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POLICY BRIEF

BEYOND COMPETITION: HOW EUROPE CAN HARNESS THE UAE'S ENERGY AMBITIONS IN AFRICA

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SUMMARY

- Since 2020, the UAE has strategically expanded its involvement in Africa, marking a significant shift in its foreign policy and becoming an influential middle power on the continent.
- The monarchy has focused particularly on Africa's energy sectors, increasing its stakes in oil and gas, renewables, and in critical minerals. This is driven by its ambition to become a global leader in the energy transition and backed by its substantial logistical and financial resources.
- This growing engagement presents challenges for Europe, as the UAE captures market shares and promotes a green transition model that resonates more with African countries' needs and ideology.
- However, Europe shares some common goals with the UAE and Africa, such as expanding renewable energy and increasing Africa's access to energy.
- European countries should pursue a strategy of "co-opetition" towards the UAE, balancing competition in areas in which they have comparative advantages with cooperation in areas of mutual interest.
- By cooperating with the UAE, the EU could help fast-track the implementation of green initiatives in Africa and promote pragmatic solutions for the energy transition, possibly also improving its appeal as an inclusive partner in the global south.

Africa's new power player

A critical mass of middle powers, from India and Turkey to the Gulf monarchies, are increasingly affecting Europe's engagement across Africa. These middle powers have expanded their involvement in Africa's political, security, economic, energy, and climate spheres in recent years, leveraging great power competition and the fragmentation of global order to their advantage. They do not tend to operate according to a logic of fixed alliances, interacting instead with key partners from the global north and south on various issues despite divergences – and shaping an increasingly transactional global order, for which Europeans are ill prepared.

Their presence in Africa presents new challenges for Europe in a region of growing significance. Economically, they not only capture market shares in critical industries but their economic models – which are often state-backed – also tilt the playing field away from Europe. Normatively, they tend to align more readily with developing and emerging economies' aspirations for prioritising economic development, compared with Europe's emphasis on principles such as democracy, human rights, and good governance, including when it comes to environmental standards. Their appeal in Africa threatens to further dilute Europe's influence on the continent and give shape to an international system that is less aligned with European values and interests.

The United Arab Emirates has emerged as an exceptionally active middle power in Africa. Since 2020, the UAE has expanded its power projection and economic presence from its traditional areas of engagement in north and east Africa across the entire continent, employing a more centralised and geostrategic approach than ever before, and establishing the monarchy as one of Africa's most prominent investors and trade partners. In particular, the UAE has focused significant attention on Africa's largely untapped energy sectors, expanding its stakes in both oil and gas and renewables, as well as in the critical mineral sector – the backbone of the green transition. The monarchy is an attractive partner for African countries in this regard, thanks to its deep pockets and its advocacy for African positions towards the energy transition. Its preference for a gradual phase-out of fossil fuels – rather than the rapid phase-out advocated by the European Union – resonates with African countries' imperative to balance their green agenda with economic and social considerations, which is also shared by much of the global south.

European policymakers cannot afford to disregard the UAE's expanded presence in Africa. The UAE's financial muscle, alongside its existential need to diversify revenues from oil and gas, sprawling logistics network across the continent, and geopolitical ambitions to become a leader in renewables sectors makes Abu Dhabi a potential risk for Europe's influence in Africa. Faced with these factors, Europe could quickly see a loss of market access and control over trade routes. Furthermore, by actively contributing to Africa's electrification and connectivity, and portraying itself as a responsible global player, the UAE is winning favour in Africa which could further dilute Europe's already diminishing appeal on the continent. Meanwhile, its different perspectives regarding the pursuit of net-zero climate goals challenge Europe's approach to decarbonisation.

The EU and its member states therefore need to reassess both their perception of and engagement with the UAE in Africa, identifying areas in which they continue to be competitive and acknowledging their widening deficiencies in others. In this policy brief we outline the UAE's growing involvement in Africa, tracing the key diplomatic and economic instruments that are contributing to the UAE's sway on the continent and the risks and opportunities that this presents for European interests.

Rather than viewing the UAE as solely a rival, we argue that the EU and member states should devise a more nuanced approach of so-called co-opetition, balancing competition and cooperation. The energy sector presents an ideal opportunity for such an approach. European countries continue to have comparative advantages that they can use to compete with the UAE in some areas: Europe is the largest holder of foreign direct investment (FDI) stock in Africa; its energy companies remain dominant players in traditional energy sectors and possess significant technological and human capital; and its historic involvement in African countries give it a wealth of knowledge and networks. However, beyond competition and despite differing perspectives about the speed and path towards the energy transition, European, Emirati, and African positions converge on the overall goals – namely the expansion of renewable energy and increasing Africa's access to energy. Here, all partners could benefit from coordination, which would mitigate the risks and reduce the costs of investment. To this end, we highlight some areas where cooperation would be particularly fruitful and provide some strategic recommendations to guide European policy and industry players in navigating this complex landscape.

The UAE's shifting approach towards Africa

Before 2020, the UAE's engagement with sub-Saharan Africa evolved through distinct stages driven alternately by economic and security considerations. Africa began to capture the UAE's attention in the 2000s. The Dubai emirate – with its relatively limited oil reserves, especially compared to the capital emirate Abu Dhabi – started to expand its involvement beyond the oil and gas sector, investing in various sectors and initiatives to ensure its continued prosperity.

Africa was an appealing destination for such investments because of its untapped markets and natural resources, and the Horn of Africa ranked particularly high on the UAE's agenda due to its proximity and pre-existing trade and migratory relations. Emirati investors, mainly from Dubai, started to seize opportunities in sectors such as infrastructure, tourism, and agribusiness. Agricultural imports were particularly important for the UAE, which today still imports over 85 per cent of its food due to its limited arable land and challenging climate. Meanwhile, the country's growing imports of African gold played a strategic role in fuelling a burgeoning domestic gold-refining industry and re-export trade.

When the Arab uprisings swept across the Middle East and North Africa in 2011, however, the UAE began to shift towards a security-oriented foreign policy, seeking to project power against perceived regional rivals, notably Iran, Qatar, and Turkey, which it considered as threats to its influence in Africa. In 2015-2016, this regional competition extended to the Red Sea and the Horn of Africa, which were particularly strategic regions for the UAE, as they allowed it control over trade routes extending from the Red Sea and the Gulf of Aden to the Indian Ocean and the Mediterranean.

In an attempt to diminish the influence of its regional rivals in the Horn and Red Sea, Abu Dhabi embraced a more proactive policy towards countries in these regions, striking political alliances, military base agreements, and port contracts, as well as injecting large amounts of aid and investments. Between 2016 and 2019, for example, the UAE strengthened its relations with Ethiopia through official visits and financial support, as well as by facilitating the historic peace deal between Ethiopia and Eritrea in 2018. It also built close ties with the authorities of Somaliland and Puntland (Somalia), winning concessions for the ports of Berbera in 2016 – which it used as a military base – and Bosaso in 2017. And it provided financial assistance to Sudanese opposition and military groups to oust long-time leader Omar al-Bashir in 2019, de facto sustaining the civil war that erupted in 2023 and has been ravaging the country and its civilian population. Abu Dhabi also started to expand its engagement across the rest of the continent via diplomatic and economic relations, opening embassies in Angola, Chad, Ghana, Mozambique, Rwanda, and Zimbabwe in 2017-2018.

Since 2020, a confluence of factors has pushed the UAE's leadership to treat Africa as an ever more strategic region, prompting a reorientation of its foreign policy towards the continent and a more centralised, economics-driven, and continent-wide approach to its engagement. Three primary factors underpinned this shift. Firstly, the UAE needed to bolster its economy in the aftermath of the dual shocks caused by the covid-19 pandemic – which affected critical sectors for the monarchy such as aviation, logistics, and tourism – and the downturn in oil prices. It therefore began to prioritise an economics-based foreign policy and attempted to minimise the diplomatic, economic, and security risks associated with regional confrontations

. Africa, with its potential consumer base of 1 billion people, burgeoning population and middle class, unmet infrastructure development needs (including for energy access), limited logistics networks, and abundant natural resources, presented an untapped market on the UAE's doorstep for Emirati companies to explore.

