rule of origin to encourage regional value chains across the continent.

Summary

AGOA is a generous offer, with positive elements such as non-reciprocity and uniform coverage among the eligible African countries. However, AGOA is limited to the countries south of the Sahara and, as a unilateral initiative, it comes with conditionalities that are determined by the US. As noted, the empirical evidence on the impact of AGOA is mixed. AGOA will expire in 2025. The US has been in an introspective phase on the role of trade in its foreign policy against the background of the Russia—Ukraine war and the geopolitical tensions associated with the rise of China. Various options are under consideration for a successor arrangement to AGOA. The signals suggest a

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lack of interest in the Biden administration in emulating the EU's EPAs and a reluctance in continuing the FTA negotiations with Kenya that were started by the Trump administration. It is also telling that Kenya's negotiation menu revealed a preference for trade and investment cooperation frameworks, rather than binding rules. The main Kenyan negotiating objective was to retain US market access while diluting Kenyan commitments through aspects of asymmetry and special and differential treatment, in which it would be held, as a less developed country, to lighter commitments than the US. Kenya's caution illustrates the unease of African countries in making reciprocal trade commitments at this stage of their development. The downgrading of the US–Kenya negotiations to a strategic trade and investment partnership allows Kenya to avoid difficult reciprocal commitments but also forgoes the Kenyan objective of securing continued US market access.

AGOA enjoys rare bipartisan support in the US Congress. As suggested, the US should use the opportunity for the renewal of AGOA to retain its positive features instead of replacing it with divisive bilateral agreements that would risk fracturing the continent and embryonic value chains. The US should establish a more conducive continent-to-continent arrangement. This would importantly include North Africa. For both the US and African countries, this would require greater vision and ambition. But, most significantly, it would require unity and consistency among African countries to work collectively and expeditiously. The African side should begin to lobby the US Congress, where Africa's small share of global trade flows is not seen as a threat and where 'trade not aid' is the basis of an already-broad consensus on the role that trade can and should play in Africa's development. They would need to show that such collective negotiations are possible, and beneficial. In AGOA, the generosity of the US's trade offer is unmatched by the EU, China, the UK and other partners. In the realm of geopolitics and geoeconomics, AGOA is surprisingly under-leveraged. A reformed AGOA along with a diversification of US investment flows would provide a model for the others to follow.

4.2 UK–Africa trade

Following its withdrawal from the European Union on 31 January 2020, or Brexit, the UK can design its own trade policies and strategies. However, to ensure continuity in its trading arrangements, the UK replicated the agreements to which it was a party in the EU. As seen in Chapter 3, these are the economic partnership agreements (EPAs), signed with selected African countries; the trade agreements with the North African countries; the Generalised System of Preferences (GSP), for low- and lower-middle-income countries; and the Everything But Arms (EBA) scheme, which provides duty-free and quota-free access to the EU market for countries classified by the UN as least developed (LDCs). In essence, these arrangements also reappeared in the UK's proposals for a Developing Country Trading Scheme (DCTS), which was launched for consultations in 2021. Along with the trade arrangements,

the UK outlined a strategic vision of 'Global Britain' that centres on boosting trade and investment promotion to generate prosperity at home and abroad. As applied to Africa, the UK announced its intention to augment trade and business ties and become Africa's 'partner for prosperity' (DFID and DIT 2020; DIT and FCDO 2022). Notwithstanding the rhetoric, recent developments suggest both short-termism and opportunism as the guide to UK engagement with Africa (Brien and Loft 2021; Hadfield and Logie 2020). The merger of the Department for International Development (DFID) with the Foreign and Commonwealth Office (FCO), to become the Foreign, Commonwealth and Development Office (FCDO), resulted in a significant attrition of development expertise. A reversal in the UK commitment to contribute 0.7 per cent of GNI to a development assistance commitment of 0.5 per cent has eroded the financial heft behind UK development policy.

On the other hand, it is noteworthy that the UK emerged as a leading supporter of the COVAX initiative, which aimed to ensure fair global access to Covid-19 vaccines, pledging £548 million and 80 million Covid-19 vaccine doses (Gavi 2021; Loft 2022a; Loft 2022b). This contrasted with the UK government's decision to oppose the initiative at the WTO for a Trade-Related Intellectual Property Rights (TRIPs) waiver to boost vaccine production more widely (Loft 2022b; Yoon Kang et al. 2021; see Chapter 5).

