The future of African-European relations

Results of a Realtime Delphi survey

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Foreword

On 1 July 2020, Germany took over the presidency of the Council of the European Union. One of the German Government's key priorities is to strengthen the partnership between the EU and Africa, including in the area of development cooperation, making this the perfect time to take an in-depth look at the future relationship between the two continents. With a new EU-Africa strategy in the making, the 6th EU-AU summit due to take place in October 2020 and negotiations around a Post-Cotonou Agreement underway, a dedicated review of EU-Africa relations is timely.

While we cannot predict the future, we can explore its possibilities in order to be better prepared for it. In this regard, strategic foresight is one approach which can help us to systematically deal with possible developments, understand challenges and increase preparedness.

In order to explore different perspectives with regard to possible future developments in relations between Africa and Europe, the BMZ together with the Fraunhofer Institute for Systems and Innovation Research ISI and GIZ conducted a so-called Delphi survey – a method of strategic foresight. The aim of this expert survey is to provide insights from both continents and to draw a picture of possible future relations between the two continents.

In total, 90 experts from Africa and Europe, from the areas of politics, administration, business, academia and civil society, participated in interviews and an online survey. Their valuable insights reveal a diverse spectrum of future paths along which relations between Europe and Africa may unfold. These range from a close partnership mastering the future together to an indifferent cohabitation of neighbors, highlighting the fact that in the views of the experts all futures seem possible at this point in time. However, one imperative becomes clear: if we want strong cooperation to tackle global challenges from climate change to COVID-19, if we want to shape the future as partners, the time to act and define our relationship is now!

I wish you an inspiring read.

Martin Jäger
State Secretary in the Federal Ministry for
Economic Cooperation and Development

Contents

1 Introduction and methodology

Africa and Europe are very close neighbours: the shortest distance between them is just 14 kilometres. Yet it is not just our geographical proximity that binds us but also our shared history, interests and challenges. The need for Africa and Europe to cooperate is evident to tackle climate change, implement the 2030 Agenda, deal with migration and fight pandemics, among many other areas. A famous African proverb says 'If you want to go fast, go alone. If you want to go far, go together.' But who will be our travelling partner? Will the two continents continue to be close partners, or will other players take over Europe's role? And will the two continents be able to take their partnership to the next level?

African-European relations are now at a crossroads. What form will they take in the long term?

2020 is a decisive year for African-European relations, with negotiations around the Post-Cotonou Agreement, the 6th AU-EU summit and a new EU Africa strategy. How can we seize this momentum to foster and deepen cooperation?

Germany has taken over the Presidency of the European Council on 1 July 2020 and will make relations with Africa a major focus. Against this backdrop, the Federal German Ministry for Economic Cooperation and Development (BMZ) has been exploring the future of African-European relations, using strategic foresight – a structured and systematic way to better prepare for possible future(s). A Delphi survey (see Info box below) was conducted by Fraunhofer ISI and GIZ to generate expert knowledge and explore different perspectives from Africa and Europe. The survey was based on the following questions:

→ How can cooperation between Africa and Europe be made fit for the future?

→ How can strategy be designed to promote sustainable cooperation between Africa and Europe?

→ What are the main drivers, opportunities and uncertainties or 'blind spots' that are relevant to the relationship?

The results set out in this report will contribute to the political discourse of Germany's Presidency of the European Council, including in the Africa Forum on 29 September 2020.

The views and opinions expressed in this study are those of the interviewees and do not necessarily reflect the official position of BMZ.

DELPHI SURVEYS

The Delphi survey method is an expert survey in two or more "rounds". It is a **systematic and interactive foresight method** designed to elicit **feedback from a panel of experts** and gives the opportunity to change one's own opinion.

The focus of Delphi surveys is always a topic about which knowledge and judgement processes are uncertain.

Experts are asked to assess or evaluate 'theses' – statements about future issues. This is done by means of open or closed questions, e.g. on the importance or possibility of, or time horizon for realisation. The same questions are asked at least twice.

The Realtime Delphi (RTD) method is a structured (online) survey with immediate feedback that enables participants to revise their own input in response to other participants as often as they wish.

Feedback is given in real time – that is, the aggregated responses are fed back to the experts as soon as they answer for the second time (Gordon and Pease 2006, Aengenheyster et al. 2017).

Delphi surveys are not representative.

DELPHI SURVEY PROCEDURE

STEP 1: IDENTIFICATION OF EXPERTS
38 African and European experts from politics, administration, business, academia and civil society were identified to be personally interviewed (list of experts, see Annex 6.1). The selection of experts was made considering a gender, regional and sectoral balance.

STEP 2: EXPERT INTERVIEWS
Expert interviews were conducted in February and March 2020 in order to identify issues and opportunities of and obstacles to future African-European relations.
(questions for interviews see page 8)

STEP 3: FORMULATION OF THESES
Based on the analysis of the expert interviews, **22 theses on the future of African-European relations** were formulated by Fraunhofer ISI and GIZ. Each thesis stands for itself and may contradict another thesis.
(overview of theses see pages 6–7)

STEP 4: REALTIME DELPHI SURVEY – ASSESSMENT OF THESES
The theses were subsequently assessed in a Realtime Delphi survey online in March and April 2020 involving 90 participants providing anonymous input on their possibility, time horizon, influence and desirability (for demographic data, see Annex 6.2).
(questions of Realtime Delphi Survey see page 8)

STEP 5: ANALYSIS OF REALTIME DELPHI SURVEY
The evaluation of theses, explanations and comments were statistically and qualitatively analysed. In this context, differences in the assessments of different groups (gender, region, sector) were examined when they were statistically significant.

Overview of ▌**22**▶ theses

1 ▶ Preferred cooperation partner

Europe is Africa's preferred cooperation partner as the continent benefits from the EU's experience as social welfare and economic integration model.

2 ▶ Africa, seeing little value in European cooperation

Africa, seeing little value in European cooperation, has teamed up with more like-minded partners to address the continent's most pressing challenges and opportunities (such as urbanization or leapfrogging).

3 ▶ The 'African-European model'

The two continents have reshaped the international order the 'African-European way', strengthening soft power and rules-based multilateralism.

4 ▶ Global trading mechanisms

The EU has leveraged its economic weight in order to re-structure global trading mechanisms and institutions (such as the WTO) in a way that is just and beneficial for both continents.

5 ▶ Common voice

African and European states have managed to find a common voice vis-à-vis their partner continent. They now implement comprehensive strategies jointly, and have overcome fragmented policy choices.

6 ▶ Development aid approach

The EU has given up its established development aid approach based on conditionalities and responded to African demands for more direct investment, trade and joint projects.