Secondly, the acceleration of the global energy transition following the pandemic prompted concerns about the long-term relevance of oil-producing nations such as the UAE in global dynamics and about the prospect of comparable financial returns in a post-oil era – especially amid growing value chain disruptions and protectionist industrial policies such as China's export controls on critical minerals or the United States' Inflation Reduction Act. Abu Dhabi thus adopted a dual strategy, pushing back against the rapid phase-out of fossil fuels, while increasing its financial involvement in multiple strategic non-oil sectors, such as renewable energy and technology. Africa, once again, was an opportune region for such investments due to its solar and wind potential, as well as reserves of critical minerals essential for manufacturing green, digital, and defence technologies. Its growing demand because of urgent energy access needs (over half of the continent's population lacks reliable energy access) and the prospect of surging energy consumption in its rapidly growing economies also presented the UAE with opportunities to expand market shares in energy markets. Many African governments, sharing the UAE's inclination towards a gradual transition away from fossil fuels, have also supported the UAE's aspirations for an enhanced global profile in climate forums, such as the United Nations Climate Change Conference (more commonly known as COP).

Finally, the fragmentation of the global order that followed the covid-19 pandemic, escalating technology-trade tensions between the US and China, and Russia's war on Ukraine provided an opportunity and incentives for the UAE to pursue a stronger global role. To this end, it began to further diversify its strategic alliances, especially with non-traditional allies in the global south. As a significant geoeconomic player in this emerging order, the UAE has been able to carefully balance relationships with key trade and investment partners in the global north, while exploring fresh opportunities with partners from the global south, such as those in the BRICS+ grouping – which the UAE joined in January 2024. The monarchy was also able to capitalise on mounting African dissatisfaction with the West, and especially Europe, owing to their perceived interference in African domestic affairs, paternalism, and double standards. This discontent, while not a new phenomenon, has intensified in recent years, and found an embrace in the increasingly available alternative models of engagement, such as the Chinese and Gulf monarchies' focus on economic development, or Russia's security-dominated approach. The diversification of international engagement in Africa has, in turn, empowered the continent, enabling it to assert a stronger voice in global governance settings.

A notable example of this empowerment was the African Union securing a seat in the G20 in 2023, marking its increasing influence on the world stage.

COP28 in 2023, which was hosted by the UAE, exemplified the culmination of these dynamics. The conference resulted in an agreement to pursue a "swift, just and equitable transition" in a clear nod to the requests from the global south for an energy transition less dominated by the global north. In doing so, it underscored the UAE's growing influence in climate governance and ability to garner support in climate negotiations.

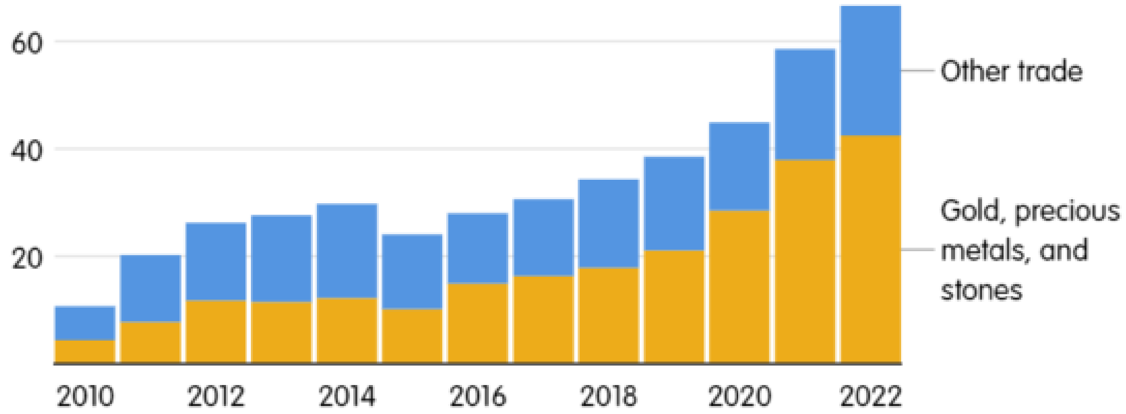
Geostrategic Abu Dhabi

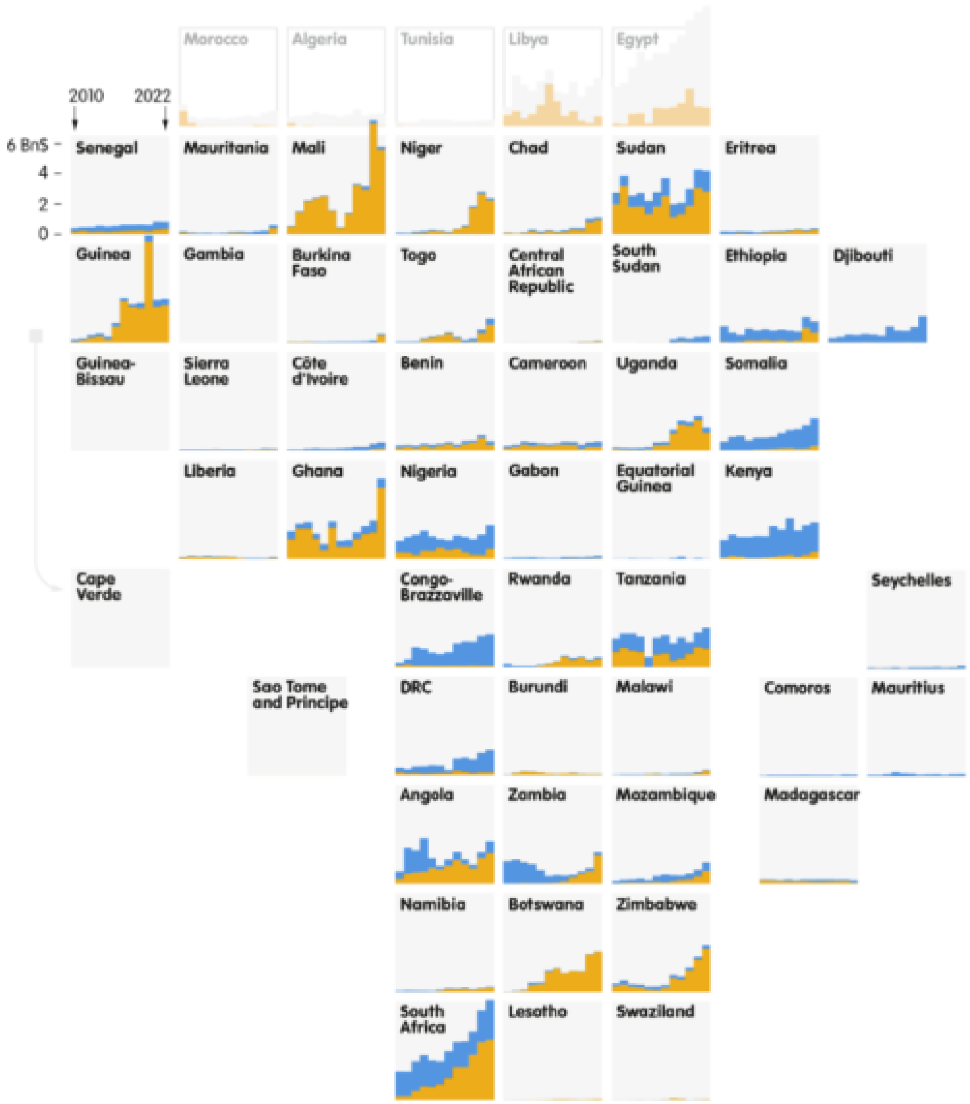
These transformative shifts ushered in a more centralised and geostrategic approach towards the whole of Africa from the Emirates, with Abu Dhabi progressively assuming a leading role in comparison to Dubai. In 2021, Abu Dhabi appointed the first minister of state dedicated to African affairs, Sheikh Shakhboot bin Nahyan Al Nahyan. Al Nahyan – a member of the Abu Dhabi ruling family – has since built a robust network with African leaders and ministers, meeting with the presidents of the Democratic Republic of Congo (DRC), Congo-Brazzaville, Guinea, Mozambique, South Africa, Tanzania, Uganda, Zambia, and Zimbabwe in 2022-2023 alone, underscoring the UAE's strategic intent to fortify relations beyond the Horn of Africa, especially in the southern and central regions of the continent. The UAE's president Muhammad bin Zayed Al Nahyan has also elevated his African diplomacy: in 2023, he held meetings with the DRC's president Félix Tshisekedi in Abu Dhabi and flew to Ethiopia to meet with prime minister Abiy Ahmed, as part of his first official visit to sub-Saharan Africa. On both occasions, he signed multiple deals fostering cooperation in key sectors, including energy and mining.