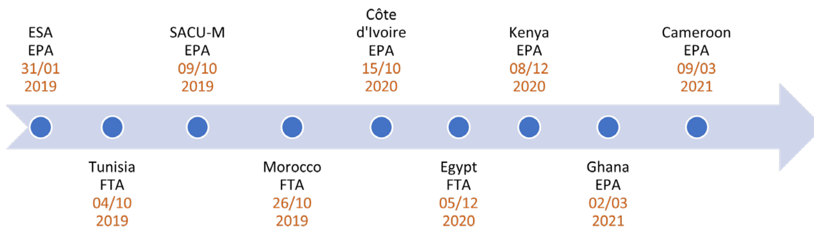
However, in quite short order, the UK has reshaped its trade support institutions with the aim of making them nimbler and more responsive. Considering declining levels of UK–Africa trade flows as noted in Chapter 1, these were much-needed reforms, although they will take time to deliver. On 29 March 2022, the UK announced a £35 million programme to support AfCFTA implementation including customs and other trade facilitation reforms in collaboration with the Overseas Development Institute (ODI), AfCFTA state parties, the AfCFTA Secretariat, TradeMark Africa (TMA) and other regional partners (DIT and FCDO 2022). However, by December 2022 it had become clear that the proposed support will be substantially reduced as the UK struggled with fiscal consolidation.

This section outlines the main developments beginning with the UK–Africa trade arrangements that emerged after Brexit became effective and the UK's proposals for the DCTS; the efforts to promote the vision of prosperity through three African investment conferences in 2020, 2021 and 2022; and institutional arrangements that support trade and investment flows with Africa.

Continuity over disruption

In the lead-up to its withdrawal from the EU, British negotiators and their counterparts put considerable effort into roll-over arrangements to avoid a 'cliff edge' upon the UK's extrication from EU trading arrangements. Many of these, however, were finalised only after withdrawal in January 2020. Figure 4.7 shows the timeline for the UK's roll-over of the EU's trade agreements with African countries. The first to be signed was the East and

Figure 4.7: Timeline for the signature of UK EPAs with African countries



Source: Authors' elaboration.
Notes: ESA is Eastern and Southern Africa; SACU is the Southern Africa Customs Union.

Southern Africa (ESA) EPA with Comoros, Madagascar, Mauritius, Seychelles, Zambia and Zimbabwe. This was followed by an agreement with Tunisia, the Southern Africa Customs Union (comprising South Africa, Namibia, Botswana, Lesotho and Eswatini), and Mozambique. Morocco, Côte d'Ivoire, Egypt, Kenya, Ghana and Cameroon were next.

A reflection of the asymmetry between the UK and African economies, the agreements are of partial reciprocity. They provide for duty-free and quota-free access for most goods imported by the UK with a gradual and progressive reduction of duties on goods imported by the African countries along with limitations on services and public procurement in African markets. The agreements also include hortatory declarations, including to promote economic and development cooperation, build trade capacity, and support regional integration.

In replicating the EU's EPAs, the agreements carried over an anomaly that establishes a separate trade regime with the UK between African countries in the same customs union. This is in effect a hard border in the customs unions concerned. This is the case for Côte d'Ivoire and Ghana in ECOWAS, Kenya in the EAC and Cameroon in ECCAS. The trade deal with the UK incentivises these countries to abrogate customs union disciplines and puts the internal cohesion of these vehicles of economic integration under strain (Luke, Desta and Mevel 2021). A provision in the preamble of these agreements that accession of other countries in the same customs union remains open is the fig leaf that is used to cover up this anomaly.[1]

However, some African countries – Nigeria famously among them – remain wary of the EPAs. This is mainly because of economic asymmetries and aspirations to reduce dependence on imported manufactures. As these sensitivities were ignored, the House of Lords International Relations and Defence Committee felt compelled to call for a 'coherent strategy' for Africa (UK House of Lords 2020). This was echoed by President Buhari of Nigeria, who called for an Africa-wide trade agreement with the UK (Buhari 2022). However, like the EU, the UK government's ambition is to widen and deepen the EPAs by adding new chapters in such areas as services, investment, public procurement and sustainable development (DIT 2022). Rather than using its

newfound trade policy independence to correct the mistakes of EU trade policy, the UK has merely replicated those policies and their errors. With regard to Africa, the UK's patchwork of trade agreements is no different to that which persisted while the UK was within the EU. Over the longer run, scope exists to improve upon these.

Developing Country Trading Scheme (DCTS)

In 2021, the UK published proposals on its concessional trade arrangements and launched consultations. The proposals, which mirror the EU's arrangements, embody measures for partial or full removal of customs duties on the UK's imports from developing countries. The government proposed three trade regimes for the DCTS (DIT 2021).