7 ▶ Young Africans

Young Africans no longer connect to the cultural and geographic proximity between the two continents, and rather regard themselves as 'global citizens'.

8 ▶ Colonial past of Europe in Africa

The colonial past of Europe in Africa has not been processed. This seriously deteriorated the relations between the two continents.

9 ▶ African Agency

'African Agency' – the continent's capacity to act – is unquestioned. Based on the principle of 'African solutions to African problems', the continent is setting its own priorities and implements its strategies without external interference.

10 ▶ African way of life

The African continent exports its pop culture and 'its *African way of life*' to Europe and the world, and a young and confident middle class sets the tone for global trends and lifestyle.

11 ▶ Societal and cultural exchange

Intense societal and cultural exchange between Africa and Europe has become a game-changer. By building trust and altering perceptions, it has fundamentally re-balanced the power relationship between the two continents.

12 ▶ **Legal and unrestricted mobility**

Legal and unrestricted mobility both within and between the two continents is driving economic prosperity and cultural exchange.

13 ▶ **(Digital) Platforms for exchange**

In order to exploit the potential of divergent demographic developments in Africa and Europe, platforms – for example for job searches and academic exchange – are used widely.

14 ▶ **Non-state actors**

African-European relations are shaped by a plethora of non-state actors (such as philanthropy, religious leaders, NGOs, social movements, individuals). This has fundamentally changed traditional state-to-state relations.

15 ▶ **African Security Architecture**

A new African Security Architecture is in place. It is the result of close African-European cooperation and is characterised by a shared understanding of human security, an EU-inspired mix of hard and soft power instruments and a focus on conflict prevention.

16 ▶ **Security collapse**

Divergent assumptions between Europe and Africa about security challenges have led to the collapse of the security situation in key conflict settings such as the Sahel and the Horn of Africa.

17 ▶ **Authoritarian alliances**

Authoritarian regimes in Europe and totalitarian leaders in Africa have exploited the weakness of democracy and joined forces to champion their political agendas.

18 ▶ **Populism, xenophobia and nationalism**

Populism, xenophobia and nationalism have led to a dramatic deterioration in African-European relations.

19 ▶ **African innovation potential**

Africa has successfully used its technological and digital potential to develop solutions for pressing global challenges (e.g. smart cities, urban agriculture, pandemic response, e-health). The continent exports its innovations to Europe and the world.

20 ▶ **Cooperation on climate change**

Climate change created momentum for cooperation. Africa and Europe were able to align their policy response in the face of a common challenge.

21 ▶ **A radical green transition**

The external dimension of Europe's Green Deal has provided strong impetus for a radical green transition and energy access for all in Africa.

22 ▶ **Pandemic preparedness**

As an issue of cross-cutting importance for both continents, joint African-European pandemic forecasting and response strategies are in place.

KEY QUESTIONS FOR THE INTERVIEWS WERE:

1. What are the **most relevant future topics** in African-European relations that you expect until 2045?

2. What are the **most relevant future opportunities** in African-European relations you see until 2045?

3. What **risks or challenges** in African-European relations do you see until 2045?

4. Is there a topic that you regard as **underestimated in African-European relations**?

5. Do you have a **vision** of future African-European relations? (If not an entire vision, can you think of **central elements** a vision would have to tackle?)

6. Who would be the **key actors** to realize or contribute to this vision?

FOR EACH THESIS, PARTICIPANTS WERE ASKED THE FOLLOWING QUESTIONS:

1. Do you think this is possible?
   a. Why do you think this is possible/not possible?

2. If you consider it possible, until when?

3. If this development happens, how influential will it be on the African-European relationship?
   a. Please give reasons for your rating.

4. Is this development desirable from your personal perspective?

Needless to say, Covid-19 has left its mark on this survey. The pandemic has affected all political, economic and societal spheres in Africa and Europe, so it could also fundamentally impact future cooperation, among other areas in terms of doing business, fighting hunger, ensuring joint pandemic preparedness, managing conflict and adapting social security systems. A sup-plementary question was therefore added during the course of the survey: 'What could be the short-term impacts of the Covid-19 crisis on African-European relations?' Participants' responses were incorporated into Chapter 4.6 of the report.

2 Key findings

With a collapse in security, pandemics, populism, economic crisis and climate change, the future of Africa and Europe can, at times, look bleak and characterised by challenges that are as diverse as they are impactful.

However, the opportunities, too, are diverse. With political will, credible leadership and tangible efforts towards implementation, Africa and Europe could not only make a virtue of necessity by joining forces to address common threats but also engage in shaping future cooperation on key global issues and set out a path towards a more peaceful, sustainable and just future.

This was the central narrative around which the interviews and Delphi theses on future African-European relations took place.

However, during the course of the survey, it became apparent that opinions and assessments of possibility, influence and time horizon diverge and that setting priorities involves as many options as there are fields of expertise. Nevertheless, some issues turned out to be particularly important in the view of the experts. Based on the analysis of the expert interviews and the Realtime Delphi survey, the following key results have therefore been identified:

→ **Everything is on the table:** There is considerable uncertainty around the immediate future of African-European relations. Will there be approximation or alienation? Experts consider both options possible. Now is the time to kick-start a new era of cooperation.

→ Africa and Europe together account for about half the world's countries. If the two continents manage to join forces, they could make safe-

guarding multilateralism a common future endeavour through an **African-European path to international cooperation.**

→ The external challenge needs to be tackled from within: will Africa and Europe be able to reach a coherent position vis-à-vis each other? The most controversial thesis in this study is whether each continent manages to find a **common voice.**

→ Europe is not the only partner Africa may have in future. With **changing global interests and alliances**, Africa is increasingly in a position to pick and choose. It will become ever more important to identify and shape the 'unique selling point' that distinguishes cooperation between the two continents.

→ **'African Agency'** – the African continent's capacity to act – is key. Europe needs to acknowledge that Africa has African solutions to African and global challenges and that they form part and parcel of the continent's self-confidence.

→ The **colonial heritage** of Europe in Africa still overshadows relations between the two continents. Coming to terms with the wounds of the past is indispensable if future African-European cooperation is to be placed on a solid footing.

→ **Africa's young people** represent more than a 'demographic dividend'. A generation of young, self-confident and innovative future leaders is increasingly asserting its place in society and demanding a say in politics. Their vision for the continent's future will profoundly influence the shape of African-European relations.

→ African-European relations are not just about politics and economics. Greater attention should be paid to **societal and cultural exchange** and fostering personal contacts to tackle stereotypes, build trust and alter perceptions.

→ From civil society and philanthropists to businesses, religious leaders and individual change agents, **non-state actors** are increasingly influencing African-European relations. In order to successfully enhance cooperation, institutionalised and other channels of involvement for non-state actors need to be put in place.

