

MIDDLE POWER DREAMING: THE GEOPOLITICS OF ANGOLA'S EMERGENCE

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SUMMARY

- Angola is pursuing a strategy of purposeful non-alignment and is becoming an increasingly important “middle power” in the world.
- As the country’s devastating civil war and authoritarian politics recede into history, Angola’s activism within Africa and its openness to working with other countries offer Europeans new opportunities to pursue their strategic interests.
- Investment in infrastructure, energy and minerals can provide mutual benefit for both Angola and Europe. To realise this, European decision-makers must work in partnership with their Angolan counterparts and secure tangible improvements in the country.
- Angola is also avidly courting specific European states, America, Gulf states and other powers. It maintains a complex relationship with China and is keen to find new friends in the world.
- At the same time, Angola’s economic, social and political transition will remain rocky. European support can find openings to facilitate this transition—and ultimately encourage Angola’s ambitions towards middle power status.

On the cusp

Angola today is seeking to become an agile “middle power”. It is avowedly pursuing a strategy of non-alignment by balancing between competing global powers while using its oil, minerals, logistics corridors and growing diplomatic capital to become more autonomous in the world.

This marks a significant shift from Angola’s many decades of introversion, when the country focused primarily on regime and state survival rather than on regional connectivity or enabling outside powers to access its raw materials. As Angola celebrates half a century of independence from Portugal, its foreign policy is no longer fully rooted in liberation or cold war history. Instead, it is now defined by transactional pragmatism and strategic diversification. At the 50th anniversary independence celebrations on November 11th this year, President João Lourenço defended multilateralism as the only model that is inclusive and capable of bringing together all the countries of the planet in the context of great power competition. He insisted on the need to reform the United Nations system to reflect the reality of the balance of power in the world today.

For the EU, Angola’s new stance matters. The country offers a pragmatic partner for the bloc’s flagship Global Gateway infrastructure programme and critical minerals supply chains. Angola provides EU states with energy—particularly oil and, soon, gas—that helps them escape dependence on Russian, Gulf and potentially American supplies. It also embodies Africa’s growing capacity for autonomous diplomacy and African states’ demand for meaningful partnerships.

Europe is not alone in its renewed interest, however. The world of the 2020s is characterised by fragmented power. The strategic rivalry between America and China now overlaps with the assertiveness of middle powers such as Brazil, India, Turkey and the United Arab Emirates (UAE). Over the last decade, many of these countries have deepened their engagements in Angola, principally through infrastructure and energy partnerships. Long treated by external forces as an arena for influence, Africa is now emerging as a broker of competition between such powers. Angola is one of Africa’s more effective negotiators. It is a regional power with middle power ambitions—and it is on the cusp of real influence, although drags on its momentum persist, both homegrown and external.

To engage effectively with Angola, Europeans should adopt a partnership model based on reciprocal strategic interests. They should expand cooperation in green energy, digital infrastructure, maritime security and governance transparency. Angola is not a passive recipient of European policy but an active player contributing to the redefinition of Africa’s

agency in a multipolar world order. Europeans should help Angola become a middle power by being genuine partners in its domestic and regional economic development.

In search of middle power status

Middle powers are states that lack the resources to shape global norms but that can influence outcomes through mediation, coalition building or issue-specific leadership.

Angola meets these criteria on four fronts. It possesses **material assets** with a rich hydrocarbon and mineral endowment, deep-water ports and expanding logistics infrastructure. It boasts **institutional credibility**: relative to its neighbourhood, it has stable governance and now a professionalising diplomatic corps to boot. It offers **strategic utility** to external powers, thanks to its geographical location, which links central Africa to the Atlantic Ocean and to emerging Indo-Pacific routes. And finally, Angola has in recent years developed a **normative foreign policy** which includes a clear commitment to multilateralism and conflict mediation under the umbrella of the African Union (AU) and supporting regional maritime security efforts.

Why Angola matters

Angola's attractions as a partner country are hard to miss: with 1,600 kilometres of Atlantic coastline, proximity to the mineral belt of the Democratic Republic of the Congo (DRC) and transport connections linking Zambia and southern Africa to the sea, Angola occupies one of the continent's most strategic junctions. The country potentially offers supply chain security for partners around the world: it hosts 36 of the 51 minerals deemed critical for the energy transition, much yet to be commercialised.

The Lobito Corridor

Things are already moving apace. The Lobito Corridor is a major project backed by international governments including the US, the EU through its Global Gateway initiative, the African Development Bank (AfDB), multilateral development banks and the private sector. The corridor runs through central Angola from the coast to the DRC and Zambia, bringing central Africa's copper and cobalt closer to global markets. Its goals include providing an alternative to southern African routes and encouraging local processing and cross-border industrial clusters, agribusiness and tourism.

The Lobito Corridor route



Source: USGS Global Mineral Resource Assessment, ICGLR.
ECFR · ecf.eu

In 2022, Angola awarded a 30-year concession for the Benguela-Lobito railway to Lobito Atlantic Railway (LAR)—a consortium of Western companies Trafigura, Mota-Engil and Vecturis—after rejecting a Chinese bid. LAR committed \$555m to upgrade the Angolan section, with the handover by Angola finalised in July 2023. International backing has since surged. The US announced over \$560m of new funding in December 2024, including at least \$200m in private capital, bringing total US commitments above \$4bn and total G7 and international financing above \$6bn.

The EU has designated the Lobito Corridor a Global Gateway flagship project and provided grants for logistics, skills and value chains—such as €76.5m for Angola in January 2025 and €50m for agri-value chains. “Team Europe” partners report €2bn invested across Angola, the DRC and Zambia, with Italy considering contributing through the Africa Finance Corporation (AFC) and private sector mobilisation.

The Zambia–Lobito Rail Project is a greenfield branch line of the Lobito Corridor intended to connect Chingola in Zambia to Luacuano in Angola, creating a continuous route from Zambia

and the DRC to the Atlantic. US development agencies are supporting feasibility and structuring, and LAR is pursuing a \$533m loan from the US International Development Finance Corporation. Angola estimates \$4.5bn is needed to finish the cross-border line and has reported Egyptian interest in co-financing.

Zambian officials are keeping their options open and are additionally looking at upgrading a road for Atlantic access through Angola. They have also encouraged Chinese investment to upgrade the TAZARA railway, which would connect landlocked Zambia to Tanzania and be used for exports to the Indian Ocean. Chinese premier Li Qiang, during a visit to Zambia in November 2025, signed a \$1.4 billion agreement with Zambia and Tanzania to modernise the TAZARA railway. The railway was financed by China in the 1970s to facilitate copper exports and fuel imports through Tanzania. It remains a critical trade route and counters the US- and EU-backed Lobito Corridor.

Alongside new, “hard” infrastructure, EU and OECD programmes emphasise the importance of integrating “soft” systems—governance, trade facilitation and skills into Lobito-connected activity. Lobito’s importance lies in its role as a development corridor, using the railway as a spine for growth and innovation. To make it happen, Angola needs investment in physical and human infrastructure to unlock the potential. However, despite strong verbal commitments, progress remains constrained by slow disbursements, overlapping donor procedures and limited coordination among US, European and African partners. This seems to be less about politics and more about (in)effective coordination of a complex multi-stakeholder and multinational initiative.

This single project captures Angola’s importance to Europe, its economic pragmatism and its geopolitical relevance as an emerging middle power. The country exemplifies the new African pragmatism: outward-looking, sovereignty-conscious and willing to engage with all partners who respect its autonomy. But it was not always thus.

The end of ideology

Historically, many African states relied on patron-client relationships with former colonial or ideological powers. However, Angola has increasingly celebrated its own agency and is actively diversifying across Western, Asian and Gulf partners. The country is not doing this as a mere hedge—it is deliberately attempting to make the most of a multipolar world to secure its own sovereignty.

In 2002, Angola emerged from over 30 years of civil war, following the military defeat of rebel group UNITA. (A low-intensity separatist insurgency continues in Cabinda province, an exclave north of the DRC.) Until the end of the conflict, Angola’s foreign policy was directed towards

achieving this victory. The country's policy was "exceptionalist" and statist, and favoured self-reliance and bilateral over multilateral engagement.