- A General Framework, for countries that are classified by international financial institutions as low-income and lower-middle-income countries.
- An Enhanced Framework with a wider range of product coverage for low and lower-middle-income countries with specific vulnerabilities such as small island states. This is like the EU's GSP+ scheme, and like its EU counterpart requires beneficiaries to adhere to certain conditionalities, such as implementation of international conventions on human and labour rights and the environment.
- The Least Developed Countries Framework, which provides for duty-free and quota-free access on all goods other than arms and ammunition, again mirroring the EU's EBA.

However, significant improvements to the EU's scheme were proposed by the government in the following areas.

- Tariffs: the government proposed to reduce or completely remove tariffs for goods in which low-income and lower-middle-income countries are competitive to stimulate trade with the UK.
- Rules of origin: the government proposed to introduce an updated list of product-specific rules for goods imported under the scheme and to expand the rules on cumulation for least-developed countries.
- Goods graduation: the government proposed to take a more targeted approach using UK trade data to graduate goods out of the scheme's preferential tariff rates.
- Conditionalities: the government proposed to simplify the conditions that could lead to a suspension or variation of preferences for any participating country and to simplify the reporting requirements for accessing preferences in the Enhanced Framework.

If introduced, these improvements will enhance the value of the scheme to the beneficiaries and better cater for the needs of vulnerable stakeholders, who are often overlooked when their country's concessions are withdrawn for violation of international conventions, sometimes causing long-term negative harm to them (te Velde and Mendez-Parra 2021). Scheduled to be launched in 2023, the proposed scheme is expected to cover 70 countries. According to the UK government, it will provide a 'simple, more generous and pro-growth approach to trading with developing countries' (Department for International Trade and Foreign, Commonwealth and Development Office 2021). Tables 4.2 and 4.3 provide an overview of what the UK's trade regime for African countries will look like following the introduction of the planned DCTS.

Table 4.2: African countries party to an FTA with the UK

North Africa free trade agreements (FTA)	– Egypt – Morocco – Tunisia
Economic partnership agreements (EPA)	– Cameroon – Côte d'Ivoire – Ghana – Kenya – ESA EPA: Comoros, Madagascar, Mauritius, Seychelles, Zimbabwe – SACU-M EPA: Botswana, Eswatini, Lesotho, Mozambique, Namibia, South Africa

Source: Authors' compilation.

Table 4.3: African countries that are beneficiaries of the UK's GSP

LDC Framework	Angola, Benin, Burkina Faso Burundi, Central African Republic, Chad, Comoros,* Congo DR, Djibouti, Eritrea, Ethiopia, Gambia, Guinea, Guinea-Bissau, Lesotho, Liberia, Madagascar,* Malawi, Mali, Mauritania, Mozambique,* Niger, Rwanda, Senegal, Sierra Leone, Somalia, South Sudan, Sudan, Tanzania, Togo, Uganda, Zambia
General Framework	Algeria, Congo, Nigeria
Enhanced Framework	Cabo Verde

Source: Authors' compilation.
Notes: *Comoros, Madagascar and Mozambique have also signed trade agreements with the UK (they are parties to the ESA EPA (Comoros and Madagascar) and SACU(M) EPA (Mozambique) and can trade under either the EPA or LDC framework regime (Key informant interview 2022a)).

The UK–Africa investment conferences

The Commonwealth provides the UK with a forum for regular meetings at the highest levels and other exchanges with the African member states. However, the UK has lacked a forum for engaging with Africa as a whole. The 'global Britain' ambition that was central to the vision of the 'leave campaign' during the Brexit debates, along with a nuanced view of a Britain that has shaken off its colonial past, required a new forum to engage Africa as a whole, not just the former British colonies. This was provided by the UK–Africa investment conferences, which have become institutionalised as an annual event for commercial diplomacy, mutual assessment of opportunities and exchange of ideas. Over 3,000 delegates from the UK and African countries attended each of the three events, held in 2020, 2021 and 2022.

The inaugural conference, held on 20 January 2020, was attended by several African heads of state including from countries outside the Commonwealth. It was envisioned by its organisers as an opportunity to facilitate business contacts. Among the announcements was an initiative to make $400 million available by the UK government-backed CDC Group (now British International Investment, BII) for a partnership with African regional banks for enterprise development (Reuters 2020). Twenty-seven deals were announced (Department for International Trade and Department for International Development 2020). But some commentators remained underwhelmed by the conference as a transformative initiative (Golubski and Schaeffer 2020; Yeates, Beardsworth and Murray-Evans 2020).