Trade

This diplomatic engagement has been accompanied by a substantial upswing in the UAE's trade and investment activities on the continent. According to official UAE statistics, trade between the UAE and sub-Saharan Africa soared from around $28 billion in 2016 to $67 billion in 2022 (excluding crude oil trade, which is negligible) and took place across the continent, with South Africa, Mali, Ghana, Sudan, and Zimbabwe topping the list of the monarchy's main sub-Saharan trade partners in 2022. This trade is calibrated to sustain the UAE's strategic ambitions. Mineral commodities, particularly gold, followed by precious metals and stones – mainly diamonds – dominate the UAE's imports from Africa. These help to sustain the UAE's gold refining business and contribute to its efforts to expand gold reserves, boosting its leverage vis-à-vis the US dollar, as well as allowing it to act as a hub for the trade of precious stones.

UAE trade with sub-Saharan Africa. 2010-2022, in billion US dollars





Source: UAE Ministry of Economy, International Trade Map.
Figures refer to non-oil trade.

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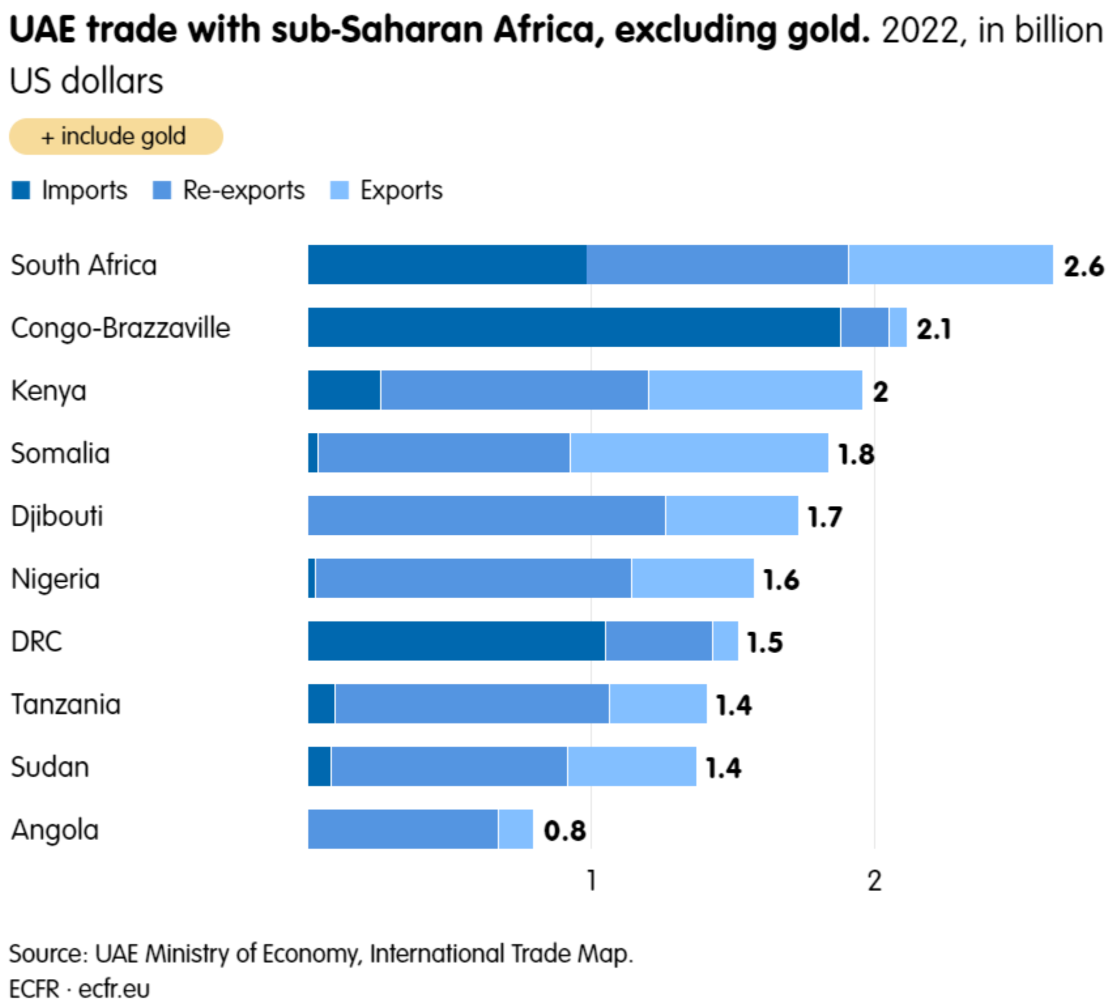
Excluding gold and precious stones and metals, the UAE's primary imports from sub-Saharan Africa are still minerals, most notably copper and aluminum-related minerals, for which Congo-Brazzaville, the DRC, and Guinea are the UAE's top three import partners. These natural resources are needed to sustain the UAE's ambitions in the green transition as well as its aluminum industry (the UAE is one of the largest producers of aluminum in the world), which feeds its construction and connectivity ambitions as well as those relating to renewables manufacturing.



Meanwhile, Emirati exports to Africa predominantly comprise manufactured goods, with refined petroleum products ranking as the top category – demonstrating how Abu Dhabi has managed to tap into the energy needs of Africa's emerging markets and in turn diversify markets for its petroleum products. For instance, the UAE's export of refined petroleum products to Kenya soared from $352 million in 2012 – a year of record-high oil prices – to almost $3 billion in 2022.

Kenya is also one of the countries with which Abu Dhabi has signed a Comprehensive Economic Partnership Agreement (CEPA), in addition to Congo-Brazzaville and Mauritius. These deals are part of the UAE's wider efforts to sign trade agreements with countries across the world in order to solidify its role as a trade facilitator. In fact, approximately two-thirds of the UAE's total exports to sub-Saharan Africa constitute re-exports, highlighting the UAE's strategic position as a trade hub connecting Africa, Asia, and Europe.

Investments

In addition to trade, Emirati investments in Africa have increased significantly in recent years. Between 2016 and 2020, the UAE injected $23.8 billion into Africa, securing its position as the second-largest bilateral investor on the continent alongside the US, trailing only China. Since 2015, the UAE has signed or ratified bilateral investment treaties with the majority of African states to protect and promote foreign investments through legal frameworks, strengthen international economic ties, and diversify investments beyond the traditional sectors of agribusiness, hospitality, and oil and gas to include infrastructure, logistics, telecommunications, mining, ICT, and clean energy.

