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## Ten Things to Watch in Africa in 2025

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While economic activity in Africa is set to accelerate in 2025, dissatisfaction with governments is likely to persist. Incumbents will feel pressure via the ballot box and youth protests, and conflict risks remain high. The relative decline of EU influence is prone to continue as the EU's Global Gateway Initiative is yet to deliver. We present a selection of "ten things to watch in Africa" in 2025.

- **Politics:** Prospects for democracy remain mixed. The coup wave waned in 2024, and electoral turnover at the ballot box has become more frequent. Formerly popular liberation movements will remain under pressure. However, elections scheduled for 2025 in Cameroon, Côte d'Ivoire, Tanzania, and Gabon are not expected to result in democratic change even though the use of digital technologies promises to reduce the possibility of fraud.
- **Peace and security:** Dissatisfaction with civilian governments can fuel conflict. Jihadism in the wider Sahel, Horn of Africa, and beyond is likely to further intensify and spread. Secessionist conflicts pose latent and manifest risks in Cameroon, Ethiopia, Nigeria, Mali, and elsewhere. Youth protests are expected to continue across the region.
- **International arena:** Regional integration in West Africa has suffered a severe setback. At the same time, an isolationist and transactional US Africa policy under Trump could further reduce "Western" influence. Germany and the EU seek to make "better offers" than contenders such as China and Russia, as security and migration remain important issues for their Africa policies.

### Policy Implications

*African actors must address key governance and security challenges. Despite their waning influence, Germany and the EU can support positive trends in relation to electoral turnover, peaceful youth protest, and enhanced economic activity. To remain important players, they will also need to gauge competing influences from countries such as China and promote models that respect African agency.*

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### Election Watch: Limited Prospects for Democratic Transition and Consolidation

Several high-stakes elections are slated for 2025 (see Figure 1). Prospects for democratic transitions appear limited in several autocracies. In Cameroon, where the world's oldest president, Paul Biya, seeks re-election for his eighth term, the



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likelihood of regime change is rather limited, as the opposition's history of disunity continues. In Togo, the president will be indirectly elected by members of the National Assembly dominated by the ruling party due to a controversial constitutional reform passed in 2024. This poll is expected to extend the tenure of Faure Gnassingbé's nearly 20-year rule.

Several (post-)conflict countries also face challenging elections: Tensions are high in Côte d'Ivoire, where former president Laurent Gbagbo, recently acquitted of war crimes by the ICC, is set to run. In the Central African Republic, the December 2025 elections will take place in a fragile environment following years of civil war. With the recent extension of the transitional military government, another postponement of elections seems likely in Mali, where polls have already been delayed several times.

Legislative elections scheduled for 2025 will also take place amidst significant tension. In the Comoros, parliamentary elections on 12 January followed the contentious re-election of President Azali Assoumani in 2024. Some opposition parties, including the Juwa Party of former President Ahmed Abdallah Sambi boycotted the polls, with results expected in a few days. In Chad, the first parliamentary election in over a decade on 20 December 2024, largely boycotted by the opposition amidst concerns over the election's fairness and credibility, led to further consolidation of the ruling party's power. Legislative elections set for June in Burundi, expected to be closely watched after years of political unrest in the country, will most likely cement the ruling party's domination.

Yet, there are also rays of hope. In Gabon, the general elections could mark a transition away from the current military regime that toppled the 56-year-long Bongo dynasty. Moreover, the recent trend of ruling parties facing significant electoral defeats in reasonably democratic African countries is expected to continue. In 2024 ruling parties in Botswana, Senegal, Mauritius, and Ghana experienced substantial losses, leading to power transfers. There is a chance of further opposition victories in 2025, most notably in Malawi, where the presidential race is anticipated to be a close contest: widespread dissatisfaction with high inflation, the rising cost of living, and a perceived lack of accountability poses a challenge for the ruling president Lazarus Chakwera's bid for a second term. Open competition is also likely in the Seychelles.

In Tanzania, President Samia Hassan, who assumed office following the death of President John Magufuli, has confirmed her candidacy for the 2025 elections. A victory would make her the country's first elected female president. Yet, she faces significant opposition from within the ruling party.

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**Figure 1. Elections in Sub-Saharan Africa in 2025**



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among older voters, urban and younger constituents are increasingly demanding change.