→ The **security cooperation** between Africa and Europe involves a number of dimensions. Institutionally, Africa could benefit from European approaches and instruments (e.g. its mix of hard and soft power). However, even greater effort needs to be invested in aligning divergent concepts. A shared understanding of 'human security' (encompassing issues such as cross-border trade, environment and health) could take centre stage in this debate.

→ **Migration** is likely to remain a politically sensitive topic in the years to come, framed either as 'the burden of migration' or as 'beneficial mobility'. Though the narratives are different, the questions to be answered remain the same. Providing platforms for professional and academic exchange, both for Africans in Europe and for Europeans in Africa, could be a practical way of harnessing the benefits of mobility in the short term.

→ **Shared challenges** such as climate change, energy supply and pandemics may be opportunities for cooperation. Joining forces on concrete problem-solving might not only become a litmus test for the quality of African-European relations but might also have spill-over effects for cooperation in other policy areas.

→ The **Covid-19 pandemic** could create momentum for cooperation. As a global threat that touches on every dimension of our social, political and economic reality, a joint African-European response could have an impact way beyond the narrower confines of global health.

3 Overall assessment and interconnections

The following section gives an overview of the assessments of influence, possibility and time horizon generated by the online survey and shows how they interconnect.

For each thesis, Figure 1 illustrates the aggregated responses to the question 'If this development happens, how influential will it be for African-European rela-

tions?' The results suggest that the topics covered by the survey are very important to the future African-European relations: all 22 theses were rated as influential by the vast majority of the participants.

Among these, shaping the international order 'the African-European way' by strengthening soft
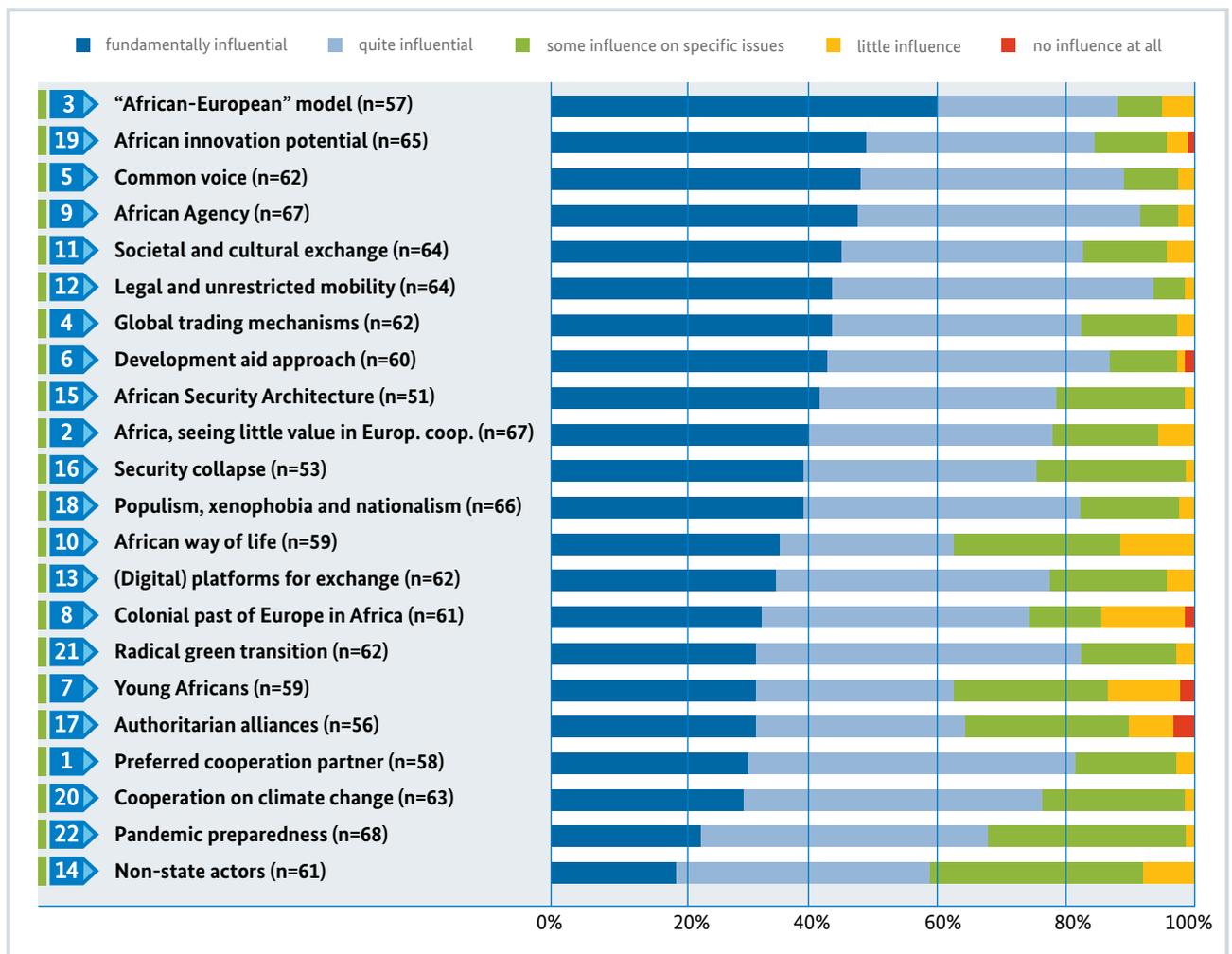
Figure 1: Influence – all 22 theses (sorted according to 'fundamentally influential')

power and rules-based multilateralism is seen to have a particularly large influence. Moreover, a group of nine theses is seen as 'fundamentally influential' by more than 40 % of respondents. Interestingly, all of them indicate rather positive 'visions' of the two continents' future relations, e.g. Africa and Europe speaking with a common voice, having intense cultural and societal exchange and enjoying legal and unrestricted mobility both within and between the two continents.

The survey also asked 'Do you think this (thesis) is possible?' Most of the theses are rated as 'definitely possible' or 'rather possible' (Figure 2). For six theses, respondents

rate possibility above 80 %. The two theses with the highest possibility rating within this group were very different, however.

First, and very encouragingly, the thesis on cooperation on climate change receives the highest possibility ratings of all theses. Tackling climate change jointly via an African-European response is perceived as representing real momentum for enhanced cooperation between the two continents.