But the real change of pace in this regard came in the last two years, as Abu Dhabi's sovereign wealth funds grew, fuelled primarily by the oil windfall following the outbreak of Russia's war on Ukraine, together with an expansion of the Emirati, mainly Dubai-based, private sector. In 2022, the UAE emerged as the leading source of capital inflows into Africa, totalling $50 billion – Egypt and South Africa were the primary recipients of these funds. This amount was nearly double the capital provided by France, Europe's largest contributor to African investments that year, and was seven times higher than the capital from the US. By 2023, the Dubai International Chamber had more than 32,000 African businesses registered and had set up new offices in Ghana, Ethiopia, Kenya, Mozambique, and South Africa to facilitate business networking with Dubai-based companies. Additionally, a growing number of international companies set up their 'Africa' headquarters in the UAE, including Airbus, Alibaba, DHL, Ericsson, and Samsung.

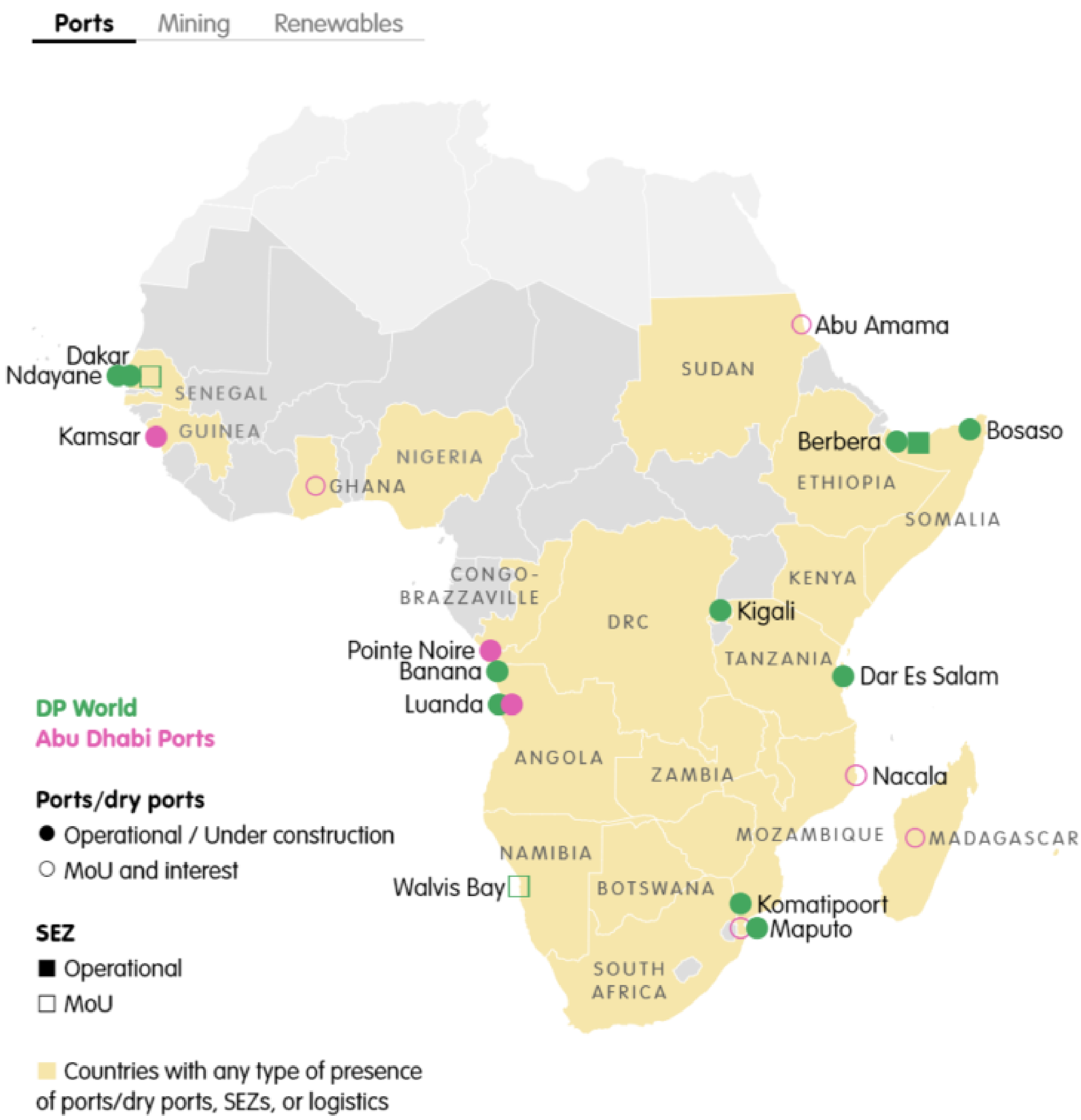
Infrastructure

Connectivity is critical to the UAE's commercial and investment ambitions in Africa and the UAE has taken an increasing interest in African ports in recent years. Emirati companies have constructed and expanded African ports and obtained so-called port concessions – granting them operating rights – for a total of 13 African ports, six of which have been agreed upon in the last four years. DP World and Abu Dhabi Ports Group – both owned by the Emirati royal families via holding companies – have been expanding their port and shipping portfolios around the world and especially in sub-Saharan Africa, in line with the monarchy's ambitions to enhance trade with Africa and make the UAE a connectivity and trade hub between Africa, Europe, and Asia. In Africa, they are now among the largest players in transport, logistics, and maritime services. Their modus operandi involves both partnerships with foreign companies, such as the CDC Group based in the United Kingdom or India's Adani Ports and special economic zone (SEZ), and acquisitions of local companies, such as Imperial Logistics and J&J Group, to optimise their commercial presence on the continent.

DP World began its expansion in Africa after it acquired P&O in 2006, which won it concessions in the ports of Dakar (Senegal), Maputo (Mozambique), and Djibouti (which was later rescinded by the Djiboutian authorities in 2017). But its expansion in sub-Saharan Africa gained momentum from 2016, when its intervention in Yemen along with Saudi Arabia and the geopolitical competition with its regional rivals saw it take a more assertive approach to secure the control of ports in the Horn of Africa. DP World won concessions to expand and operate the ports of Berbera, together with a SEZ, and Bosaso in Somalia. Since 2016, DP World has signed a number of agreements to invest and manage other ports, dry ports (terminals connected by road or rail to a maritime port), and SEZs across the continent. Today, it counts six operational ports (in Angola, Mozambique, Senegal, two in Somalia, and Tanzania) and two operational dry ports (in Rwanda and South Africa). Two more ports are under development in the DRC and Senegal. It has also signed memorandums of understanding with Namibia and Senegal for the development of SEZs. This expansion solidifies DP World's status as a leading port and logistics actor with a network spanning east, south, central, and west Africa.

Meanwhile, the publicly owned Abu Dhabi Ports (ADP) Group is jockeying to become another giant in the global logistics sector. ADP is controlled by Abu Dhabi Developmental Holding Company PJSC, a sovereign wealth fund chaired by the president's brother and national security adviser, Tahnoon bin Zayed Al Nahyan. In 2013, the company won its first African concession to expand and manage the port of Kamsar in Guinea in partnership with the sovereign wealth fund, Mubadala, and Emirates Global Aluminum, which were investing in bauxite mining and needed to upgrade the port to handle its export to the UAE. Besides Guinea, ADP initially focused on Egypt and the Red Sea. More recently, it started expanding across the continent, acquiring stakes to operate Luanda's terminal in Angola, signing a 30-year concession agreement with the government of Congo-Brazzaville to operate the multipurpose New East Mole terminal in Pointe Noire, and signing memorandums of understanding for ports and logistics in Ethiopia, Madagascar, Mauritius, and Sudan. It has also manifested interest in ports in Ghana and Mozambique.