In Botswana, South Africa, and Namibia, these shifts reflect political normalisation. However, in Mozambique and Zimbabwe, respective ruling parties FRELIMO and the Zimbabwe African National Union – Patriotic Front (ZANU-PF) appear committed to retaining power through force. Despite this, further challenges to liberation movement dominance seem inevitable in 2025. In Namibia, the courts may order a re-run of the contested November elections.

## Challenges Mount as Push for Digitalisation Continues

The trend of leveraging biometric technology to enhance electoral processes is set to continue in the 2025 elections (see Figure 1 above). In Cameroon, biometric registration using newly procured biometric registration kits has been completed. Similarly, Tanzania has recently updated its biometric voter registration databases and issued new voter cards. In Malawi, the newly acquired hand-held Electoral Management Devices (EMDs), which replaced the biometric voter registration kits used in the 2019 and 2020 elections, have undergone extensive piloting and testing. Aside from voter registration, these technologies are expected to be used for voter transfer (i.e. the reallocation of voters' registration details from their previous constituency to a new one, typically necessitated by a change in residence) and vote verification as well as results transmission and management. The adoption of such technologies has the potential to significantly improve the accuracy and integrity of countries' electoral processes, reducing fraud and enhancing security. While uncertainties regarding new vulnerabilities and technological failures persist, the symbolic effects of these technologies may nonetheless serve African ruling parties in that they signal commitment to free and fair elections.

Beyond elections, the year 2025 represents a key deadline for the rollout of digital government services in various African countries. Relative success stories, such as Senegal, highlight their government services portal and app, digital ID, e-tax platform, and public procurement website. Similarly, the success of the Digital Ethiopia 2025 strategy will be lauded with its biometric “Fayda” digital ID and “govstack” that includes, for example, a digital payments system and formalisation to enhance tax collection. For Nigerian policymakers, it will be a time of critical reflection, with performance vastly short of its 80 per cent government digitalisation goal. The Democratic Republic of the Congo (DRC) is also heading back to the drawing board after its local company AfriTech failed in its Digital Congo 2025 ID project, leading to a new contract with Singapore-based company Trident. After the recent incumbent election loss, Ghanaian politicians may reflect on whether the cutting-edge digitalisation push enjoys popular support. In general, we expect fresh five-year to ten-year plans for African nations on how to leverage artificial intelligence (AI) to benefit African government efficiency and tax collection. These benefits must be weighed against privacy, human rights, and digital-divide concerns, along with the use of “AI-washing” as a tactic to distract from the inherent dysfunctionality of the existing physical systems, something to be alert to in 2025.

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## Dissatisfaction with Governments Set to Fuel Conflict

Throughout the previous year, violent conflicts in Africa remained geographically concentrated in a belt ranging from the Western Sahel through large parts of Central Africa to the Horn of Africa (ACLED 2024). While structural challenges may lead to escalation in many countries and places, three main phenomena require special attention in 2025.

First, jihadism will continue to plague many countries in the wider Sahel, the Lake Chad Basin, and the Horn of Africa. Other pockets of jihadi activity persist in the eastern DRC and Mozambique. The western coast of Africa remains at particular risk of contagion. Causes of jihadism are country-specific but often connected to grievances of ethno-regional groups, a lack of economic opportunities, general dissatisfaction with governments, and the presence of weak states that lack territorial control. Jihadist insurgencies are generally difficult to resolve once the genie is out of the bottle. Second, secessionist conflicts, which sometimes overlap with jihadism in cases such as Mali, continue to pose a risk. At the time of writing, Cameroon and Mali are witnessing manifest secessionist uprisings, while Ethiopia has managed to find a rather uneasy peace with Tigray. Largely ignored in the German and European public, Nigeria faces tensions with the Igbo region in the southeast. Third, anti-government protests have emerged as a notable challenge. While the wave of coups (Acheampong, Basedau, and Grauvogel 2024) has ebbed, the rise of anti-government protests, often led by youth and at times turning violent – such as recently observed in Kenya and Mozambique – warrants closer inspection.