However, the future does not look as promising in relation to the thesis on populism, xenophobia and nationalism, which respondents – with almost equal
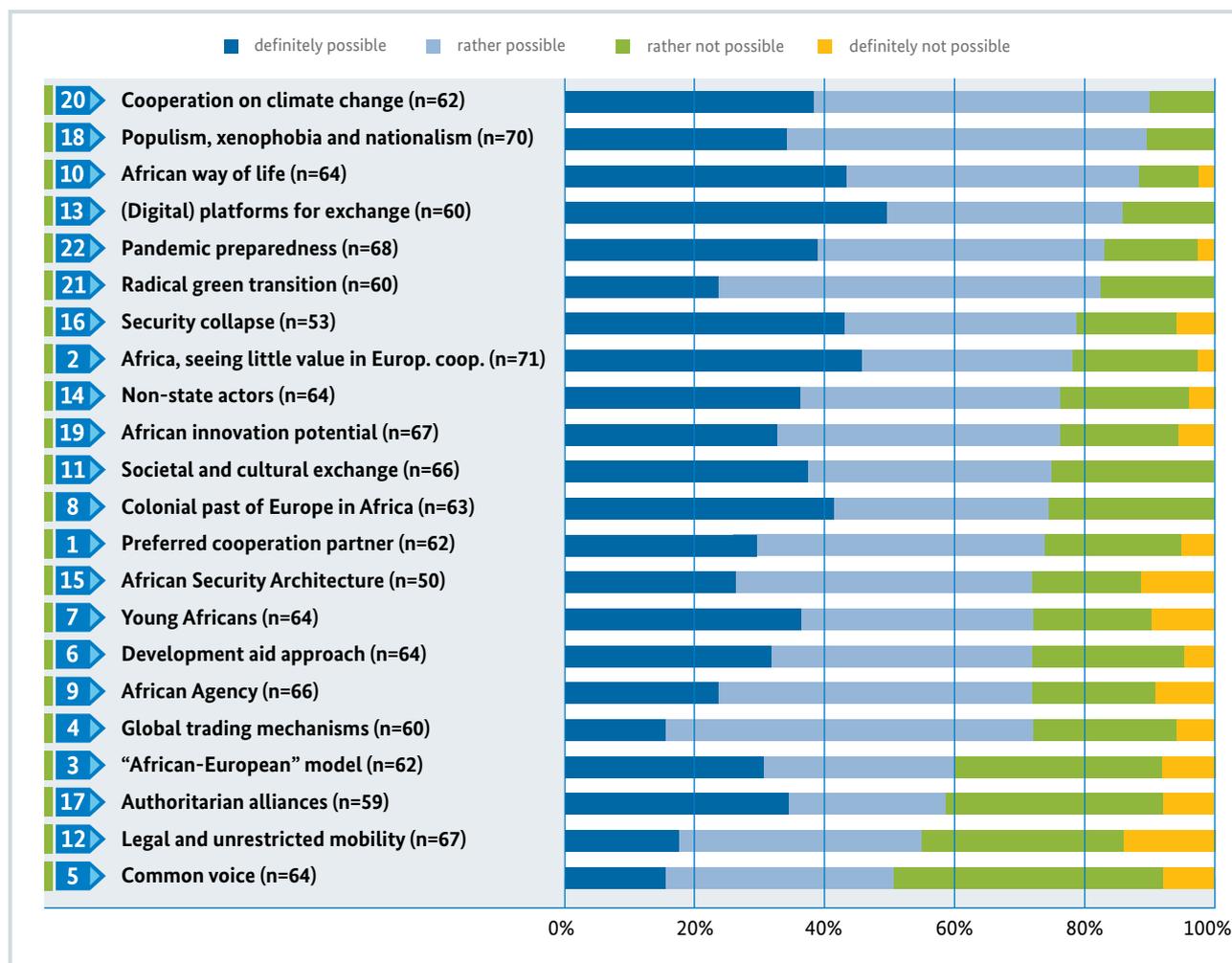
Figure 2: Possibility – all 22 theses (sorted according to 'definitely possible' and 'rather possible')

ratings than those on cooperation on clime change – perceive as 'definitely possible' or 'rather possible' in terms of seriously undermining the relations between the two continents.

On the other hand, some of the theses are regarded as less likely or more uncertain. Legal and unrestricted mobility within and between the two continents is rated as 'rather not' or 'definitely not' possible by almost half of the respondents. A paradigm shift in the two continents' migration policy thus appears to be one of the least imaginable scenarios. The same applies to Africa and Europe speaking with a common voice and implementing joint strategies,

which also rates relatively low on possibility compared with the other theses.

Participants were also asked to assess the time horizon for realisation of the theses in response to the question 'If you think (the thesis) is possible, until when?'

Here, there were three different groups of responses (Figure 3).

→ A majority consider the time horizon for the first seven theses to be short-term (realisation by 2025). These theses are led by threats like populism, xenophobia, nationalism, security collapse and
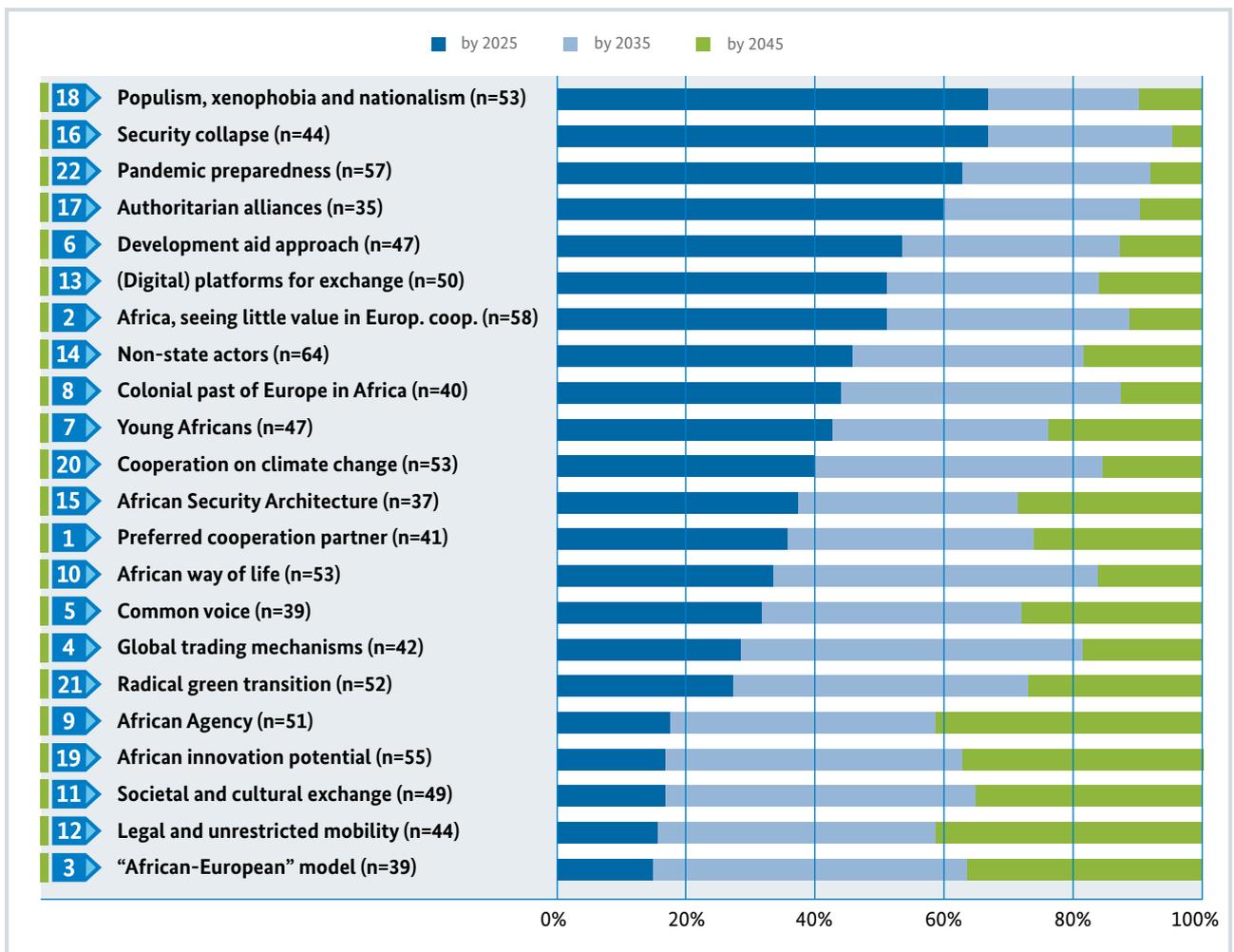
Figure 3: Time horizon (sorted according to the earliest time horizon, by 2025)