UAE projects in sub-Saharan Africa in logistics, mining, renewables



Data is based on open sources up to 31 January 2024

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Beyond ports, DP World and ADP offer a wide array of transport and logistics services, both inland and offshore. DP World's existing portfolio in Africa includes SEZs, railway and transport services, dry ports and logistics venues, and even e-commerce, as well as a recent acquisition of South Africa's Imperial Logistics and Nigeria's Africa FMCG Distribution, making DP World's logistics network widespread across the continent. The two companies cover complementary geographical areas (with the exception of Angola, in which both have or have pledged stakes), sustaining the Emirati leadership's vision to promote the Emirati brand in global maritime infrastructure development. Their deals with countries along the Atlantic coast, such as Angola, Congo-Brazzaville, Senegal, and Namibia, show how the UAE is exploring partnerships beyond its traditional areas of cooperation. The EU has also begun to establish routes for mineral exports via the west coast, signing a strategic partnership with Namibia, for example, and another on the Lobito Corridor which runs from Zambia through the DRC using Angola's sea access for export, making this region of Africa a potential area of competition with the UAE.

Finally, air links are also key to economic development and regional integration. Emirates Airlines has played an important role here. The company is the major air carrier for both cargo and passengers in several African markets – and operates direct flights to 18 destinations in sub-Saharan Africa. In 2022, more than 10 per cent of air passengers (4.7 million out of a total of 46 million) departing from one of Dubai's airports travelled to an African destination, according to OAG Aviation.

Collectively, these logistics investments play a key role in improving the continent's internal and external connectivity, hence contributing to removing obstacles to the development of national economies and to greater regional integration. This positions the UAE as a potential game-changer for African countries but also a crucial interlocutor for other major and middle powers on the continent. Through its network of ports, the UAE can exercise control over critical maritime trade routes and influence global trade flows. This could pose risks for Europe, such as increased tariffs and fees, which could in turn raise shipping costs and affect global supply chains. The UAE's establishment of military ties with countries in which it runs commercial-maritime infrastructure could also heighten regional security tensions, with the potential to escalate conflicts or create new security challenges. However, the growing Emirati investments in Africa's infrastructure can also represent opportunities for Europe. Enhanced infrastructure can boost trade volumes and improve Africa's connectivity with global markets, providing economic growth opportunities for local and international partners and laying the groundwork for improving the climate for investment, including an upgrade in local skills, knowledge, and job creation.

Energy evolution: The UAE's dual strategy

This wide-reaching presence and connectivity has allowed the UAE to expand its involvement in Africa's strategically important energy sectors over the last two years. The monarchy has followed a dual approach, expanding its investments in Africa's oil and gas sector, while promoting and strengthening the renewable energy sector, including through increased attention on the mining sector – which is crucial for the UAE's aluminum industry and renewable energy sectors.

Sustaining the oil and gas industry

Currently, oil and gas account for 35 per cent of Africans' final energy consumption. This means that over one-third of all the energy consumed by end users such as individuals and businesses to, for instance, cool buildings, run lights, or power vehicles, comes from these two sources. Generators (largely oil-fuelled) account for 9 per cent of electricity consumption in sub-Saharan Africa – the highest proportion in the world. Natural gas alone makes up about 42 per cent of the electricity mix on the continent with Africa's industrialisation in the coming decades relying in part on expanding natural gas use. The UAE has therefore positioned itself to reap the benefits from the likely increase in demand for oil and gas linked to Africa's economic growth.

The state-owned oil and gas companies, Abu Dhabi National Oil Corporation (ADNOC) and Emirates National Oil Company (ENOC) have primarily directed their attention towards Africa's downstream oil and gas sector, focusing on the market expansion of the UAE's top export to sub-Saharan Africa: refined products. The UAE has also strategically supported countries in sub-Saharan Africa with their energy needs. For example, when a lack of liquidity and high oil prices left Kenya facing shortages of fuel supply in 2023, ADNOC and ENOC – alongside Saudi Aramco, Saudi Arabia's national oil company – stepped in to provide petroleum products on credit and delay payments, positioning themselves as critical economic, political, and social partners. The UAE is also exploring opportunities in the refining sector, unsurprising given that it is the top supplier of fuels to sub-Saharan Africa. In early 2024, for example, the Ugandan government announced that it had entered talks with UAE-based Alpha for the construction of a $4.5 billion oil refinery.

Emirati companies are also contributing to energy-related infrastructure to support the expansion of Africa's midstream oil and gas sector – the transportation, storage, and wholesale marketing of crude or refined petroleum products. In 2022, for example, ADNOC deployed supertankers in the DRC and Angola to enhance oil storage capacity, while ENOC has pledged to invest $400-500 million in a new petroleum facility in Tanzania.

ADNOC and ENOC have so far shown limited interest in Africa's upstream oil and gas sector, but recent deals hint at the possibility of a growing interest here too, in particular for gas. For example, ADNOC has recently acquired a stake in Mozambique's Rovuma liquefied natural gas (LNG) project and signed a deal with British Petroleum to develop gas assets in Egypt. Abu Dhabi identified natural gas as a critical transition fuel, aiming for it to account for 38 per cent of its energy mix by 2050. According to an expert on the political economy of energy in the Gulf states, the monarchy is aiming to diversify its suppliers to reduce its reliance on its competitor Qatar.[1] Although the UAE's limited involvement does not yet threaten Europe's stakes in Africa's gas (Africa accounts for about 20 per cent of European gas imports), there are signs that it could harbour future ambitions in the sector.

In addition, Emirati companies are leveraging their strengths in infrastructure and connectivity to tap into Africa's energy logistics and transport sector. For example, P&O Maritime Logistics – a subsidiary of Dubai Port (DP) World, the world's fourth largest port operator – provides logistical support to offshore oil and gas operations in countries including Mozambique, Nigeria, Gabon, Equatorial Guinea, and Angola. The UAE's other logistics giant, Abu Dhabi Ports (ADP) has shown interest in the LNG logistics sector too, and has recently acquired Zahker Marine International, a Dubai-based company which supports the logistics for Mozambique's offshore gas sector.

These efforts are positioning the UAE as an important emerging player in Africa's oil and gas sector, and challenging Europe's ambitions of a universal energy transition focused on the rapid phase-out of fossil fuels. However, there is space for cooperation on projects where goals overlap, at least in the medium term. For instance, the UAE has shown interest in supporting African energy-related initiatives that eye Europe as a final market. A notable example is the investment partnership signed in late 2023 between the Moroccan and Emirati governments to co-invest in the Nigeria-Morocco Gas Pipeline, a longstanding project to funnel natural gas from Nigeria (sub-Saharan Africa's main producer) along the west African coast up to Morocco and, ultimately, Europe. The project would expand the UAE's role in oil and gas connectivity while ensuring supply to Europe and helping it to sustain its energy needs after decoupling from Russia. While the pipeline is unlikely to be launched anytime soon owing to political, financial, and logistical hurdles, European public and private players should not overlook the UAE's interest in Africa-Europe energy initiatives and should look to take advantage of the Emirati funding flexibility and implementing capacity to fast-track vital energy projects.

In addition, the UAE has also been looking to Africa to help it decarbonise some of its industries, including oil and gas, steel, aluminum, and cement, through carbon offsets. These offsets are becoming a crucial, though still loosely regulated, mechanism for reducing, sequestering, or avoiding greenhouse gas emissions. They serve a dual purpose: for international companies, they accelerate net-zero strategies through projects such as reforestation, forest conservation, renewable energy installations, and the distribution of improved cooking stoves. Meanwhile, for many African governments, they present an attractive opportunity to generate revenue – as successful carbon offset projects generate carbon credits. Africa is particularly suited for carbon offset projects due to its vast natural resources, rich biodiversity, and significant developmental needs. In 2023, the UAE pledged to buy $450 million-worth of carbon credits generated in Africa by 2030. Blue Carbon, a carbon-offsetting company owned by a member of the Dubai royal family Sheikh Ahmed bin Dalmood Al Maktoum, has also struck a series of deals in recent months with Liberia, Tanzania, Zambia, Zimbabwe, and, reportedly, Kenya to generate carbon credits from the protection of large forest areas. However, such deals have sparked controversy, with critics arguing that the environmental benefits of such projects are often unclear, and raising concerns about transparency and potential adverse effects on local indigenous communities who inhabit the forests. This tension has led to calls for a more regulated and transparent carbon market. Coordination between the UAE, Europe, and Africa in this field would be very beneficial to agree on common standards. European players have an interest, for example, in better defining carbon markets, which could reduce the risks and costs associated with the carbon offset market.