The second conference was held exactly a year later, on 20 January 2021. A new Africa Investors Group (a grouping of UK's largest investors in Africa) was unveiled, with a focus on four priority sectors – sustainable infrastructure, renewable energy, financial and professional services, agriculture and agri-tech (DIT, Duddridge and Grimstone 2020). A major theme was the government's roll out of a pro-business emphasis in its aid programmes. This followed the reversal of the commitment on ODA and the merging of the Department for International Development (DFID) with the Foreign and Commonwealth Office (FCO), effective from September 2020. The shift in focus was made clear in the government's Integrated Review of Security, Defence and Foreign Policy, published in March 2021:

> We will more effectively combine our diplomacy and aid with trade, working with our partners to adapt our offer. As governments become able to finance their own development priorities, we will gradually move towards providing UK expertise in place of grants using a variety of financing models to tackle regional challenges in our mutual interests. (UK Government 2021)

The UK, having hosted the UN Climate Change Conference in November 2021, focused on sustainable investment and green growth for the third event, in January 2022. A major announcement was £2.3 billion for the UK Export Finance Agency to facilitate UK–Africa business deals and the launch of the

Growth Gateway. This is a digital tool designed to provide information and practical advice to the UK and African business communities on investment and export opportunities. The Growth Gateway is the fourth instrument in a quartet of trade support institutions with key roles for boosting trade and investment with Africa (see Box 4.1).

Box 4.1: UK trade and investment support institutions

UK Export Finance (UKEF). UKEF is the government's export credit agency, operating under the Department for International Trade. Its main objective is to help exporters of UK goods and services to win business opportunities overseas by providing credit guarantees and insurance and reinsurance facilities. UKEF can also assist businesses that are not based in the UK with access to finance, loans and insurance for specific projects that rely on goods and services sourced from the UK (Tibke 2022). An example of a project funded through UKEF is £70.3 million for Contracta Construction UK to develop and modernise the Kumasi Central Market in Ghana (UKEF, DIT and Fox 2019).

British International Investment (BII, formerly Commonwealth Development Corporation – CDC). BII is the UK government's development finance institution, operating under the Foreign, Commonwealth and Development Office. Its mandate is to support the growth of businesses and jobs creation in Africa, Asia and the Caribbean (BII 2022). An example of its operations is a $100 million risk-sharing facility signed with the US bank Citigroup, aimed at expanding the latter's supply chain lending in Africa by boosting lending to small businesses across the continent by up to $400 million (Reuters 2022).

British Support for Infrastructure Projects (BSIP). Formerly the Developing Markets Infrastructure Programme, BSIP was revamped in early 2022 to support low- and lower-middle-income country governments to prepare, procure and finance development-focused, sovereign-backed sustainable infrastructure projects. Operating under the UK Foreign, Commonwealth and Development office with PricewaterhouseCoopers as the implementing partner, BSIP provides grants and technical assistance to enable governments to borrow at concessional rates for infrastructure projects where they are not able to do so commercially, or where they require concessional finance to support their national climate plans. It works collaboratively with UK Export Finance (FCDO 2022).

Growth Gateway. Operating under the Department for International Trade, the Growth Gateway is designed as a business support digital service that connects businesses in Africa and the UK to information and resources on trade, finance and investment opportunities. Very little information is currently (December 2022) publicly available on the Growth Gateway's operations.

Summary

In relation to the framework for analysing African trade policy outlined in Chapter 1, UK–Africa trade relations can be considered to be in the design stage at this early point of the UK's post-Brexit journey. Relatively low scores can be given for openness and transparency and inclusive participation since little attention has been given to these issues from both the UK and African perspectives. Some improvements in the DCTS were noted. But the scheme is essentially modelled after the EU's trade arrangements, which have a divisive effect on Africa's trade integration efforts. The priority has been efficiency. The UK and its partners in Africa strove for a roll-over of pre-existing EU regimes, like the EPAs, and the avoidance of a 'cliff edge' end to EU regimes to which the UK was a party. In imitating the EU's trade arrangements, the UK lost an opportunity to overcome the divisive implications of multiple trade regimes for Africa.

With the UK's investment in Africa highly concentrated in a few countries and sectors, the investment conferences highlighted new investment opportunities (Ottoway 2021). There is much that can be commended in the conceptual thought behind the design of the UK trade and investment support. But it is still too early to assess these initiatives for impact. However, it should be kept in perspective that through the 'invisible trade' of remittances it is the African diaspora in the UK that is the largest and most dynamic contributor to UK–Africa trade flows. This was estimated to be an annual $6.5 billion in 2015 (Westcott 2022), with scope for scale-up if transfer costs can be contained (FSD 2017; ODI 2022).