The end of the civil war ushered in peace and a post-conflict boom, driven largely by high oil prices. However, by the early 2010s, Angola had become trapped in the inertia of a petro-state. As oil prices fell, economic growth slowed and foreign policy became increasingly dependent on Chinese credit lines.

President José Eduardo dos Santos had emerged victorious from the civil war and presided over the subsequent period of peace, consolidating power through what became known as "totalitarian presidentialism." Over four decades, he demonstrated remarkable resilience, crafting a neo-patrimonial system that rotated elites and rewarded loyalty. From the late 1990s, the elite was increasingly subordinated to the presidency, supported by a powerful security apparatus. This apparatus included the army, the Presidential Guard, intelligence services, militias and a militarised police force—all financed by revenues from extractive industries and, after 2002, by Chinese-funded reconstruction projects. Over time, power became increasingly personalised: a shadow government operated autonomously, accountable only to the president. While securitisation maintained order, it also entrenched inequality, poverty, fear and impunity.

The 2010 constitution marked a major turning point in the country's political and legal development. One of its most significant changes was the abolition of direct presidential elections—instead, the head of the party or coalition with the majority in parliamentary elections automatically becomes president. The constitution also reinforced the separation of powers, defined Angola as a democratic state based on the rule of law and guaranteed a wide range of fundamental rights and freedoms. Additionally, it recognised the importance of decentralisation, the protection of private property and the promotion of social justice. Despite these provisions, in effect the 2010 constitution consolidated executive power and reduced political competition.

In his final decade, dos Santos governed with a survivalist mentality, exploiting social and ethnic divisions and using oil rents to avoid international aid conditionalities that demanded reform. By 2016, he was ailing, while his family increasingly leveraged their positions for private gain. Dos Santos stepped down in 2017.

The MPLA governing party chose Lourenço as his successor and it retained power with 61% of the vote in the August 2017 national election. When Lourenço took office, public debt was soaring, and social discontent was widespread.

Domestic reform

Upon taking office in 2017, Lourenço pursued an ambitious campaign to dismantle entrenched patronage networks. Both at home and abroad, high-profile prosecutions and asset recoveries burnished his reputation as a reformer. The most notable case involves Isabel dos Santos, daughter of the late president, who faces multiple criminal charges, asset freezes and UK sanctions. Former vice-president Manuel Vicente remains under investigation, while firms such as Trafigura and Frank's International have settled bribery cases. The Angolan state claims to have recovered around \$5bn and continues to pursue another \$21bn.

This campaign reshaped elite politics and improved Angola's international reputation. Cooperation with foreign regulators has enhanced transparency and asset recovery, contributing to fiscal stability. Yet economic diversification remains slow, and inequality and unemployment endure, as does distrust of the government. The sustainability of Lourenço's anti-corruption agenda hinges on institutional independence. Without genuine judicial autonomy, transparent procurement and equitable accountability, it risks remaining a politically instrumental project—symbolic, but limited. Ultimately, Lourenço's campaign embodied both reformist ambition and power consolidation. By 2020, the reformist momentum had slowed. Living standards failed to improve, and Lourenço's popularity declined. Nevertheless, his presidency marked a clear break with the dos Santos era.

Angola “goes out”

The foreign policy of the Lourenço presidency represents a decisive attempt to redefine the country's international identity. Lourenço's first objective was to restore Angola's credibility abroad. This required both domestic reform (as described above) and external diversification.

Externally, Angola's guiding principle under Lourenço was (and remains) strategic non-alignment: maintaining relations with all major global power centres but rejecting exclusive association with any. Since 2017, Lourenço's administration has sought to combine pragmatic realism with soft power ambitions rooted in regional leadership and institutional reform. This has also meant shedding Angola's image as China's client.

Angola's middle power diplomacy thus rests on how skilfully it can maintain overlapping, non-exclusive partnerships. Where once Angola's external relations were dominated by exports of oil in return for Chinese credit, the Lourenço administration has assembled a portfolio of reciprocal exchanges.

Angola's diplomacy now spans five concentric circles: the AU; the Lusophone world; Africa's Atlantic seaboard, with its focus on the Gulf of Guinea (although the Luanda-based Gulf of

Guinea Commission has failed to make an impact); global emerging powers such as India, the UAE and Brazil; and transatlantic partners the EU and the US.

Each circle serves as a hedge against overreliance on any single partner and individual partners fulfil a distinct functional role in Angola's strategy. **China** is an infrastructure financier; **the EU** provides regulatory credibility, green technology and investment markets; **America** offers security and minerals diplomacy; the **Gulf states** supply capital and logistics; and **India** contributes digital know-how and south-south legitimacy. **Africa** and **Lusophone Africa** provide historic solidarity and continuity. In return, Angola exports oil, gas and minerals to its partners and wants to cooperate with others to expand its agricultural sector, industrial base and local minerals beneficiation. It accepts external capital and expertise but sets the terms of engagement to preserve policy autonomy. This distributed network of relations embodies what Angolan diplomats call “multi-partner pragmatism”.^[1]

The return of geoeconomics has been the driving force behind Angola's outward strides. Infrastructure, energy and supply chains have replaced ideology as the main instruments of power in the global setting. The country's minerals and maritime assets position it at the centre of this “geoinfrastructural” competition.

Angola's stance also reflects the broader African trend of strategic hedging. Over recent decades, African continental institutions such as the AU and the African Continental Free Trade Area have strengthened Africa's collective bargaining power. Leaders such as Lourenço—currently chair of the AU—use this platform to negotiate partnerships on a more equal footing. Chairing the AU has allowed Lourenço to frame Angola as a responsible stakeholder committed to multilateral conflict resolution and to assume a role as a pan-African spokesperson.

Angola's middle power ambitions, though, are constrained by its diplomatic architecture. Historically, Angola's foreign policy was driven by the presidency, with the foreign ministry playing a secondary role. Lourenço has sought to professionalise the diplomatic corps and devolve some authority to technocratic institutions. The creation of the Agency for International Cooperation and Investment Promotion and the reorganisation of the economic diplomacy directorate within the foreign ministry reflect this shift. Luanda's ambition is that its ambassadors rotate every three to four years, ending indefinite postings. New embassies have opened in Australia, Norway and South Korea.

Diplomatic missions in theory are now evaluated not only on political outcomes but on trade and investment results. This “commercial diplomacy” model aligns with global middle-power practices—like those used by Turkey or Indonesia, although Angola is far behind these.

From oil dependency to strategic recalibration

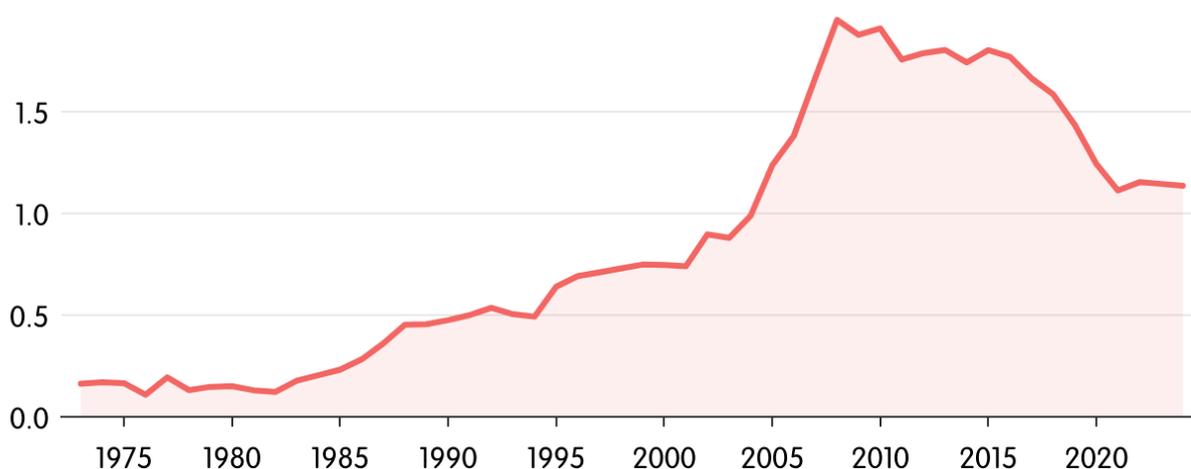
The role of energy in Angola's geopolitical transition cannot be underestimated. Angola is one of Africa's largest oil producers and, for four decades, its political economy revolved around oil. Hydrocarbons accounted for over 95% of exports and funded the vast patronage networks that sustained the ruling MPLA. During the 2000s, the dos Santos administration more seriously courted corridor investments to improve economic connections within southern Africa. Angola participated in major infrastructure projects such as the Lobito and Trans-Cunene corridors and a major regional power transmission scheme.