Becoming a renewables leader

Meanwhile, in line with its ambitions to become a global renewable energy leader, the UAE has been working both for its own benefit to acquire market shares in renewable energy in Africa, and to support Africa's quest for energy access. The renewables sector presents particular advantages for the UAE to diversify revenue streams from oil and gas, which currently account for almost 30 per cent of the UAE's GDP, and to achieve its ambitious goal of reaching carbon neutrality by 2050. By supporting Africa's development in this way, the UAE is also able to present itself as a responsible global leader, rallying international efforts to achieve the goals of the Paris agreement, and frequently contraposing its approach to the Western one, which it criticises for not fulfilling its promises.

The UAE's clean energy majors – Dubai-based AMEA Power, Abu Dhabi-based Masdar, and the Egyptian-Emirati joint venture Infinity Power – have driven the expansion of renewable energy investments in Africa, investing in particular into solar and wind, with more limited interest in geothermal and hydropower.[2] At COP28, Masdar alone revealed its 10 gigawatt (GW) growth plan across six sub-Saharan countries reportedly in support of the recently launched Africa Green Industrialisation Initiative, which aims to channel investments into the continent's green industrial clusters and value chains. Meanwhile, in 2023, Infinity Power acquired the Amsterdam-based renewable energy company Lekela Power, which runs multiple wind power plants across Africa, making it the continent's largest private producer of renewable energy. In 2022-2023, the three UAE major companies signed agreements for almost 3GW of solar projects across sub-Saharan Africa, with several already under development.[3] Overall, the UAE's commitment to solar energy expansion in different corners of the continent is significant, given that by the end of 2023, Africa's operating utility-scale solar energy capacity stood at only 9GW, with South Africa and North African countries contributing the vast majority.

Emirati companies are also among the most active in the green hydrogen sector in Africa. The UAE is competing with other Gulf monarchies, such as Saudi Arabia and Oman, to become one of the world's top green hydrogen producers by 2050 and hold a 25 per cent market share of global trade – in part by leveraging Africa's abundant solar and wind resources. In 2023, Emirati energy companies announced six projects to construct green hydrogen plants in sub-Saharan Africa, the biggest of which as part of a landmark $34-billion deal between Infinity Power, the German developer Conjuncta, and the government of Mauritania to develop a 10GW green hydrogen plant in Mauritania. Meanwhile, AMEA Power pledged to install 1GW of green hydrogen facilities in Angola, Djibouti, Ethiopia, Kenya, and Mauritania, which, once completed, are expected to generate 15GW of electricity in total.

Through these projects Abu Dhabi can contribute to boosting industrial growth in emerging African economies: solar and wind projects primarily enhance energy access for the population, while hydrogen projects contribute to Africa's industrial ambitions. However, African-produced green hydrogen is likely to mainly be exported owing to Africa's limited industrial capacity to absorb it. Emirati companies like AMEA and Masdar will hence need the European market to make their African investments profitable.[4] Following the shocks to the energy market in Europe caused by Russia's invasion of Ukraine, the EU set a target to integrate 20 million tonnes of renewable hydrogen into its energy mix by 2030, half of which is to come from imports. African hydrogen is unlikely to be available by 2030, but it could help meet EU hydrogen goals in the longer term. Consequently, the EU and its member states should consider the UAE as a partner in the development of hydrogen corridors between Africa and Europe to strengthen Europe's energy supplies while also catering to Africa's development and energy needs. Given the long-term nature of such investments, joint projects to develop green hydrogen production and transport systems would represent a solid building block for trilateral cooperation, by enhancing European energy security, creating growth and employment opportunities in Africa, and providing a robust return on investments to Emirati players.

Minerals

Against the backdrop of its ambitions to expand its global shares in the clean energy sector, the UAE is increasingly concerned about access to minerals that are critical to manufacture green technologies and support its industrial ambitions – of which Africa is home to 30 per cent of the world's reserves.

Copper, for example – the UAE's main import from sub-Saharan Africa besides gold and diamonds – is critical for industrial applications, infrastructure development, and technology, including battery production. In late 2023, International Resources Holding (IRH), an entity listed under the UAE's largest conglomerate – International Holding Company – and controlled by the national security adviser and brother of the president, Tahnoon bin Zayed Al Nahyan, signed a $1.1 billion deal with Zambia's Mopani Copper Mines. Under the deal, IRH became an equity partner contributing finance for the completion of the mine's development and for restructuring its balance sheet following the exit of Swiss mining company Glencore in 2021. Besides Zambia, IRH has operations or prospects for expansion in Angola, Burundi, the DRC, South Africa, Tanzania, and Zimbabwe. In October 2023 Abu Dhabi-based F9 Capital and South Africa's QGC struck another strategic partnership for critical raw materials, which has already raised $1 billion from public investors, to develop lithium, nickel, and copper mines in South Africa.

The monarchy has also long consolidated its stakes in Guinea's bauxite sector, a mineral critical for the extraction of aluminium, which is in turn essential for a variety of green technologies, from hydrogen fuel cells via batteries to solar photovoltic panels. Abu Dhabi's sovereign wealth fund Mubadala invested around $5 billion back in 2013 to develop export logistics and a mine in Guinea, which has become the major supplier to Emirates Global Aluminum (EGA), the UAE's champion in premium aluminum production. Beyond exports, EGA has also pledged to build a refinery for alumina in Guinea.

The UAE has also been strategically targeting other minerals in Africa crucial for green technology manufacturing. For instance, the Dubai Investment Fund plans to invest in niobium – vital for electronics, clean energy, and hydrogen electrolysis, among other uses – in Nigeria from 2025 through a new subsidiary, Ignitica Minerals. Besides mining, the project pledges to include an industrial zone to refine the rare earth metal. In 2023, Abu Dhabi's Primera Group also pledged a $1.9 billion investment in the DRC's state-owned Société

Aurifère du Kivu et du Maniema. The deal follows a 2022 agreement between Primera Group and the government of the DRC, which envisaged granting Primera exclusive export privileges for 3TG ores (tin, tantalum, tungsten, and gold) extracted from artisanal mines in eastern DRC for a period of 25 years.

These recent agreements indicate an Emirati interest in increasing equity as well as trading stakes in highly sought-after mineral value chains. They also indicate efforts – albeit unfulfilled to date – to respond to Africa's increasing requests for local value addition through pledges to set up refining facilities. As the global demand for minerals intensifies with the ongoing energy and digital transitions, the UAE's forays into African minerals could position it as a key partner for technology-manufacturing nations, such as China, and allow the monarchy to play a strategic role in global geoeconomic dynamics vis-a-vis global powers. The UAE will nevertheless face competition, most notably from its regional rival, Saudi Arabia. The latter recently launched a far-reaching, $15-billion strategy to develop critical raw materials in Africa in a move to boost battery production and help it meet its ambition of producing 500,000 electric vehicles per year by 2030. The UAE's entry into the minerals sector is adding yet another layer of complexity for European players who lack, to date, the technical capabilities and financial will to step into mining exploration and extraction.

Green finance

To complement and support the scaling-up of energy investments, the UAE has pledged significant amounts of green finance. By investing in green growth on the continent and focusing on an agenda that fulfils the global south's needs, the UAE seeks to portray itself as a committed and reliable partner in Africa's energy transition, contrasting with the West's unfulfilled promises of a $100 billion annual green finance fund for developing nations, announced in 2009 but never fully realised. This proactive engagement in green sectors also serves the purpose of mitigating Western criticism of the UAE's continued advocacy for fossil fuels, underscoring a balanced approach that simultaneously takes into account climate objectives and Africa's development needs and industrial ambitions.