authoritarian alliances but also by the scope for Africa and Europe to join forces to forecast pandemics.

→ More than 80 % consider the last five theses to be medium- to long-term developments (realisation by 2035 to 2045). They include 'big' topics like an 'African-European model' for re-shaping the international order or legal and unrestricted mobility.

→ Assessments regarding the time horizon for the ten remaining theses vary. Some respondents regard them as short-term, others as medium- or even long-term.

None of the theses attracts complete consensus on the time horizon, but the thesis on a new African Security Architecture is the subject of particular disagreement over its time horizon, with an almost equal distribution of all possible responses.

Most of the theses in the last question in the Delphi survey about **desirability** ('Is this development desirable from your personal perspective?') are rated quite straightforwardly, with those theses with positive connotations mostly assessed as desirable and those with a gloomier outlook mostly assessed as undesirable. This study will, therefore, consider desirability only in those cases where it was discussed controversially, where the findings were striking, or where significant differences were found between the ratings of different participant groups.
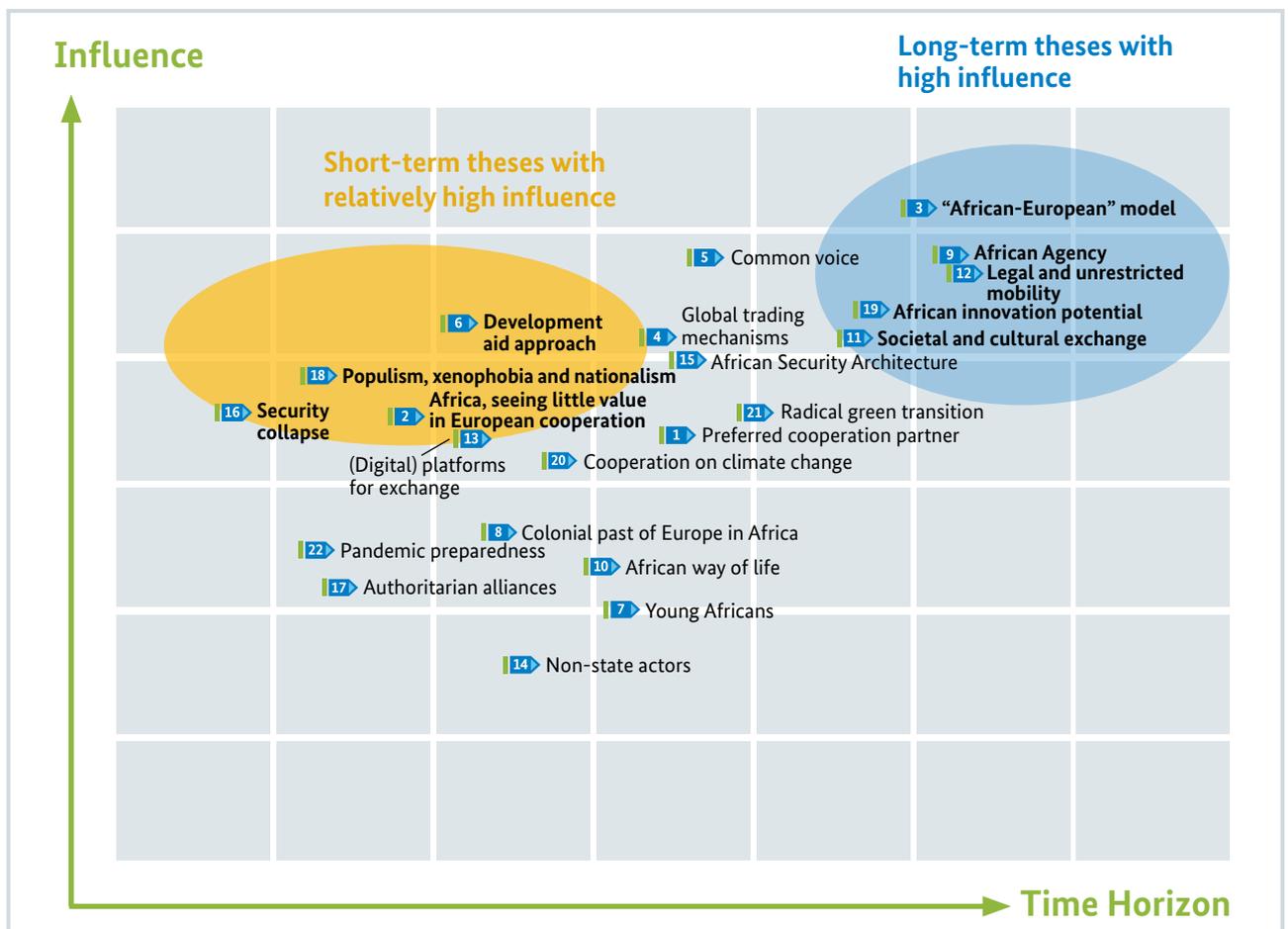
Figure 4: Influence and time horizon

The study will also highlight differences between participant groups in their ratings of possibility, time horizon and influence where these differences are significant.