Nevertheless, the over-dependency remained and, after 2015, falling oil prices exposed Angola's vulnerability. This predicament prompted the incoming Lourenço government to reframe energy policy around diversification, including trying to tilt away from the energy sector into mining and agribusiness, but also trying to boost hydrocarbon exports. This strategy focuses on restoring Western investor confidence, boosting oil production, encouraging gas investments and exports and building new refineries. Lourenço has been successful in getting major players such as France's TotalEnergies, Italy's ENI, Norway's Equinor, Britain's BP and US firms Exxon and Chevron to stay and continue to invest in Angola.

In 2024, Angola decided to exit OPEC. This was an entirely political move, driven by a willingness to prioritise national production sovereignty over cartel discipline. At the time of its withdrawal, Angola's production had collapsed by almost 40% in eight years, sliding from 1.7m barrels a day to 1.1m. The decline owed less to OPEC strictures than to geology and high government financial intake: mature fields were running dry and new investment had slowed. The government stopped publishing official output figures after November 2023, just weeks before its departure from OPEC. However, because Angola refines very little oil domestically, all the production is offshore and seaborne shipments mirror total output—and can be tracked.

Currently, free from production quotas, Angola maintains output at around 1m barrels a day. This helps the government target fiscal stability while also scouting for new investors for onshore blocks under its 2026–2030 licensing round. Angola now aims to grow production beyond 1.1m barrels per day, supported by onshore exploration and a 2026-2030 licensing plan. It has introduced reforms such as the 2024 Incremental Production Decree, which cuts royalties, caps profit shares and eases cost recovery, spurring new investment. In 2025, Shell returned to Angola after a 20-year absence, committing to explore and develop three offshore blocks and ultra-deep-water blocks. This signals renewed global confidence in finding new oil and gas reserves, mirrored by new entrant Afentra, which is reviving onshore output in the long-dormant Kwanza Basin.

Angola crude oil production. 1973-2024, in million barrels per day



Crude oil production including lease condensate

Source: EIA
ECFR · ecf.eu

However, in October 2025 the IMF cut its growth projection for Angola from 2.4% to 2.1% for this year and next. The slowdown is linked to the performance of the oil sector, which still dominates the national economy. Angola's broader economic outlook and, by extension, its international ambitions remain tightly tied, for now, to the international oil price.

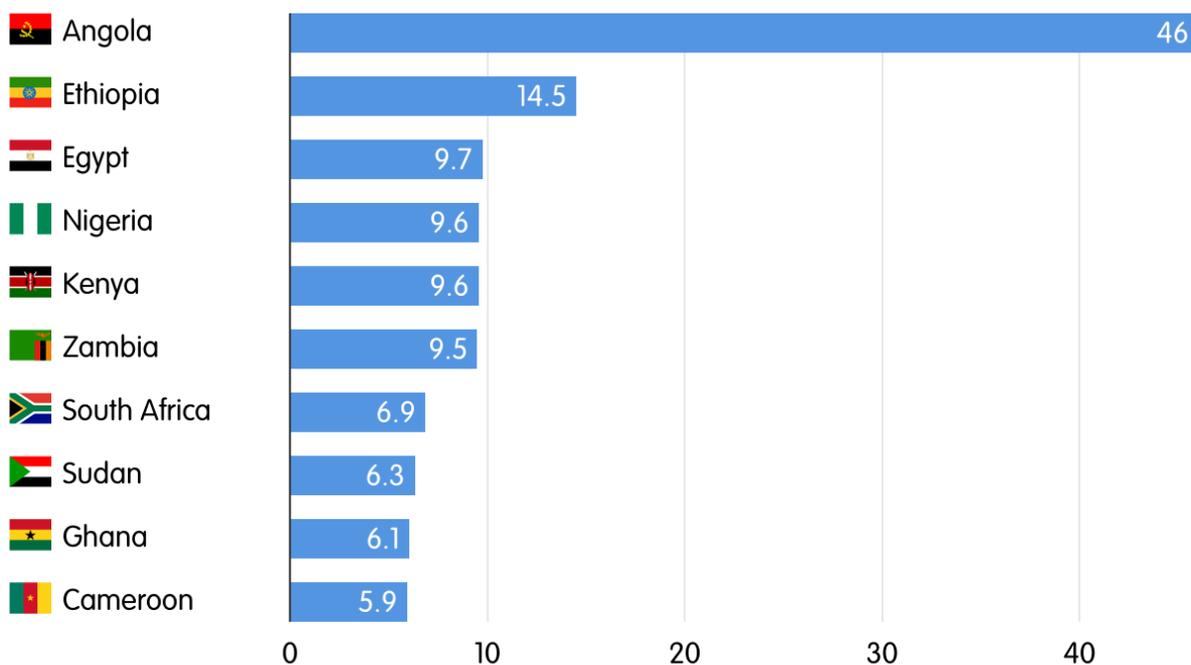
China and current diplomacy

China remains an important partner, but no longer dominates Angola's bilateral relations. Today, Angola is the fourth largest exporter of oil to China: in 2024, it sold approximately \$14bn worth of crude oil to China—51.91% of its total crude oil exports for the year, making China its largest oil buyer. But Angola is both the largest borrower from, and most indebted to, China of any African state—although this debt exposure is improving.

The World Bank coined the term “Angola model” to describe the practice of securing loans against future oil exports, which Angola began after 2004 and continued all the way until 2017. The fiscal hangover from oil-backed loans was enormous. Angola's debt to China stood at around 40% of its total public debt in 2024. While specific figures fluctuate, sources indicate Angola's overall public debt was around 65-70% of its GDP for 2024, with debt to China making up about 26-28% of GDP. About three-quarters of this is owed to the China Development Bank with smaller amounts owed to the China Exim Bank and ICBC, China's largest lender.

In 2021, the end of China’s debt service suspension forced Angola to resume payments on its debt, tightening constraints further. Debt relief and cancellation became a priority for the Lourenço administration, as did diversifying external partners away from a dependence on China. The debt-service-to-revenue ratio remains high and constrains Angola’s fiscal room for manoeuvre. The government had signed up to the G20’s debt service suspension initiative, but debt services still represented more than 55% of the state budget in 2024.

Top recipients of Chinese loans in Africa. 2000-23, in \$bn, unadjusted



These figures are based upon loan commitments, and should not be regarded as equivalent to African government debt, as a portion of signed loans are not disbursed, and a significant portion have been repaid as scheduled

Source: Boston University Global Development Policy Center. 2024. Chinese Loans to Africa Database. ECFR · ecf.eu

The Lourenço administration has shown a willingness to push back against China despite the importance of this partnership. For example, when Beijing sought compensation in exchange for deferring debt repayments—reportedly requesting long-term rights to operate the strategic Benguela railway or port facilities—the Angolan government rejected the proposal and instead offered additional offshore oil equity to Chinese oil company CNOOC. The government also used its anti-corruption campaign to strengthen its negotiating position during debt relief talks with Beijing, targeting assets held by the opaque China Sonangol and China International Fund.