As dissatisfaction with civilian governments connects the three challenges, it remains imperative to address underlying structural conditions. This will mainly require African efforts. Western governments should refrain from paternalism and be aware of the risks of foreign intervention. Their influence will continue to decrease, notably in terms of military presence. After Western troops, among others, were ordered to leave Mali, Burkina Faso, and Niger – apparently partly replaced by the ex-Wagner “mercenaries” – Chad announced it would sever ties with the former colonial power France. French troops are also set to leave Senegal and have recently been ordered to leave Côte d’Ivoire, marking a historical decline of French military presence on the continent. The shifting geopolitics might present an opportunity, as long as the EU, among other actors, commits to rethinking its efforts to promote stability in 2025. While military assistance should not be ruled out, any improvement in living conditions and general government policies will likely have a more pacifying impact in the long run.

## The Growing Force of Youth Protests

New momentum for youth-led protest movements on the African continent – often related to electoral outcomes in 2024 – is set to further accelerate in 2025. Except for Senegal, which elected Africa’s youngest president, the outcomes of the elections underlined again the significant age gap between the electorate and political representatives. Youth (aged 15 to 35) form the largest voting cohort in most African countries, yet the political elite of each country averages at least 50 years old. While the narrative of disinterest and apathy among youth persists,

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closer examination reveals a more accurate and nuanced picture: Mozambique's general election results last October had young people turning to the streets in large numbers after evidence emerged of electoral fraud. Youth protests in Senegal started towards the end of 2023 after the imprisonment of opposition figures; opposition candidate Bassirou Dismay Faye eventually won the presidency with huge support from the youth electorate.

In June 2024 Kenya's Generation Z revolted against a new finance bill that would have entailed higher taxes for a generation facing high unemployment. After a rigorous protest campaign, in which protests were organised via social media and all generations were united across party and ethnic lines, President Ruto threw out the bill. Kenya's protests inspired demonstrations in Nigeria and Uganda, where young people also called for better economic politics and decried bad governance.

Youth protests in 2025 can draw on successful past examples: Forming over a decade ago, the grassroots youth movement "Le Balai Citoyen" led the protests that eventually ended Blaise Compaoré's almost 30-year grip on power in Burkina Faso. In Nigeria, more young people are now represented in public office following the 2018 Not Too Young To Run Act, which resulted in a reduction of the minimum qualifying age for all public offices. The "End SARS" protests in 2020 against police brutality were also a catalyst for increased political activism among youth in Nigeria. Yet, to sustain momentum into 2025, youth-led protests must face not only police violence but also the challenge of mobilisation. While grassroots mobilisation has many advantages in terms of protest turnout and as a shield against repression, the prospects of toppling long-standing leaders remain uncertain. In 2025 parliamentary and presidential elections are scheduled in Cameroon, whose incumbent president is 92 years old and whose senate's average age of 65 is among the oldest of sub-Saharan Africa's executive chambers. Youth support for opposition party candidates and their participation in anti-government protests over key issues such as unemployment, affordable education, and the environment will also be a continuing and possibly outcome-shaping trend in countries facing elections in 2025, such as Tanzania.

## **ECOWAS at 50: An Uncertain Future for Regional Integration**

In 2025 the Economic Community of West African States (ECOWAS) turns 50. Nobody at ECOWAS, however, is in the mood for celebrations, as Africa's stand-out regional economic community faces its greatest challenge to date. What started out as a united force fighting spreading military coups in the Sahel has quickly turned into a battle over the organisation's very soul and relevance. In the wake of the 2023 coup in Niger, ECOWAS took an unusually strong stance and imposed not only far-reaching sanctions but threatened military intervention. The Nigerien junta banded together with two other Sahelian member states – Mali and Burkina Faso, whose regimes likewise came into power in military coups – to not only reject this approach in the strongest terms but also fundamentally challenge ECOWAS's legitimacy. They formally announced their decision to leave the organisation in January 2024 and are set to officially exit ECOWAS in January 2025 in accordance with the organisation's rules.

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This unprecedented threat of disintegration has left ECOWAS stuck between a rock and a hard place. Either it could continue in strong opposition to the military regimes, thereby jeopardising regional integration efforts and, by imposing sanctions, adding to the civilian suffering, or it could conduct a policy of appeasement and thereby not only abandon the core organisational norm of unequivocally rejecting unconstitutional changes of government but also invite further democratic backsliding. ECOWAS has opted for the appeasement option. Its concerted efforts to prevent the three member states from exiting has, however, failed thus far. At the end of 2024, the organisation intensified its persuasion efforts, with ECOWAS's highest decision-making body declaring a six-month transition period for the three states, during which they may choose to remain members. Whatever the outcome, the organisation and by extension West Africa will not remain the same. The decisions taken in 2025 by those involved will have lasting impacts on the regional outlook and the ECOWAS vision of promoting economic integration, democratic governance, and regional stability as mutually dependent goals.