4.3 Recent developments in other bilateral trade relationships

While the EU, China, the US and the UK are Africa's most important trading partners, accounting for 48 per cent of Africa's exports, and intra-African trade accounts for another 18 per cent, a full 34 per cent of Africa's trade flows through other bilateral trading relationships. These are crucially important, if less individually significant, trading partners for the continent. Two aspects of Africa's trading relationships with these 'other' countries stand out. First, preferential trade arrangements are generally in place to incentivise trade growth. This is usually accompanied by significant trade promotion efforts supported by investment flows. Second, high-level summits are organised with periodic frequency to review and advocate for greater engagement in development and economic cooperation including trade and investment. One or both features are prominent in bilateral relations with India, Turkey, Japan, Russia and Brazil, which are considered in brief in this section. The actual trade flows with these countries are individually small, generally well under 3 per cent of Africa's total exports or imports (except for India, which accounts for about 6 per cent). In relation to the analytical framework

outlined in Chapter 1, these relationships are mainly at the initial phases of trade policy design. But steps towards deeper trade arrangements have been taken through the negotiation of FTAs by India (with Mauritius) and Turkey (with North African countries).

India

Since the early years of the 21st century, Africa's trade with India has climbed steadily upwards, with exports rising from just over 2 per cent of total exports by value in 2001 to 7.6 per cent in 2021 (IMF 2022). Similarly, imports into Africa from India have increased from 1.8 per cent to 5.5 per cent by value of total imports. India has a trade preferential scheme in place for LDCs since 2008 that allows duty-free entry for up to 98 per cent of tariff lines. Exports from Uganda, Tanzania, Rwanda, Zambia and Mozambique have increased under the scheme (Afrexim Bank and India Exim Bank 2018). However, the structure of this trade follows the familiar pattern of Africa's exports consisting mainly of fuels, minerals and precious stones and imports of manufactures such as clothing, textiles, pharmaceuticals, cereals, chemicals and machinery. Services are a prominent feature of India's exports including health care and digital and agriculture services (Karingi and Naliaka 2022). The Indian diaspora in Africa plays a key role in forging economic ties. Three Africa–India summits were held between 2008 and 2015 and frequent meetings at the ministerial level promote further engagement.

Indian investment in Africa also shows an upward trajectory, with the stock of Indian FDI rising from $11.9 billion to $15.2 billion between 2010 and 2014 (Afrexim Bank and India Exim Bank 2018). Distribution is fairly diversified covering natural resources, oil and natural gas (Côte d'Ivoire, Libya, Mozambique, Libya, South Sudan and Sudan); coal (Mozambique and Zambia) and copper (Zambia); agriculture, including tea production (Uganda and Rwanda) and floriculture (Ethiopia and Kenya); services, such as telecommunications and health care (Kenya), information technology (Ethiopia and South Africa) banking (Botswana, Ghana, Kenya, Mauritius, South Africa, Uganda, Zambia and Mauritius); manufacturing (Ghana and Nigeria); and pharmaceuticals (Nigeria) (Afrexim Bank and India Exim Bank 2018).

In the other direction, between 2010 and 2014, the stock of African FDI in India increased from $57 billion to $73.3 billion. This is mainly from Mauritius, which is a widely used conduit for Indian inward and outward FDI, owing to its low tax rates. Eswatini, South Africa, Seychelles and Morocco are among the other largest African investors in India. Investments from South Africa include Tiger Brands, Airports Company South Africa & Bidvest, SAB Miller, FirstRand Bank, Standard Bank, Old Mutual, Balela Leisure, Anglo-American, Sasol and Nandos Group Holdings. Morocco has invested in the production of phosphates in India, with Zuari Maroc Phosphore holding a 74 per cent stake in the previously state-run Paradeep Phosphate Ltd (Afrexim Bank and India Exim Bank 2018).

However, Mauritius remains India's most important trade and investment partner in the African continent, a relationship that has been formalised in an FTA, the Comprehensive Economic Cooperation and Partnership Agreement (CECPA), which was signed on 22 February 2021 and entered into force on 1 April 2021. The CECPA covers both trade in goods and trade in services. The agreement provides preferential market access for 615 products from Mauritius, including frozen fish, speciality sugar, biscuits, fresh fruits, juices, mineral water, beer, alcoholic drinks, soaps, bags, medical and surgical equipment, and apparel. Some 310 export items from India benefit from preferential market access in Mauritius, including foodstuff and beverages, agricultural products, textile and textile articles, base metal, electricals and electronic items, plastics and chemicals, and wood. FTA negotiations between India and the SACU counties and COMESA are in progress (Chaudhury 2020). This raises the prospect that a hotchpotch of trade regimes between African countries and India may emerge and complicate trade policy coherence within Africa as trade and economic integration initiatives unfold (Goyal 2022).