These efforts appear to have yielded tangible results but have been slowed by lower oil prices. (Europe could support these efforts by coordinating with Angola under the G20 Common

Framework principles to ensure comparability and fairness with all creditors. This could help Angola redefine its relationship with China from that of debtor and creditor to genuine partners in industrial and energy development.)

With global oil prices now below the government's \$70-per-barrel benchmark for 2025, and debt service payments for the year projected at \$9.1bn, Angolan officials are now having to reappraise their debt repayment schedule to China and are engaging in slower repayments. They signalled in October that they will probably wipe out all Chinese debt by 2029 (a year longer than projected at the beginning of the year).^[2]

China is still Angola's largest trading partner, but the composition of the relationship has changed. In signs of growing Angolan freedom of manoeuvre, infrastructure loans have shifted to concessional terms with longer maturities and Chinese firms now operate joint ventures in manufacturing, construction materials and telecommunications. That said, a €231m loan in 2023 funded nationwide broadband expansion, a deal symbolically linked to the fortieth anniversary of Angola–China diplomatic relations and featuring long-maturity terms of up to around 20 years, pointing to continued cooperation.

For Angola, the objective is to retain Chinese financing while avoiding dependency. For China, maintaining goodwill with Angola is important as a key African oil supplier and recipient of significant Chinese infrastructure investments and, now, defence support. The relationship is being rebranded as what might be described as a “mature partnership”, focused on technology transfer and local employment. In essence, China remains important, but is no longer as dominant as it once was.

Angola's rising private borrowing

Angola's oil collateral has allowed it to borrow regularly from commercial and private lenders, increasingly American and European, as part of its diversification drive. It stands in good stead in this area as it has never defaulted on repayments for such loans.

However, the country's capacity to repay its debts depends on global oil prices and a pick-up in mining sector activity (driven by increased diamond production) and the gas sector. Additional foreign currency liquidity will come from an agreed \$1.5bn Eurobond issue in late 2025. In December 2024 the Angolan authorities issued

Treasury notes on the London Stock Exchange worth \$1.2bn. The notes are medium-term debt instruments, due to mature in 2030 with a coupon rate of 10.95%, which is expensive compared with the interest rate of 8.75% at which the previous ten-year Eurobond was issued in 2022. In fact, Angola paid the highest interest rates on new debt in 2024.

Domestic debt is about \$14bn, with the UK being one of the main creditors. The latest Eurobond mostly attracted US and UK investors. Angola is also evaluating “alternative bond options, such as Panda, Samurai or sukuk bonds” to attract investors from Asia and the Middle East.

The growing importance of gas

Angola’s gas sector remains underdeveloped—but this also means significant untapped opportunities remain across both production and processing. The country holds an estimated 11trn cubic feet of proven natural gas reserves, compared with a total gas output of 2.3bn cubic feet a day as of October 2024—most of which is extracted as a by-product of oil production.

Since the 2022 energy crisis following Russia’s all-out invasion of Ukraine, Angola has redirected most of its liquefied natural gas (LNG) exports to Europe. In 2023, Europe received 75% of Angola’s LNG exports, with France and Britain the primary recipients. This is a significant shift from Angola’s previous focus on China and makes Angola a strategic source of gas for Europe.

In support of its economic and geopolitical diversification efforts, in October 2024, Angola released a national gas masterplan for public consultation, outlining strategies to expand the sector and attract new investment. The government regards increased gas demand from Europe (as part of European efforts to diversify supplies away from Russia, the Middle East and the US) as a market opportunity that could bolster its expansion of LNG investments and support increased exports of Angolan gas.^[3]

Angola plans to increase processing capacity at its LNG project starting in 2025. This decade-old venture is a joint project between Sonangol—Angola’s state-owned oil company—Chevron, TotalEnergies and Azule Energy (a partnership between ENI and BP). However, the planned expansion of LNG is expected to bring operations up to full capacity by 2026, strengthening Angola’s export earnings and economic growth prospects.

Minerals diplomacy

Angola is already a world leader in diamonds, but it is increasingly a producer of minerals in its own right, such as copper and rare earths. Asian, South and North American, European and Middle Eastern investors are funding their exploration and mining development.

Angola's minerals diplomacy seeks to balance extraction with sovereignty. Its policies appear to follow three broad principles:

1. **Local beneficiation.** Angola makes the issue of export licences conditional on securing local processing or joint-venture investment. It aims to generate jobs, improve in-country skills and support domestic economic growth.
2. **Transparent frameworks.** In 2023, Angola revised the Mining Code to introduce public tenders and environmental standards, thereby aligning with OECD norms.
3. **Diversified markets.** Angola distributes supply contracts among Asian, Gulf and Western buyers, and in so doing avoids overexposure to any single bloc.

These policies mirror broader African efforts to reclaim control over resource governance—placing Angola alongside Botswana, Namibia and Zambia as leaders of the “new extractive sovereignty” movement.

Over the last decade, Angola has encouraged investments in mineral extraction and exploration. Its Pensana rare earth mine is one of the world's largest and contains the highest-grade magnet metal rare earth deposits. Angola will also shortly start production at its first large-scale copper mining project, the Tetelo mine. This marks a major step in diversifying its oil-dependent economy into the clean energy minerals sector. Copper deliveries are projected to begin in early 2026, with Glencore securing a \$37m deal for a year's supply, outbidding Trafigura. The project is a joint investment between Angolan (49%) and Chinese (51%) partners.

The government is also seeking to acquire direct control of key mining assets, to strengthen its hand in international markets. For example, it has launched a bid to acquire Anglo American's entire 85% stake in De Beers, which is a sharp escalation from its earlier plan to buy only a minority share. The move is led by Angola's state-owned diamond company, Endiama, and comes amid Anglo American's plan to divest from De Beers. The proposal, described as “concrete and well-defined”, reportedly targets De Beers' advanced mining technology. The rivalry underscores shifting power dynamics in the diamond industry, as Angola recently surpassed Botswana as Africa's top diamond producer by value for the first time in two decades. This further demonstrates its middle power ambition on the world stage.

Russia and Angola

President João Lourenço is a former army general, and statements by the Russian ambassador to Angola claim that more than 27 Angolan generals have received training in Russian military academies.

However, Lourenço's military training in the Soviet Union does not appear to have given Russia many inroads into Angola, where it has lost market share in recent years. Russian diamond maker, Alrosa, was forced to sell its Angolan diamond investments to an Omani firm due to Western sanctions. Russia's previous monopoly of defence sales has collapsed in the face of agreements reached with Angola by the UAE, France, China and Turkey. In early 2025, Lourenço approved the disbursement of \$36m for the acquisition of military equipment and assets from the China National Aero-Technology Import & Export Corporation. At the same time, Angola's partnership on satellites widened to include Europe. Looking to reassert itself, in April 2025 Russia announced the Angolan president would visit Russia soon. (Lourenço last visited Russia in 2019 and discussed diamond mining, gas and oil production, space and agriculture.)

In August 2025, Angolan intelligence arrested two Russian nationals working for the Africa Politology outfit (now linked to the Africa Corps, formerly Wagner) for allegedly engaging in disinformation operations inside Angola, encouraging protests and gathering intelligence on the Lobito Corridor and politics in the run-up to the national election in 2027. Several Angolans were also detained, including an opposition UNITA supporter. The case has become politicised, but it suggests Moscow is alarmed by its comparatively declining influence under Lourenço and is seeking to cultivate new pro-Russia supporters. It also suggests the Angolan government is concerned enough about Russian activities to allow some detailed information about these detentions to be leaked to the press.

Angola and Europe

After a decade of relative inactivity, Angola and the EU have entered a new era of pragmatic cooperation. Angola's hosting of the EU-AU summit in Luanda in November 2025 is a statement of Luanda's intent.

For the EU, engaging with Angola satisfies three strategic imperatives. The bloc is attempting to diversify its access to raw materials away from Russia and China, having become sharply dependent on them; it wants to project a model of “equal partnership” distinct from extractive investment—to distinguish itself from China; and it hopes to demonstrate the EU can deliver tangible outcomes.