Figures 4, 5 and 6 show how the answers on possibility, time horizon and influence interrelate.

Figure 4 shows the correlation between ratings of the time horizon and of the influence of individual theses. A number of highly influential theses are rated as having a long-time horizon. This is unusual for Delphi surveys, where high influence is often associated with issues with a short time horizon. In this case, we find high influence being attached to theses with both short and long-time horizons. However, the long-term theses are rated more highly in terms of influence

than the short-term ones. This gives rise to two groups of theses.

Those with a long time horizon include some 'big' topics, such as an African-European model for reshaping the international order, intense societal and cultural exchange between the two continents, legal and unrestricted mobility, African solutions, and unquestioned 'African Agency'. Those issues will require long-term structural transformation, for which the foundations need to be laid today but whose implementation will take time.

The theses with a short time horizon that are rated highest on influence include populism, xenophobia and nationalism, security collapse, and an Africa that
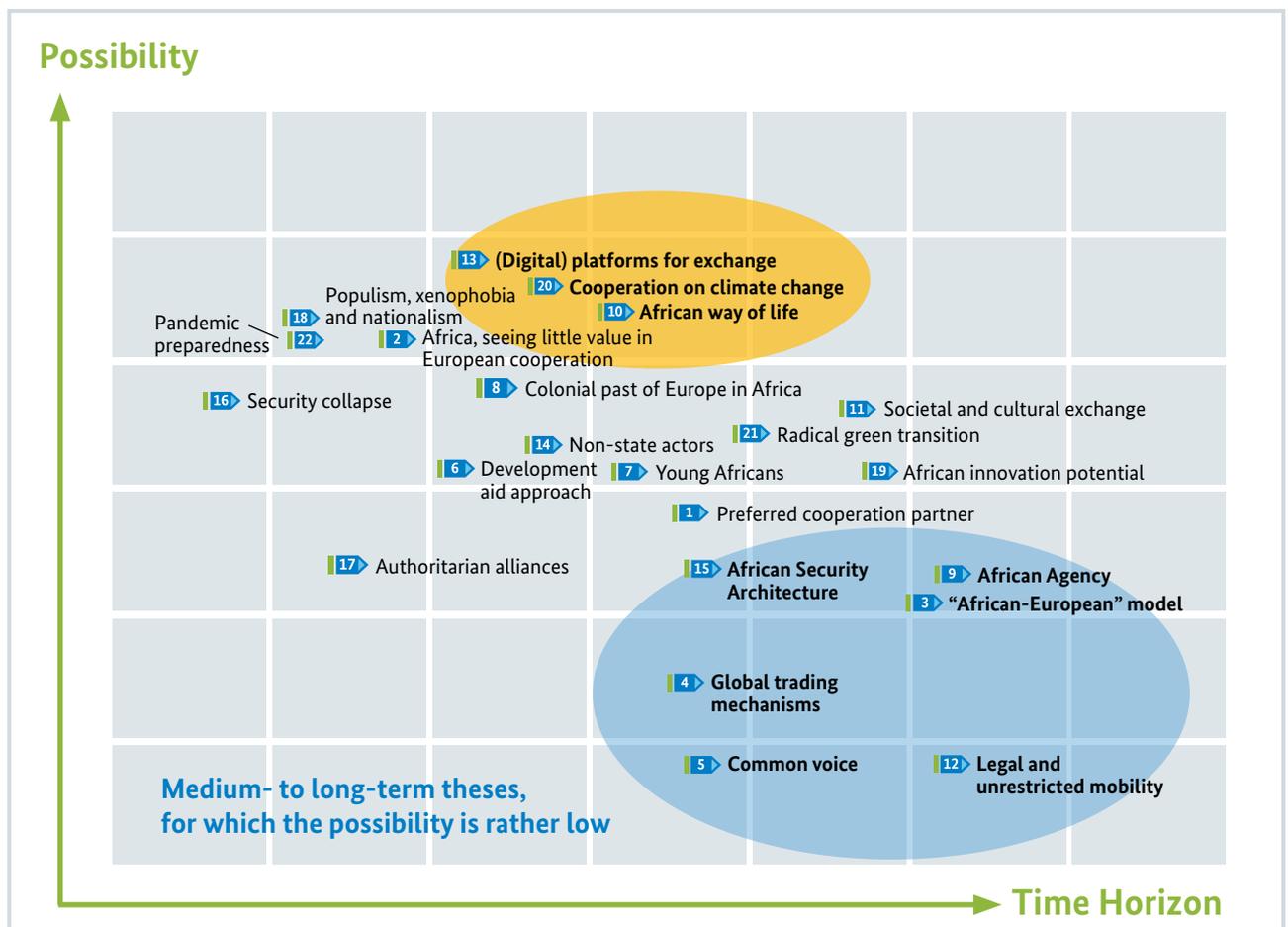
Figure 5: Possibility and time horizon

sees little value in deepening relations with Europe. These trends have serious potential for a deterioration in African-European relations. At the same time, the issue of the EU recalibrating its development aid approach is also considered as being highly influential and achievable within a short time horizon.

The relationship between time horizon and possibility (Figure 5) shows that the theses rated as long-term projects are also rated as less possible than others, for example structural challenges such as reforming global trading mechanisms and institutions.

The highest possibility ratings are attributed to three medium-term theses with positive connotations: respondents see a very high possibility that platforms for

exchange will make use of the potential of divergent demographic developments in the two continents by 2035. The same applies to African-European cooperation to combat climate change and to the export of the 'African way of life' to Europe and the wider world.