## **Pressure to Strike Further Deals to Contain People on the Move Increases**

When the European Union adopted its controversial Asylum and Migration Pact in 2024, it once again demonstrated that limiting so-called “irregular migration” and asylum-seeking remains one of the top issues for European policymakers, and that African countries are expected to play a central role in achieving this goal. By means of so-called partnerships, the EU seeks support and cooperation around issues such as preventing departures and loss of life, fighting migrant smuggling, and ensuring effective return and readmission procedures. Quid pro quo deals are already in place with several African countries. While much of the focus has been on the key transit countries in Northern Africa, developments such as the Western African route experiencing record-high crossings in 2024 have European policymakers eyeing further expansion of partnership agreements. While political pressure to strike effective deals is increasing on the European side, incentives for African countries to play along may be decreasing.

The development of restrictive migration policies in Europe and its implications for Africa is something to closely observe in 2025. With the most right-wing European Parliament in history following the 2024 elections and the prospect of conservative leadership in Germany from early 2025, stances towards migration and asylum are expected to further harden. This adds to the risk of interregional rifts if African countries choose to not stop people on the move at their borders and reject calls for expanded and expedited return and readmission initiatives. Moreover, the already dire humanitarian situation along migration routes towards Europe is at risk of deteriorating further. Authoritarian regimes in North Africa are fully aware of their countries' increasing geostrategic importance and willing to use their leverage. The EU's decreasing leverage and increased vulnerability will render the pursuit of other foreign policy priorities, such as the promotion of democratic norms and human rights, even more difficult. An effective reduction in irregular migration towards Europe goes hand in hand with an increased burden experienced by countries of transit, including those in North Africa and the wider

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Sahel, which threatens to further destabilise an already fragile region in 2025. If African countries decide to follow the EU's lead and adopt similar approaches, opportunities for refugees to seek shelter and safety will further dwindle. As African countries bear the brunt of forced displacement in the region by offering protection and shelter to those in need, there is urgent need to monitor and respond to signs of further erosion of international refugee law in 2025.

## The EU's Global Gateway Initiative Yet to Deliver

The European Union's Global Gateway Initiative (GGI), launched in December 2021, aims to invest EUR 300 billion globally by 2027, with approximately half dedicated to Africa. The initiative focuses on enhancing infrastructure and social services focusing on green energy, digital transformation, health, and education. In December 2024 EU member states endorsed 46 GGI flagship projects for 2025 that are meant to represent prominent examples of deliverables, of which 20 either target or include countries in sub-Saharan Africa. The largest group on this list are projects related to climate and energy, ranging from the large-scale hydrogen project in Namibia to energy connectivity projects in Mauritania, Uganda, and South Sudan and dam rehabilitation efforts in Ghana. Moreover, there are also several transport projects – for example, port development projects in Benin and the Seychelles and railway infrastructure in Gabon. Sustainable cocoa (in Côte d'Ivoire) and coffee production (several countries) projects can also be found on the list, as well as a sustainable urban food investment project in Tanzania. In addition, the announcement of flagship projects includes three digital infrastructure and two health projects. Central and Southern Africa feature less prominently than West and East Africa.

Proponents of the GGI could claim that this list of projects illustrates the breadth of sectors and the scope of the initiative, whereas sceptics may point to the lack of strategy and focus. While the high ambitions of the GGI in Africa are articulated in broad terms, it lacks clear targets, transparency, and mechanisms to monitor achievements. Thus far, there is little tangible evidence of effective implementation, and even less of achievements. Overall, critics correctly highlight the opacity around the GGI (Bohne 2023), which has bred scepticism about the EU's commitment and its ability to both deliver on its promises and provide an alternative to China's Belt and Road Initiative. Time is working against the EU's efforts, and 2025 might be a decisive year for the EU to prove its sceptics wrong by demonstrating real progress on projects that make a difference at scale.