For Angola, the partnership with the EU offers something equally valuable: reputational capital. Association with European regulatory standards in energy, infrastructure and mining enhances investor confidence and strengthens Angola’s image as a credible reformer. Yet Luanda carefully limits normative dependence; it welcomes European technology and finance but resists political conditionalities on governance or human rights.

Both sides recognise the asymmetry in economic scale but frame cooperation as mutually beneficial.^[4] Their policies reflect this: for example, the blended finance model of the European Investment Bank (EIB) allows Angola to access concessional rates without surrendering policy space.

EU-Angola Joint Way Forward

After the end of Angola’s civil war in 2002, the EU initially failed to seize the opportunity to become a key reconstruction partner, in contrast to China’s efforts. However, the EU still became an important donor and allocated more than \$250m to the 2008–2013 cooperation programme. In 2012, European Commission president José Manuel Barroso visited the country, marking a significant turning point. This accelerated efforts to establish the Joint Way Forward (JWF), a cooperation framework signed in July 2012.

The JWF signalled a deepening of ambition between the EU and Angola. Conceived as a high-level political framework, the JWF sought to transcend the traditional aid-based model that had historically characterised EU-Africa relations. The framework is still operational and covers a range of cooperation areas, including governance, human rights, economic diversification, regional integration, and peace and security. By institutionalising dialogue at both the political and technical levels, the JWF sought a more structured and strategic relationship between the EU and Angola.

Importantly, the JWF laid the groundwork for subsequent agreements. Among these is the 2023 EU-Angola Sustainable Investment Facilitation Agreement (SIFA). The SIFA aims to provide European investors with legal certainty and promote environmental, labour and transparency standards. It is the first such accord between the EU and an African state (indeed, that the EU has concluded with any state). It could serve as a prototype for future arrangements with African states.

Global Gateway and European infrastructure investment

As well as presenting a strategic opportunity for the EU, Angola is also a test of the bloc's credibility. As the flagship project of the EU's Global Gateway initiative in Africa, the Lobito Corridor is a proof of concept that European infrastructure partnerships can compete with or complement China's Belt and Road Initiative. Many Chinese-led infrastructure projects provided little value addition or job creation, although some do. The EU emphasises logistics and energy infrastructure along the Lobito Corridor with the aim of achieving lower production and export costs for Angolans, showcasing the local benefits of EU investments.

Through Global Gateway funding, European partners—including the European Commission, the EIB and EU member states working under the “Team Europe” framework—are investing in major renewable energy, water management and digital infrastructure initiatives with partner countries. Key efforts include the Africa-Europe Investment Package, which mobilises up to €150bn for projects such as clean hydrogen development, large-scale renewable energy expansion, improved digital connectivity across the African continent, and the Angeo-1 Earth-observation satellite (developed with Angola in partnership with Airbus). Together, such projects strengthen sustainable development abroad while supporting the EU's broader goals of climate diplomacy and long-term strategic autonomy.

The EU-US-AfDB package to rehabilitate the Benguela railway (which runs along most of the Lobito Corridor) and expand the Lobito port network is designed not only to enhance trade logistics but also to demonstrate a model of sustainable infrastructure development. European firms such as Mota-Engil and Trafigura already hold long-term concessions to operate the corridor, positioning Europe at the heart of one of Africa's most strategic transport routes. At the same time, the EU is exploring the creation of downstream industrial hubs in Lobito and Huambo to localise parts of the battery and green technology value chains that currently leave Africa unprocessed. These initiatives aim to retain more value within the continent and link African resources more directly to Europe's clean energy transition.

Energy

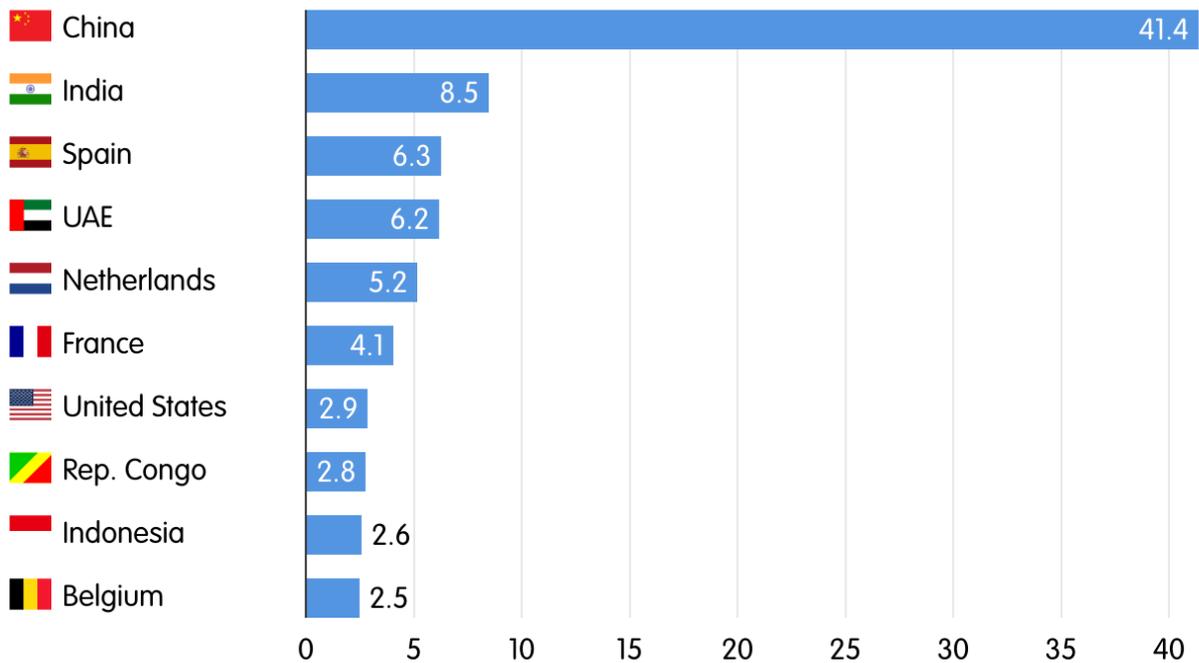
European companies play a defining role in Angola's energy ecosystem. Through Azule Energy, Europe maintains a leading position in developing Angola's deep- and ultra-deep-water resources. Meanwhile, TotalEnergies operates several major offshore blocks and is expanding into renewables. European engagement also extends to the power and clean energy sectors: Siemens is modernising Angola's power grid and Conjuncta is developing green hydrogen projects.

Such European efforts align with the Angolan government's ambition to use hydrocarbon revenues to finance diversification in agriculture, renewables and industry—areas where European expertise could translate into lasting political and strategic influence. Success depends on aligning EU priorities with Angolan realities. At this early stage, it is difficult to say how much success the EU has met with. The challenge now lies in implementation: ensuring that EU projects deliver visible employment and capacity building rather than repeating donor-driven patterns of the past.

Hopes of adding mineral value may be unrealistic for many European countries, whose mining industries are undeveloped. France and Italy are looking too at how to enhance agricultural investments along the Lobito Corridor—with an eye on regional and international markets. In late January 2025, Angola signed cooperation and investment agreements worth \$473m with France. As part of the agreements, France committed to investing in Angola's agricultural, security and health sectors, among others. France regards Angola as an important economic partner on the continent as it seeks to diversify its own relations away from Francophone Africa.

Amid the withdrawal of US government aid under the second Trump administration, stronger ties with European countries further support Angola's investment and development ambitions and economic diversification. France has promised more funding for agriculture to assist Angola's economic diversification efforts.^[5]

Key Angola export destinations. 2023, in %



Source: OEC
ECFR · ecf.eu

Diversifying outward

The United States and strategic minerals diplomacy

During the cold war, Angola was a one-party, Marxist-Leninist state, allied to the Soviet Union and Cuba. Government forces fought a long civil war against UNITA, which was supported by apartheid South Africa and the US. (UNITA was the second largest recipient of US covert aid after the Afghan mujahideen until 1992, poisoning relations between Washington and Luanda.)