Turkey

Turkey's engagement with Africa is a strategic objective of its foreign policy (Orakçi 2022). According to the Turkish Foreign Ministry:

> Developing our relations and cooperation with the African continent constitute one of the basic principles of our multi-dimensional foreign policy. It is expected that Africa will play a more active role in the international system as of the second half of the 21st century and assume an increasingly important role on the global stage. The economic and commercial potential and geopolitical weight of the rapidly developing continent in several areas have started to attract a vast number of countries and investors to Africa in recent years. (Turkey Ministry of Foreign Affairs 2022)

As a member of the EU's customs union, Turkey's trade arrangements with Africa reflect those of the EU. Accordingly, its EBA, GSP+, GSP, EPAs and FTAs with the North African countries are aligned to the EU's and awkwardly replicate the shortcomings of the EU's approach. Recent years have seen active engagement in Africa by Turkey. As in the case of Africa's trade with India, this century has seen an upward crawl in Africa's trade with Turkey, although the North African countries account for half of total trade, which grew from $2.2 billion in 2001 to $16.5 billion in 2020 (equivalent to 0.8 per cent of Africa's trade in 2001 and 1 per cent of its trade in 2021) (IMF 2022).

Turkey is also active in infrastructure projects and air transport services throughout the continent. The cumulative value of infrastructure projects in

Africa topped $71.1 billion in 2020. Turkish airlines maintain connections to 60 destinations in 39 African countries (Turkey Ministry of Foreign Affairs 2022). The importance Turkey attaches to cultivating economic ties with African countries is reflected in three summits that were held between 2008 and 2021. An outcome of the 2021 summit hosted by Turkey and attended by 16 African heads of state was a pledge to achieve $50 billion in two-way trade over five years, with manufacturing, agriculture, construction, textiles, and health care identified as priority sectors (Minney 2021).

Japan

Both preferential trade and high-level summits feature in Japan's trade relations with African countries. Japan offers duty-free, quota-free and GSP and concessions to African LDCs and developing countries, respectively, for qualified products. Rules of origin are moderate but cumulation that allows for sourcing inputs between African countries is restrictive, which is a disincentive for fostering supply chains. Japan's main interest in Africa follows a well-trodden path of importing strategic minerals (from South Africa and other countries) and petroleum (particularly from Algeria and Nigeria). This is driven by the need for Japan to diversify its energy sources in the wake of the Fukushima nuclear disaster (Pajon 2020; Pathirana 2021). Japanese exports are mainly chemicals, machinery, automobiles and other transport equipment. Japan accounted for 4 per cent of Africa's imports in 2001, falling to 1.8 per cent in 2021 (IMF 2022). Japan accounted for 1.6 per cent of Africa's exports in 2001, rising to 2.1 per cent in 2021 (IMF 2022).

Japan barely makes the list of top 10 overseas development assistance providers to Africa (ranking ninth, just ahead of the UAE), providing $1.5 billion in 2019 or 3 per cent of ODA disbursements, according to the OECD. However, Japan is active in some infrastructure projects such as upgrading the ports of Mombasa in Kenya and Nacala in Mozambique and connectivity along the corridors served by these ports (Pajon 2020). Since 1993, Japan has sponsored the Tokyo International Conference on African Development (TICAD) as a regular forum for dialogue on economic cooperation. These forums are co-organised with the African Union, UNDP and the World Bank to provide a high-level platform for Japan's multilateral development frameworks and norms. At TICAD VII in 2019, attended by 42 African heads of state, $20 billion was set as a target for Japanese private sector investment in the period up to 2022, with a strong emphasis placed on business and investment partnerships. This will build upon the activities of Japanese entities such as the Japan Oil, Gas and Metals National Corporation, whose investment ceiling in natural gas and energy projects has increased, and the Japan Bank for International Cooperation (JBIC), which has provided infrastructure financing and promoted Japanese commercial operations through loans, equity and investment guarantees.