It is striking that the lowest ratings for possibility are attributed to high-influence theses (Figure 6). It goes without saying that issues such as 'African Agency', establishing a new African Security Architecture, reform of global trading mechanisms, legal and unrestricted mobility and speaking with a single common voice in Europe and Africa are difficult to achieve. Despite having a vision of the way forward, most experts seem to be more sceptical when it comes to the possibility of actually achieving it.
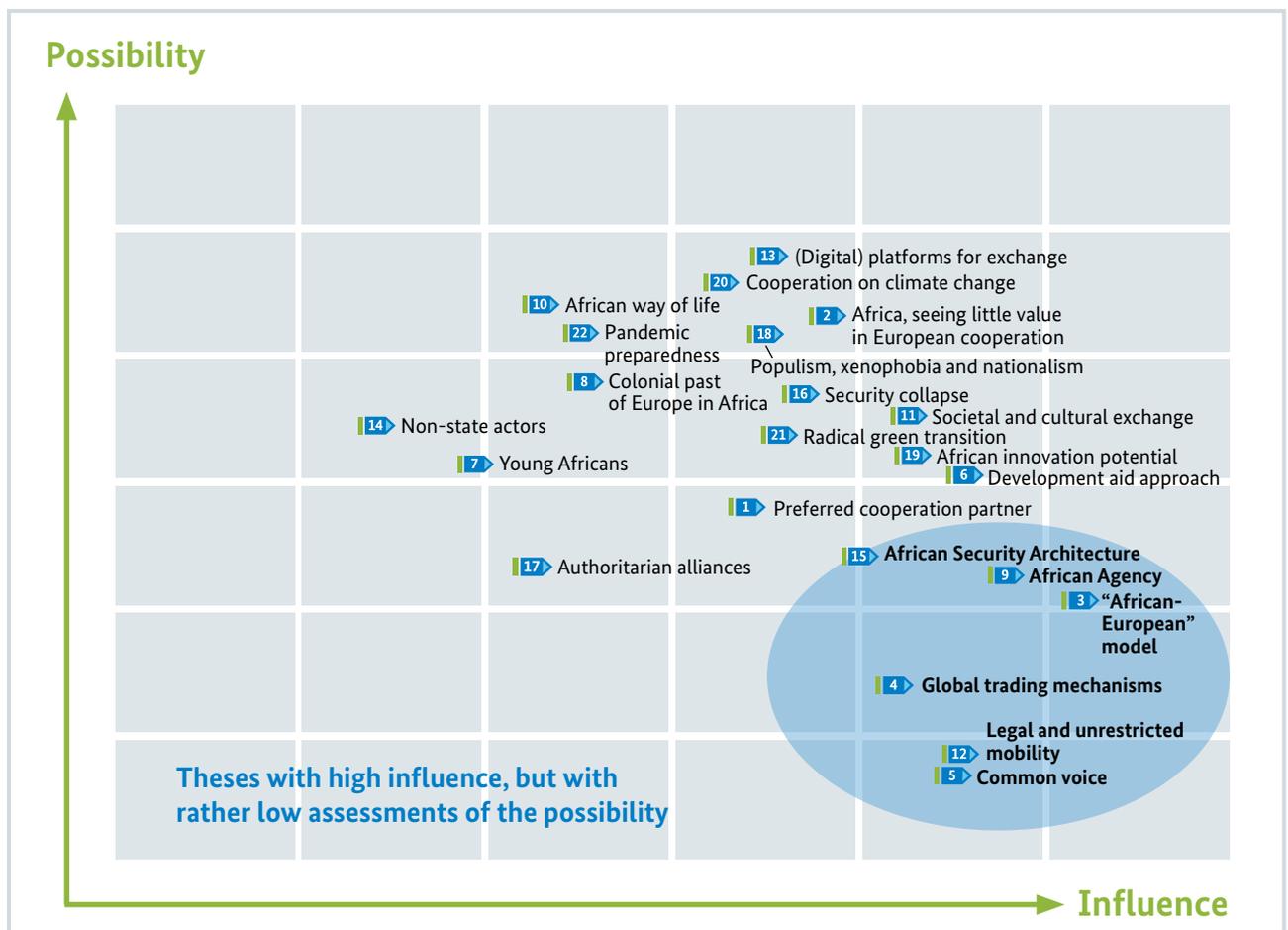
Figure 6: Possibility and influence

4 Analysis

For the analysis, **the 22 theses** on the future of African-European relations have been assigned to **five thematic clusters** after the Realtime Online Survey.

Cluster 1:

Cooperation in a new global order: how can we transform multilateralism?

1 ▷ Preferred cooperation partner

Europe is Africa's preferred cooperation partner as the continent benefits from the EU's experience as social welfare and economic integration model.

2 ▷ Africa, seeing little value in European cooperation

Africa, seeing little value in European cooperation, has teamed up with more like-minded partners to address the continent's most pressing challenges and opportunities (such as urbanization or leapfrogging).

3 ▷ The 'African-European model'

The two continents have reshaped the international order the 'African-European way', strengthening soft power and rules-based multilateralism.

4 ▷ Global trading mechanisms

The EU has leveraged its economic weight in order to restructure global trading mechanisms and institutions (such as the WTO) in a way that is just and beneficial for both continents.

5 ▷ Common voice

African and European states have managed to find a common voice vis-à-vis their partner continent. They now implement comprehensive strategies jointly, and have overcome fragmented policy choices.

6 ▷ Development aid approach

The EU has given up its established development aid approach based on conditionalities and responded to African demands for more direct investment, trade and joint projects.

Cluster 2:

Shared history, common future? – What it takes to start over

7 ▶ Young Africans

Young Africans no longer connect to the cultural and geographic proximity between the two continents, and rather regard themselves as 'global citizens'.

8 ▶ Colonial past of Europe in Africa

The colonial past of Europe in Africa has not been processed. This seriously deteriorated the relations between the two continents.

9 ▶ African Agency

'African Agency'– the continent's capacity to act – is unquestioned. Based on the principle of 'African solutions to African problems', the continent is setting its own priorities and implements its strategies without external interference.

10 ▶ African way of life

The African continent exports its pop culture and 'its African way of life' to Europe and the world, and a young and confident middle class sets the tone for global trends and lifestyle.

Cluster 3:

Changing perspective: a bottom-up approach to African-European relations

11 ▶ Societal and cultural exchange

Intense societal and cultural exchange between Africa and Europe has become a game-changer. By building trust and altering perceptions, it has fundamentally re-balanced the power relationship between the two continents.

12 ▶ Legal and unrestricted mobility

Legal and unrestricted mobility both within and between the two continents is driving economic prosperity and cultural exchange.

13 ▶ (Digital) Platforms for exchange

In order to exploit the potential of divergent demographic developments in Africa and Europe, platforms – for example for job searches and academic exchange – are used widely.

14 ▶ Non-state actors

African-European relations are shaped by a plethora of non-state actors (such as philan-thropy, religious leaders, NGOs, social move-ments, individuals). This has fundamentally changed traditional state-to-state relations.

Cluster 4:

Peace, security and democracy: adjusting concepts, strategies and institutions

15 ▷ African Security Architecture

A new African Security Architecture is in place. It is the result of close African-European cooperation and is characterised by a shared understanding of human security, an EU-inspired mix of hard and soft power instruments and a focus on conflict prevention.

16 ▷ Security collapse

Divergent assumptions between Europe and Africa about security challenges have led to the collapse of the security situation in key conflict settings such as the Sahel and the Horn of Africa.

17 ▷ Authoritarian alliances

Authoritarian regimes in Europe and totalitarian leaders in Africa have exploited the weakness of democracy and joined forces to champion their political agendas.