The tide began to turn in May 1993, when President Bill Clinton formally recognised the government elected in Angola's first-ever multiparty elections. Chevron and Exxon have prospered in the country since, and Angola was an important source of oil imports for America. That continued until 2006, when this trade plateaued and then sharply declined following the US shale boom.

Luanda's subsequent relationship with Washington has been patchy. At the end of the civil war, the Angolans complained to a senior American official that the US supported an international donors conference for Afghanistan, but not for Angola.^[6] The reply, reportedly, was blunt.

Bilateral relations with America cooled, and Angola sought diplomatic and economic relations with China. (This decade, examples of Luanda's greater distance from Beijing and Moscow include its vote in favour of the 2022 UN General Assembly resolution condemning the Russian annexation referendums in Ukraine.)

However, Angola's strategic importance to America has increased in the last five years, for two main reasons. Firstly, Lourenço's ascendency to the presidency in 2017, which led to Angola's shift towards pragmatic multipolarity.

Secondly, Angola's strategic location is important for America. In December 2024, President Joe Biden made a historic visit to Angola—the first ever by a sitting US president—to strengthen economic ties and highlight his country's support for Africa's growth. His trip focused on the Lobito Corridor and aimed to boost trade and access to critical minerals. Angola subsequently co-hosted the US-Africa business summit in June this year and used that platform to advance Africa's interests in infrastructure investment. These efforts may yet bear fruit: America will probably extend some trade concessions to Angola—an initial US reciprocal import tariff of 32% on Angolan goods was revised down to 15% in late July. More concessions are likely given the keen US interest in strengthening bilateral relations.

Nevertheless, the unpredictability inherent in the current US administration means America risks being perceived as an unreliable investment partner. The Angolan elite may yet deepen ties with alternative partners, such as European countries, and even return to China and Russia. The US could also try to deny Chinese mining firms the use of the Lobito Corridor, but this would cause a stand-off between Luanda and Washington. Nevertheless, for now, the two countries have institutionalised annual strategic dialogues covering energy, defence and governance reform; transactional pragmatism prevails.

Emirati capital and connectivity

New sources of foreign direct investment are essential to Angola's middle power ambitions. A partnership with the UAE is a key part of this. Indeed, the UAE has become Angola's most dynamic new partner. For instance, AD Ports has invested up to \$379m in Luanda's multipurpose terminal; EDGE Group cooperates on naval modernisation; and sovereign funds from Abu Dhabi and Dubai are financing agro-industrial zones and renewable projects. President Mohammed bin Zayed's first state visit to Angola in August 2025 was accompanied by investment pledges and sectoral memoranda, with an ambitious goal to triple trade to \$10bn a year by 2033 (up from about \$3bn in 2023).

Through entities like EDGE Group, the UAE has also secured a significant contract to build naval corvettes for Angola. Defence ties with the UAE complement Angolan efforts to modernise

the navy and coastguard. Emirati-built corvettes and French landing craft now patrol the Atlantic littoral—symbolising Luanda’s ambition to project maritime power across the Gulf of Guinea.

This influx of Gulf capital offers Angola rapid financing without conditionality, access to logistics expertise and the chance to act as a bridge between African and Middle Eastern markets. However, the model carries risks of opacity and debt concentration. The danger to Angola is that it fails to institutionalise transparency standards before partnerships with Gulf states end up replicating the unaccountable patterns of earlier Chinese loans.

India and digital development

India is one of Angola’s top oil importers, purchasing nearly \$4bn worth of goods—mostly crude oil—in 2023. As with the UAE, strengthened ties with India will help Angola diversify its hydrocarbon export markets, increase its sources of development financing and broaden its defence partnerships.

Angola’s recent outreach to India underscores its efforts to forge new partnerships within the global south. At their shared May 2025 summit, Lourenço and Indian prime minister Narendra Modi signed agreements worth \$200m covering digital public infrastructure, e-governance and vocational training. In November 2025, Indian president Droupadi Murmu visited Angola, marking the first such state visit as she attended the celebrations of 50 years of independence. During this visit, both nations committed to deepen cooperation in energy, critical minerals, infrastructure, defence and skills development. India had already extended a line of credit for renewable energy and irrigation projects, along with an additional \$200m credit line to support Angola’s defence forces.

The partnership with India provides three key benefits. It helps Angola achieve a form of technological leapfrogging, securing greater access to digital identity and payments systems, and supporting administrative efficiency and financial inclusion. In the energy and diamonds sectors, joint ventures in oil exploration and diamond processing deepen industrial integration beyond the trade in raw materials. And finally, a closer relationship also supports Angola’s broader soft power realignment. Cooperation within the G77 and the Non-Aligned Movement reinforces Angola’s narrative of sovereign modernisation.

Angola’s emerging network

Taken together, these relationships form a diversified matrix of interdependence rather than a hierarchy of dependency. Angola’s diplomacy functions through constant recalibration:

Angola's matrix of interdependence		
Partner	Strategic function	Instruments of engagement
EU	Regulatory credibility; green transition	SIFA, Global Gateway, EIB finance
US	Minerals and maritime security	Partnership for Global Infrastructure and Investment, Lobito Corridor
China	Infrastructure and industrial base	Concessional loans, joint ventures
UAE	Capital and logistics	Port and defence investment
India	Digital transformation	Credit lines, technology cooperation

This multi-vector framework exemplifies the logic of twenty-first-century middle power diplomacy: resilience through redundancy, where each partner offsets the vulnerabilities of another, allowing Angola to navigate a fragmented world with remarkable agility.

The Atlantic and Lusophone worlds

Angola has historically maintained strong partnerships with the Lusophone world and countries that showed it solidarity during the cold war. It still leverages these relationships, and now does so in support of its middle power aspirations. Angola's membership of the Community of Portuguese Language Countries continues to provide soft power reach into Europe, Latin America and Asia. Portugal remains its key cultural and financial interlocutor with the EU, while Brazil serves as an ideological mirror for "south-south diplomacy".

Brazil and Angola share a particular deep historical relationship rooted in the Portuguese language, cultural ties and Brazil's role as the first country to recognise Angola's independence in 1975, which established a foundation of trust and long-term cooperation. Over time, the partnership has expanded well beyond diplomacy, with trade growing steadily—Brazil exported \$492.6m to Angola in 2024, while Angola's exports to Brazil reached \$1.12bn. Today, both countries are strengthening collaboration in energy, infrastructure and technical capacity building.

In early October 2024, Angola also joined the Francophonie as an official observer, and Lourenço visited Paris in early 2025, following President Emmanuel Macron's visit to Angola in 2023. Furthermore, the government has indicated it would like to join the Commonwealth. These are examples of Angola seeking to broaden its membership in multilateral forums to enhance its middle power ambitions.

More recently, Angola joined the Partnership for Atlantic Cooperation, launched by the US in 2023, thus placing itself within a broader southern Atlantic community spanning Africa and Latin America. This participation underlines Luanda's ambition to bridge regional divides and to redefine the Atlantic as a multipolar, rather than transatlantic, space. It is driven by Angola's ambition to become a key naval middle power in the Gulf of Guinea.

Angola within Africa

In recent years, Angola has increasingly played the role of mediator in high-stakes diplomacy in its region. Its most visible diplomatic efforts lie in the Great Lakes region. Since 2022, under the AU-backed Luanda peace process, Angola has mediated between the DRC and Rwanda on the issue of M23 rebel incursions. It succeeded in bringing leaders of both countries to the negotiating table. Angola stepped back in January 2025 to focus on the AU as its chair. Lourenço continued to preside over the inter-governmental International Conference on the Great Lakes region until November 2025, when he handed the leadership to the DRC's president, Félix Antoine Tshisekedi Tshilombo.

Angola has supported UN and regional peacekeeping and maritime security missions, and chairs regional dialogues on the energy transition within the Southern African Development Community (SADC) and the AU. These roles provide international legitimacy that compensates for Angola's limited economic and human capital scale. They also make it an indispensable partner to those seeking stability in central Africa.