## What Africa Can Expect from Trump 2.0

Donald Trump's second term as US president will start on 20 January 2025. The added fact of Republican control of Congress could present significant challenges for many African states. Trump's isolationist and protectionist policies, combined with traditional US foreign policy apathy towards Africa, raise several concerns.

Broadly speaking, Trump's transactional approach could decrease the amount of foreign aid given by the US (currently about USD 3.7 billion). Cuts would especially affect the fight against HIV/AIDS, reproductive health, and vaccination programmes. Trump's climate change scepticism is set to reduce US contributions



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to climate change emergency funds. This limits relief for climate-related crises across Africa. Moreover, Trump's economic protectionism threatens the planned 2025 renewal of the African Growth Opportunity Act (AGOA), which provides duty-free access to the US for 6,800 sub-Saharan African products.

However, some countries stand to benefit from the incoming US government: States such as the Central African Republic, Gabon, Niger, and Uganda could see their suspensions from AGOA lifted due to Trump's relative indifference to human rights and the rule of law. Countries that have strong security partnerships with the US, such as Kenya and Djibouti, where the US maintains a naval base, will likely maintain these ties with Washington, although current levels of security funding are not guaranteed. In addition, Trump's potentially permissive stance towards Putin suggests that Russia's security presence in countries such as Mali, Niger, and Burkina Faso may be less likely to be challenged.

While African states have experience working with a Trump-led administration, pressure for states to take overt positions on the US's geopolitical priorities is likely to increase and will challenge traditional non-alignment strategies. Divergences regarding the Israel–Palestine conflict could especially cause strain. With South Africa's new ambassador to the US stating he would put away the “megaphone” regarding Gaza ([Fabricius 2024](#)), other countries might adopt a similar public stance. For 2025 we expect African governments to navigate Trump 2.0 by balancing national interests and pragmatic engagement with the US.

## **Global Challenges and Budgetary Pressures Will Shape Germany's Africa Policy**

With German elections scheduled for 23 February 2025, it remains unknown at the time of writing which parties will form the new government and who will head relevant ministries for Germany's Africa policy, including the Federal Foreign Office (FFO) and the Federal Ministry for Economic Cooperation and Development (BMZ). The German Africa Policy Guidelines approved by the current cabinet ([Federal Foreign Office 2025](#)) outline goals that appear both inclusive and realistic, while also acknowledging potential trade-offs.

Global challenges will strongly inform Germany's Africa policy in 2025 and beyond. First, regarding its relevance, the Africa policy is likely to take a back seat to challenges in Europe (with the potential exception of migration containment efforts), as Germany's relationship with Russia, anxiety regarding a potential transatlantic rift with the incoming Trump administration, and economic and political relations with China are likely to receive more attention.

Second, global political shifts will cast their shadow on Africa, with a continuing diversification of “non-Western” external actors and a related decline in European and German influence. This trend will increase African agency and thus promote the often cited “eye-level cooperation” (German: *Partnerschaft auf Augenhöhe*), but it also carries risks. The fact that African partners have more leverage in choosing their partners may incentivise Germany to offer support to governments with less “promising” policies. Moreover, external rivalries may further

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fuel armed conflicts on the continent, such as those currently being waged in Mali and Sudan.

Third, interests such as containing migration (see above), securing the supply of critical raw materials and, to a lesser degree, addressing security concerns in relation to jihadist terrorism will play a key role. More values-based goals, most notably the search for allies to defend a rules-based world order, may not always align with these strategic interests. Yet, “hard” interests and values-based goals may also intersect, especially in the context of global competition – if not rivalry – with authoritarian regimes in Russia and China over the best political and economic system models (German: *Systemkonkurrenz*). Generally, the balance between interests and values, which are neither fully compatible nor completely mutually exclusive, remains an ongoing, sometimes delicate challenge.

In Germany’s development policy towards Africa, major shifts can be expected if the BMZ becomes part of a new “Ministry of International Affairs.” Such plans have frequently been discussed in the run-up to elections; though the BMZ has survived such debates since 1961, a potential renewal of this debate prior to the polls is worth watching in 2025. The development budget has already been under pressure under the outgoing government; this situation is unlikely to change under a new government. Whether development policy priorities in Africa – under even more severe budget constraints – will change much depends on what party eventually sets the course for the BMZ.

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## Imprint



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