The conclusions of COP28 were a manifestation of this, during which the UAE announced the operationalisation of the long-negotiated Loss and Damage Fund; launched the $30-billion fund Altérra to invest in clean energy and other climate projects worldwide, with a particular emphasis on financing infrastructure in the global south; and co-launched with Kenya – one of Africa's more vocal advocates of the green transition – the Africa Green Industrialisation Initiative, with a call-to-action for global stakeholders to participate in fast-tracking Africa's green industrialisation. These initiatives were the culmination of a busy 2023 for UAE's visible commitments towards Africa. In early 2023, Abu Dhabi had launched the Etihad 7 programme, which commits to providing millions of Africans with clean energy by 2035 through blended (public and private) finance coming from Masdar, AMEA Power, the Abu Dhabi Fund for Development, and Etihad Credit Insurance. Africa50, an investment platform established by African governments and the Africa Development Bank, has also joined the initiative. And later in the year, during Africa Climate Week, the monarchy pledged $4.5 billion through the Africa Green Investment Initiative to support African economies in accelerating the green transition.

This green finance is supported by sovereign wealth funds, such as the Abu Dhabi state-owned investment fund, Mubadala, Abu Dhabi Fund for Development, and the Dubai Investment Fund. Their expanding presence is an important signal of a growing universe of funding sources when it comes to Africa. The arrival of the UAE as a major financier has been particularly appealing to African stakeholders who have long criticised Europe and the broader global north for not adhering to their commitment to support Africa's energy transition. The UAE is stepping into this void in a meaningful way, showing that they take energy and climate-related investment in Africa seriously.

A new competitor for Europe

Given Africa's strategic significance for Europe's energy security, decarbonisation, and green industrial ambitions, the UAE's expansion into its energy and mineral sectors poses some clear risks to European objectives, spanning economic interests, geostrategic considerations, and values.

In economic terms, the UAE's growing involvement in African countries poses a potential threat to the European private sector. The state-backed nature of the UAE's economic approach, akin to the Chinese model, creates an uneven playing field for European players. Abu Dhabi can substantiate economic ventures into Africa with more flexibility and its financial backing enables Emirati firms to adopt a more daring approach compared to their more risk-averse European counterparts. Interviews we conducted with European, Emirati, and African experts revealed that European players are often perceived as less advantageous investment partners compared with Abu Dhabi and other emerging investors. [5] Firstly, the UAE's streamlined procedures and shorter delays contrast starkly with the often-cumbersome processes associated with securing funds from Europe, particularly from public sources. Secondly, Emirati players demonstrate a greater risk appetite, enabling them to back projects that European companies and financial institutions might shy away from. This flexibility opens doors to initiatives that might otherwise struggle to secure funding. Additionally, the Emirati financial landscape offers softer standards regarding financial transparency, regulatory boundaries

, environmental governance, and human rights considerations compared to Europe. This leniency provides African governments more flexibility in navigating their developmental priorities while still accessing crucial financial support. It can also potentially empower African governments and companies to resist regulatory pressures from their European counterparts in the long term.

These factors mirror Europe's struggle against Chinese competition in Africa and, combined, could serve to further weaken Europe's economic influence in the continent. Over time, European companies risk missing out to more attractive Emirati offers on burgeoning markets and losing access to vital resources such as minerals. At the same time, while these features, combined with the UAE's focus on Africa's needs, make the UAE seem like an extremely advantageous partner for African countries, significant economic disparities exist between the UAE and many African countries. These imbalances could allow the UAE to exert pressure on host countries, potentially influencing their domestic and foreign policies and creating dependencies that may be challenging to overcome, similar to the situation in the Horn of Africa and Red Sea region.

Geostrategically, the UAE's expansion into strategic infrastructure across Africa also gives it leverage over important trade routes. As key shipping companies opt for circumnavigating Africa to bypass the Red Sea, UAE-managed facilities in Mozambique, South Africa, Angola, Guinea, and Senegal are becoming particularly strategic. Meanwhile, the UAE's relations with other international players on the continent, in particular China and Russia, could lead to alliances that could pose risks to European interests. Not only is China Africa's primary bilateral trade partner, it also holds a central position as the UAE's main trade, investment, and energy partner. While Europe and the US are concerned about dependence on China, the UAE sees its transactional relationship with Beijing as mutually beneficial, especially for maritime security and trade, despite some competition in specific African sub-regions and over port concessions. This is because Chinese activities in Africa bolster trade volumes, benefitting both Emirati-operated ports in Africa and the UAE's re-export hubs.

Given their consolidating relations, collaboration between the UAE and China in African energy and mineral value chains remains plausible, as seen with the recent framework agreement between EGA and Chinalco to develop an aluminum refinery in Guinea. Such a collaboration would consolidate China's dominance of global clean energy and technological value chains and undermine Europe's aspirations for autonomy in these increasingly strategic industries. Meanwhile, relations between the UAE and Russia have improved in the last two years, following Western-imposed sanctions on the latter, and the UAE is an important gateway for Russian businesses into other regions, including Africa. Russia has also become the main supplier of gold to the UAE. In addition, the two countries share allies in Africa, such as General Muhammad Hamdan Dagalo ("Hemedti") in Sudan and Khalifa Haftar in Libya. These factors combined could make it harder for Europeans to promote stability, good governance, and human rights. Both Beijing and Moscow are strategically well-positioned to deepen cooperation with the UAE in sub-Saharan Africa, as they have done in the Middle East. Their alignment, consolidated by the shared membership to the BRICS+ grouping, carries implications for security, economics, energy, and climate. Europe's disengagement from these dynamics risks adverse effects, such as a curtailing of European companies' access to resources, markets, and trade routes in and around Africa.

Finally, normatively, when it comes to climate and energy-related values, the UAE's soft stance on phasing down fossil fuels aligns with Africa's needs and growth ambitions. The allure of investments in the oil and gas sector makes the UAE an appealing economic partner for African nations seeking collaborations and investments in the sector at a time when Europeans are more hesitant to commit to long-term investments in the sector. This convergence poses challenges to Europe's approach to the energy transition and decarbonisation efforts.

More than competition

As evidenced in this policy brief, the UAE has become an increasingly influential player in Africa, driven by its robust financial resources, its need to diversify away from oil and gas, and its extensive logistics network across Africa. These developments pose risks to Europe's market access and trade routes, influence, and climate objectives.

Nonetheless, Europe still has some competitive advantages vis-à-vis Africa. Its established networks, longstanding investments, and expertise in energy sectors, coupled with advanced technology and stable regulatory frameworks, can provide a competitive edge not only as a driver of innovation but also as a provider of a stable environment for investors.

Importantly though, Europe and the UAE also have the potential to pursue complementary rather than purely competitive approaches, leveraging their respective strengths and shared interests to improve energy access and expand renewable energy in Africa, in line with African governments' own aspirations for development and stability. Trilateral cooperation between European, Emirati, and African stakeholders would also help mitigate the risks for Europe from the UAE's role in Africa.

Collaboration should set aside divergences on the path to net zero and focus on the common European, Emirati, and African objectives, which include the energy transition and economic growth. As discussed above, the EU can cooperate both on oil and gas projects of common interest and in expanding renewable energy prospects, such as by importing renewable African hydrogen, investing in critical infrastructure, and participating in financial mechanisms, underpinned by political dialogue. Cooperation in these areas can cater to each party's respective strengths: the EU and member states can provide expertise in green technologies, governance, institution-building, and regulatory frameworks that guarantee innovation as well as stability for investors. These can be complemented by the UAE's financial prowess, connectivity capacity, and growing technological capacity, as well as Africa's availability of natural resources and efforts to increase energy access. By working collaboratively in this way, they could expedite the implementation of green-related as well as infrastructural and financial initiatives, simultaneously bolstering commercial and strategic aspirations. Trilateral cooperation would also nurture the inevitable interdependencies between the UAE, Africa, and Europe, and contribute to a more cooperative international environment.