Within SADC, Angola's diplomacy has shifted from a stance of revolutionary solidarity to embodying economic pragmatism. Its nationalist, liberation alliances with Namibia and South Africa remain, but it has moved its focus towards corridor development, energy interconnection and maritime cooperation. For example, Angola's navy now participates in joint patrols in parts of the Gulf of Guinea as; Angola is part of Zone A under the Yaoundé Code of Conduct maritime security architecture. It coordinates regional responses to piracy and illegal fishing as the host of the Gulf of Guinea Commission. Maritime security in the Gulf of Guinea directly affects European trade routes and there is regular cooperation between European nations and Angola.

Angola's corridor diplomacy

At the continental level, Angola promotes what its diplomats describe as “corridor multilateralism”.^[7] Rather than pursuing grand pan-African unity projects, Luanda focuses on practical integration through logistics and energy corridors. Importantly, the Lobito Corridor anchors Western and multilateral financing through the Global Gateway and the G7's Partnership for Global Infrastructure and Investment.

Angola also has plans for a Southern Corridor to transform the Port of Namibe and the Moçâmedes Railway into a major regional logistics hub. The proposals include extending the railway network to Namibia and Zambia, which would enhance cross-border trade and connectivity. The Angolan government is preparing an international tender to concession the infrastructure to private investors. This effort forms part of a broader national strategy to position the country as a regional trade hub. In doing so, Angola is turning infrastructure into diplomacy—unlocking regional trade and transforming its geography into a bargaining chip within the global energy transition.

Drag factors on Angola's middle power momentum

Angola's Achilles heel for its middle power ambitions remains its over-dependence on oil exports, as well as the shortage of quality jobs available for ordinary Angolans and a tight pool of skilled labour. Angola also has a particularly acute demographic youth bulge. The latest United Nations Human Development Index ranks the country 148 out of 193. What happens internally could represent the biggest challenge to its ability to act externally.

Economy and society

IMF-supported reforms between 2018 and 2021 stabilised macroeconomic indicators but intensified austerity. Although higher oil prices in 2022 briefly boosted revenues, Angola's structural weaknesses persisted. Crude oil makes up 95% of exports, provides 60% of government revenues and supports roughly three-quarters of economic activity, according to IMF data. The non-oil private sector continues to struggle under bureaucratic constraints, limited access to credit and pervasive corruption.

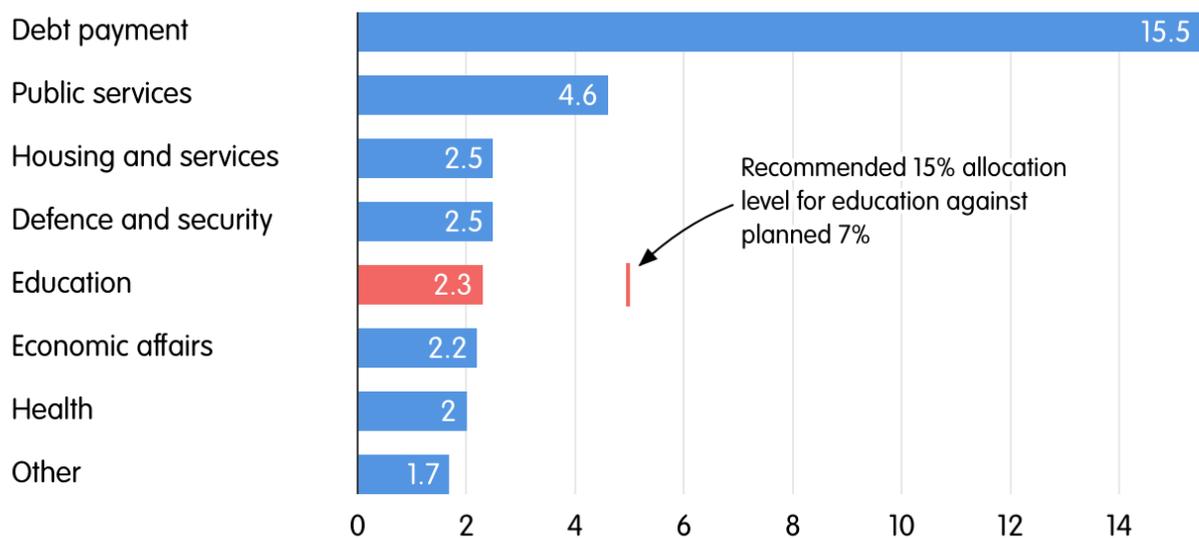
In 2023, Angola's population was estimated at 36.7 million people, but this is projected to double to 72.3 million by 2050. Highly uneven income distribution means purchasing power is very low, as are education levels. Despite sustained government efforts to expand schooling and train more teachers, a quarter of Angolans aged 18-24 have no formal education; this figure rises to 54% among those aged 25-64. Within this adult group, fewer than 3% have completed

higher education, and only 16% have finished primary school. With most health indicators also lagging, labour productivity remains weak, and skills shortages—particularly of experienced workers—are evident across all sectors of the economy.

Angola’s population is also overwhelmingly young, and 8 million children live in extreme poverty. Two-thirds of Angolans are aged under 25 and half of its 14 million registered voters are under 36.

Youth unemployment stands at nearly 60%—a social and political time bomb. Frustration is fuelled by persistent inequality between Luanda’s and other urban elites and impoverished peri-urban areas. Despite modest progress in education and health, living standards have stagnated. Civil society activism—once constrained—is now increasingly vocal, using social media to challenge state narratives. Education has endured massive underinvestment: in 2024 it represented 6.4% of the total budget, far below the recommended 15%.

Angola budget spending. 2026 projection, in bn Angolan kwanza



Source: Liga do Investidor
ECFR · ecf.eu

This economic and demographic situation is contributing to political strain. The Angolan population’s youthful profile means that many people have little or no memory of liberation or even the civil war. Voting patterns suggest urban voters increasingly distrust official institutions. Afrobarometer surveys in 2019 and 2022 show that only around 40% of Angolans view their country as a functioning democracy, and satisfaction with democratic performance remains below 20%. A 2024 survey found most Angolans believe corruption to be on the rise and regard government efforts to combat it as insufficient. A September 2025 Jeune Afrique

survey found stinging disavowal of Lourenço, and an even stronger disapproval of the government: only 14% of Angolans count on their government to contribute to the development of their country, while 52% say they have absolutely no confidence in it to improve their collective destiny.

Rising tuition fees, lack of employment and deteriorating facilities have triggered recurring student protests, including in 2025. Inflation in basic goods and persistent inequality have also eroded the government's urban support base. In July, thousands of protestors stormed the streets of Luanda to express their frustration over diesel price increases. The protest was quickly contained by the police but underlined deeper public frustration over economic hardships.

Governance and the anti-corruption paradox

Despite reforms, Angola's bureaucracy retains a rent-seeking culture. Procurement remains opaque, and local governance structures lack resources. State capacity outside Luanda is thin and corruption persists. The modernisation of public administration depends heavily on foreign consultants. This weak institutional depth impedes ambitious infrastructure projects and donor programmes.

Lourenço today controls Angola's ruling MPLA, the executive and the security apparatus, while also appointing senior judges and parastatal heads. His policies are politically calculated: Lourenço's anti-corruption campaign sought to consolidate his authority by rebuilding MPLA support ahead of the 2022 election, reforming the oil industry, reducing debt and diversifying the economy. Expecting a second term (and for a while with an eye on a third), Lourenço had orientated all major decisions towards securing electoral victory and political dominance.

Critics contend that corruption enforcement is selective, targeting opponents while protecting loyalists. The judiciary remains susceptible to executive pressure, and parliamentary oversight is weak. Thus, despite improving Lourenço's international standing, the domestic governance impact of his campaign is limited. The Banco Nacional de Angola estimates \$30bn of Angolan wealth is held abroad, half in private accounts. A 2018 repatriation law required the return of illicit funds above \$100,000, offering amnesty until year's end. Some assets were returned, and convictions followed.