Russia

Measured against Africa's relatively small bilateral trade flows, Africa's trade with Russia is even more modest, accounting for just 0.2 per cent of African exports and 1.8 per cent of African imports in 2021. Bilateral trade between the two parties has evolved over the past decades, from $1.4 billion in total goods trade in 2000 to $10.3 billion in 2021. Africa mainly exports horticultural and other agricultural produce, minerals and precious stones and imports arms and cereal grains. Wheat accounts for 95 per cent of formal imports (although less thoroughly recorded weapons trade is also large) from Russia, making it crucial for food security, as the Russia–Ukraine war has revealed. Egypt, Sudan, Nigeria, Tanzania, Algeria, Kenya and South Africa are the main importers (Agence Ecofin 2022). By comparison, the main importers of wheat from Ukraine are Libya, Morocco and Tunisia (Millecamps and Toulemonde 2022).

While the Soviet Union was active in Africa during the Cold War years, including through backing liberation movements and leftist regimes, its successor, the Russian Federation, reduced its engagement. However, parading as a significant player on the geopolitical stage, Russian interest in Africa has grown in recent years including through paramilitary interventions in conflict situations in the Central African Republic, Burkina Faso and Mali. On the diplomatic front, Russia convened the first Russia–Africa Summit, which took place in Sochi, from 23 to 24 October 2019 (Panara 2019). Attended by 43 heads of state and government, it was a diplomatic success, although concrete deliverables in the key areas identified for cooperation such as high-tech extraction and processing of mineral resources, agriculture, and infrastructure development are yet to materialise (Foy 2019; Roscongress 2021). With extensive economic sanctions imposed on Russia following its invasion of Ukraine in 2022 and with 28 out of 54 African countries supporting a UN resolution that condemned the invasion (with most of the rest abstaining), the prospects for economic cooperation as envisaged at the summit have diminished (White and Holtz 2022). A second summit that had been planned for 2022 did not materialise (Devonshire-Ellis 2021).

Brazil

The Lusophone African countries (Angola, Cabo Verde, Guinea-Bissau, Mozambique and Sao Tome and Principe) were traditionally the leading trading partners with Brazil, with which they share historical and cultural ties. From 2003, under President Lula da Silva, who pursued an active 'South–South' foreign policy, this expanded to new trading partners such as Nigeria, Ghana, Mali and the Southern Africa Customs Union (SACU) countries (Freitas 2016; Oloruntoba 2014). An FTA between the Common Market of the South (MERCOSUR), of which Brazil (along with Argentina, Paraguay and Uruguay) is a member, and SACU (which includes Botswana, Eswatini,

Lesotho, Namibia and South Africa) was signed on 15 December 2008 and entered into force on 1 April 2016 (Tralac 2016). Agricultural and industrial sectors are covered but the spread of the preferential margin is wide-ranging, between 100 and 10 per cent. The threshold for rules of origin is high, requiring that non-originating materials do not exceed 40 per cent of value. Although trade flows remain small, two-way trade between the parties appear to have been given a nudge by the agreement. South Africa, for example, was able to increase its exports to Brazil by 37 per cent, going from $483 million in 2017 to $663 million in 2018 (DTIC 2019). A joint administration committee of the parties provides an institutional framework for monitoring the agreement.

Summary

Trade flows between Africa and what might be considered its important, but 'second tier', trading partners are modest, with trade relations at a nascent stage of trade policy design. A few FTAs are in place. These are limited in geographical coverage and generally arise out of specific circumstances. This is the case of the India–Mauritius FTA, with close ties between the two countries combined with Mauritius's general openness to trade liberalisation (see Chapter 3, which covers the China–Mauritius FTA). Turkey's FTA with North African countries is mainly a result of its membership of the EU customs union, which requires alignment with the bloc's trade arrangements. The MERCOSUR–SACU FTA has been led by Brazil's efforts to engage African countries, driven by a 'South–South' foreign policy launched by Brazil in 2003.

India, Turkey, Japan and Russia offer duty-free, quota-free (DFQF) access to the African LDCs but each places restrictions on what can be exported from the African countries. For India, the exceptions are meat and dairy products, vegetables, coffee, tobacco, iron and steel products, and copper products. For Japan it is rice, sugar, fishery products and leather products. For Russia it is petroleum products, copper, iron ores, leather products, apparel and clothing. Indeed, Russia's DFQF scheme only covers 36.3 per cent of tariff lines, compared to most others, which are over 90 per cent (WTO 2015). Turkey has no significant restrictions except arms and ammunition, replicating the EU's Everything But Arms offer to LDCs. In all cases, market access is further restricted by rules of origin and sanitary and phytosanitary requirements.