An approach that balances competition with cooperation in this way would acknowledge the need to gain a competitive edge while recognising the potential benefits of cooperation on mutually beneficial initiatives, such as accelerating innovation and sharing risks and costs. It would also challenge the traditional notion that competition and cooperation are mutually exclusive. Middle powers like the UAE have shown the flexibility to do so by engaging in variable partnerships. European players should adopt a similar approach that allows them to navigate more fluidly and thrive in an increasingly complex and interconnected world.

The benefits for Europe of such an approach should be appreciated beyond a narrow energy and climate focus. Working out a way to coordinate and cooperate with middle powers like the UAE and African countries would also signal Europe's willingness to find ways to implement the energy transition that are more acceptable in the global south, for example by taking into account the growth-climate dilemma. By pragmatically reconciling diverse visions of the energy transition, the EU and member states could work towards shared goals, while likely also regaining political influence in Africa.

Opportunities for action

The EU and its member states will require a specific framework to promote intra-EU policy discussions around this strategy, harness existing and new EU instruments, and pursue dialogue with potential partners. This approach should be led by the European Commission, alongside the EU's prominent members with large stakes in Africa and solid relations with the UAE, namely France, Germany, and Italy. This structure would combine the EU's competencies on multilateralism, partnerships frameworks, and policy harmonisation with these member states' strong bilateral relations with the UAE and key countries in sub-Saharan Africa.

The European Commission and its member states should operationalise this cooperation through a three-pronged strategy that combines diplomatic, financial, and infrastructural engagement.

Diplomatic

On the diplomatic level, the EU should spearhead high-level political dialogue, engaging member states as well as representatives from the financial and private sector to identify European technical, financial, and political skills to deploy in facing the risks and opportunities arising from the UAE's expansion in Africa.

In addition to European coordination, the EU and member states should leverage the framework agreed by the EU and Gulf Cooperation Council states to expand their dialogue on Africa with the UAE. The partnership envisages the European Green Deal and REPowerEU initiatives underpinning clean energy cooperation between the EU and the UAE, but it also conceives opportunities to extend that cooperation to third countries to work towards goals in the energy and climate sphere, including improving access to clean and affordable energy.

Individual member states should also build upon their robust relations with African and Emirati actors in order to contribute to the EU-led efforts through bilateral dialogues. For instance, building on the UAE's $100-million pledge for development projects in Africa made as part of the Rome Process, aimed at tackling irregular migration, and the UAE's interest in Italy's ambitious new plan to cooperate with Africa, the Mattei plan, the Italian government could seek stronger synergies with the UAE in the energy sector.

Financial

Forms of trilateral cooperation should be well grounded in partnerships between financial institutions to unlock both public and private funding and mitigate the finance gap that hinders African growth. They should also aim to create commercial and investment opportunities. In 2021, French state investor Bpifrance and Abu Dhabi sovereign wealth fund Mubadala signed a memorandum of understanding to support a new African private equity platform, committing €350 million to African start-ups and small and medium-sized enterprises, extending their 20-year partnership to Africa for the first time. Though not specifically focused on green finance, this initiative can serve as an example of trilateral financial cooperation that other European and Emirati financial institutions can consider.

Africa50, with its stakeholders including the European Bank for Reconstruction and Development, the European Investment Bank, and the French Development Agency, can play a pivotal role in leveraging trilateral strengths to mobilise finance alongside national development banks such as KfW and Italy's Cassa Depositi e Prestiti. Coordination could facilitate the identification, financing, and implementation of clean energy projects across the continent, leveraging initiatives like the Africa-EU Green Energy Initiative, which has recently collected pledges for over €20 billion to expand green energy production and access across sub-Saharan Africa, and the $4.5 billion Africa Green Investment Initiative launched by the UAE with the same goals.

These combined actions would contribute to tackling the green finance gaps that hinder clean energy projects in Africa while also increasing energy access across the continent, a crucial prerequisite for investments to flourish.

Infrastructure

The realisation of such ambitious plans hinges significantly on robust infrastructure, with connectivity infrastructure and electricity standing out as crucial drivers for growth and trade. The strategic importance of Africa's infrastructure is emerging as a key consideration in global geoeconomic strategies. In this evolving landscape, the UAE has assumed a pivotal role, with DP World and ADP taking a prominent role in the development of key ports and infrastructure projects across Africa. The EU can complement these efforts through Global Gateway, which provides an ideal platform for European institutions to co-develop strategic infrastructural projects along with African and Emirati partners, such as Africa50 and Emirati connectivity giants. The recent financial agreement between the European Commission and the African Development Bank within the Global Gateway framework to provide additional funding into African infrastructural projects is a step in the right direction and could be extended to Emirati actors. An EU-UAE-Africa partnership could particularly benefit the initiatives around transport corridors, which could multiply their impact if paired with Emirati infrastructural investments in ports and other infrastructure. For instance, the EU-Africa Global Gateway Investment Package identified the Maputo-Walvis Bay corridor as strategic, which could be integrated into DP World-controlled port of Maputo and the SEZ of Walvis Bay. Other opportunities could be explored in Angola and Zambia, given the UAE's heavy investments in ports and mining in these countries and the EU's plans for the Lobito Corridor to avoid duplications and prevent competition between similar initiatives.

Beyond transport infrastructure, another critical area where coordination and cooperation would be transformational is Africa's grids. The president of AMEA Power, Hussein Al Nowais, has highlighted the challenge of deficient grids in Africa, underscoring the difficulty in making profitable investments in this area. The EU, UAE, and African institutions could coordinate to focus on large strategic projects, which are likely to be impossible without joint action. A noteworthy development in this regard is the launch at COP28 of the Utilities for Net Zero Alliance, led by UAE's Abu Dhabi National Energy Company together with the International Renewable Energy Agency, and leaders from the electricity and clean energy industry including from Europe, the UAE, and Africa. This alliance's comprehensive plan encompasses capital mobilisation, supply chain de-risking, capabilities and talent building, and the facilitation of policy and regulatory support.

This development underscores the desirability for European stakeholders to collaborate with their Emirati and African counterparts. Such collaboration becomes essential to sharing the costs and risks associated with developing critical and large infrastructure in the region, difficult to realise for any given individual player. European development agencies and banks, alongside Emirati sovereign wealth funds, can play a pivotal role in promoting coordination and public-private partnerships. These initiatives can combine grants and loans to finance grid expansion and maintenance in Africa, facilitating the concurrent expansion of green energy. The joint development and management of infrastructural projects would also build partnerships, capable of reinforcing Europe-UAE diplomatic relations in the long run.

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As the EU and its member states navigate an increasingly complex and fragmented world order, they need to come to terms with the role of middle powers such as the UAE in regions of strategic importance to European economic, geostrategic, and ideological interests, including Africa. Acknowledging that co-opetition can be beneficial to advancing energy and climate goals is an important first step. Achieving the objective in COP28's declaration of tripling renewable capacity through realistic implementation steps will require a close collaboration between the global north and south. Europe needs to stand at the forefront of this collaboration, not only for its historical responsibilities vis-à-vis Africa and climate change, but also to meet its own climate goals and underpin its energy-technological transition. The UAE and Africa are very well positioned to partner with Europe in this endeavour.

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[1] Authors' in-person interview with UAE-based energy expert, Abu Dhabi, 16 April 2024.

[2] Data is based on open sources retrieved by the authors up to 31 January 2024.

[3] Data is based on open sources retrieved by the authors up to 31 January 2024.

[4] Authors' interviews with Emirati-based energy experts, online, September and October 2023.

[5] Authors' interviews with European, Emirati, and African experts, online, September 2023.

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