In his 2025 State of the Nation address, Lourenço reported \$7bn had been recovered and \$12bn seized domestically and abroad. He criticised limited international cooperation—particularly from Switzerland—in repatriating stolen funds.

However, former Angolan government officials point to the case of Omatapalo-Engenharia & Construção—a Portuguese-Angolan construction group that has secured multi-million-dollar state contracts in Angola.^[8] Investigations by American authorities describe Omatapalo as “a company linked to João Lourenço” and note that it was awarded at least three state projects valued at over \$450m. The firm also features in recent large-scale renewable energy and infrastructure deals involving US agencies, reflecting its elevated status and presumed proximity to Angola’s executive leadership.

While formal accountability mechanisms have improved, enforcement still follows political loyalties. Paradoxically, the reforms have reinforced Angola’s securitised state: former generals now dominate governance, ensuring continuity but curbing democratic oversight. This transition replaces one elite network with another, rather than achieving systemic transformation.

The potential of pluralism

The death of dos Santos in 2022 exposed deep factionalism within the MPLA, as disputes about his legacy mirrored broader struggles over financial and security control. Lourenço’s authority now depends on balancing old-guard generals, reformists and emerging technocrats. Though Lourenço has introduced limited reforms—such as modest decentralisation efforts—the core structures of centralised power endure. Promised local elections have been postponed, largely due to fears the MPLA might lose provincial strongholds. Administrative changes, including the creation of new provinces and municipalities, appear aimed more at maintaining control than enhancing governance or democracy. Angola has not also released the final, official results from its most recent 2024 census, a delay which may be politically motivated.

However, years of economic stagnation have eroded the party’s patronage networks. UNITA’s resurgence under leader Adalberto Costa Júnior transformed the 2022 election into the most competitive in Angola’s history. Despite a narrow MPLA victory—amid record abstention and allegations of manipulation—the results signalled a gradual erosion of one-party dominance. In Luanda, home to over a quarter of Angola’s population, UNITA actually won outright. Diaspora voters, participating for the first time, also favoured the opposition. While the MPLA remains strong in rural and southern regions, its national hegemony is now contested.

This erosion of one-party dominance may be Angola’s most consequential political development since 2002. It signals a slow, uneven shift towards pluralism, albeit within a still-restricted system. UNITA is capitalising on popular discontent over employment and there are signs of self-doubt among the fragmented MPLA—with asset accumulation still ongoing outside the country.^[9]

Lourenço has denied he holds ambitions for a third term, and a succession race is under way to choose the MPLA candidate for the 2027 presidential election. The opposition has raised concerns that the MPLA will use the advantages of incumbency to obstruct a credible electoral process and is advocating constitutional reform. Angolans fear significant urban street protests if the MPLA prevails again at the polls, and there are no guarantees the gains of the Lourenço era will last. A retreat from multipolarity and a return to greater ambivalence towards Europe and the West could stunt domestic process, given the close intertwining of foreign and domestic policy.

These vulnerabilities limit the depth of Angola's external commitments. They also illustrate the paradox of an aspiring African middle power: the more the state projects outward, the greater the strain on its internal foundations in the absence of meaningful poverty reduction.

Recommendations for Europe

Manage expectations

European policymakers should recognise Angola's agency. Conditionality-heavy rhetoric on democracy or human rights can backfire, pushing Angola to prefer to work with less prescriptive partners. The EU and like-minded European nations should instead emphasise mutual accountability, linking governance improvements to tangible benefits in investment and capacity building.

A balanced approach would entail supporting institutional capacity by providing technical assistance to ministries implementing SIFA and corridor projects. European actors should also prioritise visible impact—job creation, training and local supply chain participation, and keep reform benchmarks technical rather than political

Align economic and security interests

Maritime security in the Gulf of Guinea directly affects European trade routes. Cooperation with Angola's navy, through the Coordinated Maritime Presences mechanism, could enhance joint surveillance and anti-piracy capacity. Simultaneously, the EU should explore co-financing renewable energy infrastructure that complements the Global Gateway's sustainability goals.

Establish a critical minerals partnership

Angola's mineral wealth means the EU could integrate the country into its Critical Raw Materials Act framework. To do this, the bloc should conclude long-term offtake agreements linked to environmental standards, support local beneficiation and skills transfer and fund geological mapping and environmental governance. Such engagement would diversify Europe's sourcing base while reinforcing Angola's development ambitions.

Promote governance and social inclusion

In its cooperation with Angola, the EU must address Angola's social foundations to strengthen the durability of the relationship. Investing in vocational education, youth entrepreneurship and rural electrification would strengthen public support for reform. The EU should expand existing partnerships beyond central ministries to include provincial governments, universities and civil society organisations.

Angola's precarious power

Angola stands at a juncture between fragility and influence. Domestically, it remains burdened by inequality, weak institutions and an unfinished transition from rentier politics to productive diversification. Internationally, it has achieved what few African states have managed: the transformation of geography and resources into diplomatic capital.

Lourenço's foreign policy has repositioned Angola as an aspiring middle power—not large enough to dictate norms, but agile enough to shape outcomes. Its exit from OPEC, leadership in the AU, mediation in the Great Lakes and orchestration of multifaceted partnership working all attest to a confident, self-aware diplomacy.

Lourenço's pursuit of alliances with Western leaders to strengthen trade, investment and finance will continue during the remainder of his tenure. However, Angola's politicians are also preparing for the election in 2027, and their focus will soon turn towards domestic topics. With it, the space for political pluralism is likely to shrink. Modernisation of the 2010 constitution could improve matters and get buy-in from a fragmented MPLA and the opposition, particularly UNITA. The 2027 election itself is likely to be fiercely contested and ill-tempered; the eruption of widespread violence could disrupt the economy and dent investor confidence. Several of the emerging presidential hopefuls from the MPLA do not share Lourenço's middle power, multipolarity ambition and would prefer to align themselves to a more sharply defined anti-Western, southern alliance.

All this is a reminder of the precarity of life as an aspiring middle power. Success depends equally on resources and credibility—the perception that Angola can deliver stability at home and reliability abroad. But if social discontent deepens or reforms stall, the country’s newfound autonomy could weaken. Conversely, if Angola manages a smooth political succession in 2027, sustains fiscal discipline and harnesses its mineral wealth for inclusive growth, it could emerge as a model of pragmatic African modernisation.

For Europe, Angola’s ascent offers both an opportunity and a warning. It is an opportunity because the country provides a dependable partner in a region vital to Europe’s economic and environmental transition. It is a warning because failure to engage pragmatically risks ceding ground to actors less concerned with transparency or sustainability.

The challenge for Europeans is to make partnership an attractive option for states that have adopted an à la carte approach to foreign policy. For the EU, upgrading the JWF process to a full strategic partnership could enhance mutual alignment with Angola. The Lobito Corridor is a valuable opportunity to demonstrate how to integrate such initiatives into a coherent industrial ecosystem. It also enables European actors to demonstrate they can work with local stakeholders on governance and sustainability standards, turning the Lobito Corridor into a showcase of shared industrialisation rather than yet another extractive route. In a world of fragmented hegemony, Angola has the potential to benefit from the dynamics of the emerging multipolar order—achieving sovereignty through diversification, influence through natural resources and strategic supply chains, and power through regional integration.

About the author

Alex Vines is the director of the Africa programme at the European Council on Foreign Relations, based in the London office. Before joining ECFR, he was part of the executive leadership team at Chatham House as a research director for regions and the founding director of its Africa programme from 2002 to 2025.

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The first paper of the series focused on Brazil, followed by India.

[1] Author interview with an Angolan diplomat, September 2025.

[2] Author interview with Angolan official, October 2025.

[3] Author interview with Angolan official, September 2025.

[4] Author interviews with Angolan and EU officials, October 2025.

[5] Author interviews with diplomats, Paris, November 2025.

[6] Interview with author, 2004.

[7] Author interview with Angolan diplomats, September 2025.

[8] Author interviews with former Angolan government officials, October 2025.

[9] Author's interview with banking official, October 2025.

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