The strategic and symbolic importance attached to engagement with Africa by the partners is reflected in the institutional arrangements in various formats to facilitate discussions with African countries on common approaches to development, trade and investment. Japan's TICAD and the comparable efforts of India, Turkey and Russia (see Table.4.4) provide a forum for mutual geopolitical diplomacy between African leaders and the partners. The results of these partnerships so far have been modest, with an overwhelming focus on short-term trade and investment issues and interests. A strategic vision on how these partnerships (and others not reviewed in this section) can be

Table 4.4: Partner summits with African countries

	Japan	India	Turkey	Russia
Forum	TICAD	India–Africa Forum Summit	Turkey–Africa Summit	Russia–Africa Summit
First edition	1993	2008	2008	2019
Frequency	Every five years	—	—	—
Latest edition	2019 (TICAD VII)	2015	2021	2019
Latest edition's attendance	42 African leaders	41 African leaders	16 African leaders	43 African leaders

Source: Authors' compilation.

leveraged to support long-term economic transformation in Africa is yet to emerge from either the African side or the partners.

Conclusions: what Africa needs from trading partners

The main takeaway from this chapter builds upon the conclusions that were reached in Chapter 3 on Africa's trade with the EU and China, its biggest trading partners, which argued that the trade offer of these partners falls short of Africa's development needs. The current trading arrangements offered to Africa by its partners have done too little to transform Africa's trade from its disproportionate concentration in raw commodities and fuels. A new trade deal is needed for the continent. This should incentivise and reward trade diversification, expanded productive capacities, interconnected supply chains, and sustainable growth. The empirical evidence suggests that for these goals to be met, two complementary measures are required: the right sequencing of trade policy that prioritises intra-African trade (which is already more diversified than Africa's external trade) and liberalised trade with harmonised trade rules between African countries, as offered by the AfCFTA initiative (Mevel et al 2015). In that regard partner countries would, like physicians hoping to help their patients, do well to 'first do no harm'. But that is not always the current practice. The evidence suggests that implementing the EU (and other advanced country) reciprocal agreements like the EPA ahead of Africa's AfCFTA would result in losses in trade – or trade diversion – between African countries (Mevel et al 2015). The problem is that such agreements force African countries to undertake divergent regulatory and trade reforms rather than first consolidating better regionally.

The ideal trade deal for Africa is one that requires a broader trade-support framework. Trade preferences alone are an important but insufficient part of the solution. The experience of trade under AGOA with the US, through the

EU's various regimes, and under China's DFQF regime, show that more is needed. African businesses struggle with non-tariff barriers, such as product standards, sanitary and phytosanitary measures and technical standards. African businesspeople sometimes face challenges in obtaining visas, making it difficult for them – and especially smaller businesses – to meet business partners and strike deals. The policy environment in African countries themselves is often not supportive either. Many African countries have sub-par trade infrastructure, trade facilitation efforts, institutional quality and unstable macroeconomics.

Africa's trade partners can help by buttressing their trade preferences to Africa with a set of complementary measures. First among these are deliberate efforts to boost investments in African countries, but also to improve the type of investment, diversifying away from that disproportionately concentrated in extractive resources to instead those in agriculture and industry. Second are initiatives to ease the ability of African businesses to overcome non-tariff barriers. China has shown the value of deliberate, value-chain specific, 'green lanes' to fast-track agricultural exports, for instance. Third is the alignment of development assistance with trade. In programmes such as the EU's Global Gateway, China's Belt and Road, the US's Prosper Africa and Power Africa, the UK's British International Investment and British Support for Infrastructure Projects, and the multi-partner Trade Mark Africa, Africa's advanced country partners have recognised the need for investments to help unlock supply side constraints in infrastructure, energy, transport, education, health, research, and digitalisation, among others. Yet Africa's deficits in these areas persist and more support is needed.

As a 'late developer', Africa requires efforts to level the playing field if it is ever to catch up and achieve key elements of economic convergence. With strategic sequencing that would offer unilateral preferential access for African exporters now, and deeper reciprocal trade deals only when African economies are better integrated and ready, the world can create the right trade environment for the continent. Buttressed with complementary support measures, Africa's development partners can help unlock trade as the tool it should be to African sustainable development. By following the right sequencing for AfCFTA implementation prior to reciprocal deals, Africa will be given the opportunity to build productive capacities and achieve its potential for strong and diverse growth in intra-African trade, with inclusive and transformational consequences.

Note

[1] See, for example, Article 3.1 of the Explanatory Memorandum on the Interim Agreement Establishing an Economic Partnership Agreement between the United Kingdom of Great Britain and Northern Ireland and the Republic of Cameroon.

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