18 ▷ Populism, xenophobia and nationalism

Populism, xenophobia and nationalism have led to a dramatic deterioration in African-European relations.

Cluster 5:

A world at risk: tackling global challenges through innovation

19 ▷ African Innovation Potential

Africa has successfully used its technological and digital potential to develop solutions for pressing global challenges (e.g. smart cities, urban agriculture, pandemic response, e-health). The continent exports its innovations to Europe and the world.

20 ▷ Cooperation on climate change

Climate change created momentum for cooperation. Africa and Europe were able to align their policy response in the face of a common challenge.

21 ▷ A radical green transition

The external dimension of Europe's Green Deal has provided strong impetus for a radical green transition and energy access for all in Africa.

22 ▷ Pandemic preparedness

As an issue of cross-cutting importance for both continents, joint African-European pandemic forecasting and response strategies are in place.

This chapter summarises and analyses the expert interviews and the ratings of the theses of the Realtime Delphi survey for each cluster. Both parts are illustrated by quotations from participants.

4.1 Cluster 1: Cooperation in a new global order: how can we transform multilateralism?

4.1.1 What we learned from the expert interviews

The **changing global order** has been discussed to affect the African-European relations on several dimensions. In **'a world of more equal partnerships between regional blocs'**, Europe's relative importance is declining. In this context, seeking cooperation with Africa (while also competing with other players such as China, Russia or India) is not limited to the economic sphere but also has a geopolitical dimension. Against the background of a deteriorating rules-based international order, Europe should be interested in **'strong African partners for a strong multilateral system.'** Interestingly, several interviewees regard the relative weakness of the EU and the AU (both perceived as not really united or speaking with one voice) as a potential window of opportunity: with both institutions currently undergoing the same struggle, **'it could become an opportunity that both continents are not centres of hard power, either because they are not ambitious, or because they don't have the means.'** Joining forces around this shared predisposition could bring the two continents closer together: they might opt to **'see global challenges together [and] fix things through multilateralism (...).'** According to several interviewees, there is enough momentum and opportunity to make reform of the multilateral system a common future endeavour, not least because **'Africa and Europe together form more than half of all countries globally.'**

Many interviewees also regarded it as vital for the EU to identify a new, **'alternative value proposition'** in its future relations with Africa. What can the EU actually offer that others cannot (for example, shared advocacy for the multilateral system, its experience of integration, support for a green transition or its social welfare model)? And how can the two continents transform their cooperation into a real partnership of equals? Many experts regard it as crucial for future African-European relations that **'Europe should invest, NOT help'** if it is to achieve real partnership and thus abandon its donor mentality towards Africa. In achieving this new kind of relationship, **Africa's economic potential** is regarded as one of the most important issues to tackle, with jobs and young people taking centre stage in future. This is considered as both an opportunity and a risk, and much will depend on whether jobs can be created and the continent's demographic dividend successfully harnessed. Investing in local African companies, SMEs, start-ups and innovation, thereby fostering the local value chain, has been highlighted as crucial for the EU. Many experts emphasise not only the mutual long-term economic benefits of such an approach but also its empowerment potential: **'for European countries to have a good relationship with Africa, it is important not just to sell products to Africa but to help Africa to build up [its] own markets.'**

They also consistently underlined the fact that other players, such as China, Saudi Arabia and Turkey, would be ready to fill the void if Europe were unable in the future to address Africa's economic demand to make the relationship between the continents **'more symbiotic'**.

In this context, some experts also formulated expectations of the EU in terms of **transforming the global trading system**. For Africa to be able to operate on a truly level playing field, Europe should leverage its political and economic weight in reforming global trading rules and institutions. **'Finding solutions to how African countries can gain better access to the world market'** – for example, by ending import barriers for African products or importing **'high value'** products from Africa – should be a central element of cooperation but **'the market philosophies have to change for this, from the still dominant liberal ideas of the free market to offering protected opportunities to sell on global markets. Africa should be given better trade opportunities with respect to both industry and agriculture.'**

As another way of supporting African trade and economy, **infrastructure** – both via its external and internal dimension – was identified as a key area in which future African-European cooperation could take place. In terms of foreign trade, insufficient or absent infrastructure such as ports and harbours further undermines Africa's global trading potential. Internally, important projects like AfCFTA would need to be accompanied by credible infrastructure investments. Many interviewees expressed disappointment that so far, **'internal trade within Africa is missing (…).'** Once again, **'Europe needs to strengthen Africa by helping Africa build up their trade within itself. With the current infrastructure situation, it is more expensive to sell a product in Africa than to sell [it] in Europe. European companies sometimes have better tariffs than Africa-Africa trading companies. This is bad for credibility.'** Interestingly, the views of African experts in particular are divided whether to opt to rely on Chinese support in this regard or to encourage European investment, given its supposedly greater reliability and expertise: **'Africa (…) needs to deliberately encourage (…) countries to develop 'super projects'**

or 'mega-engineering projects' (…). Support in the form that China provides is not needed. For the European Union, it is not trial and error; they have done it before and therefore have the expertise. But can Africans incentivise the Europeans to go to Africa and engage in activities like construction and high-level infrastructure?' Adding to this, some interviewees also highlighted the risks accompanying external investment in this critical area, since foreign players' influence might well also provoke spill-over effects from infrastructure to politics. In this context, some experts have warned, for example, that **'if China continues to grow in Africa, Africa will copy China.'**

At institutional level, many interviewees regard the **lack of coordination and coherent positions** as critical on both continents: **'Neither Europe speaks with one voice, nor does Africa'**. Inside the EU, this relates not only to a disconnect between member states' bilateral strategies but also to 'turf wars' between EU institutions, such as EEAS and DEVCO. While bilateral agreements often conflict with a common EU approach, finding a balance between treating Africa as a whole without ignoring its regional differences was also identified as a major challenge. Further aggravating this is a perceived **lack of implementation**, particularly by the EU. One interviewee stated, for example, that everything that is needed has long been outlined in the Agenda 2063 and that there is no need for new programmes or visions, since **'everything is in there.'** Another expert criticised the **'disconnect'** she sees **'between the ambitions we have and the capacity and means we put at [their] disposal.'** To make African-European relations a more serious undertaking in the future, some interviewees deemed it **'necessary to temper expectations'** but also to ground ambitions in actions (the latter has been particularly mentioned with a view to the German EU Council Presidency). Some interviewees see a lack of honesty in EU rhetoric and consider this to pose a serious threat to future relations.

Closely aligned to this is the question of how to design **future development policy**. Many experts asked whether, and when, Official Development Assistance (ODA) is actually required and appropriate. In this regard, they argued for more diversified development

cooperation that differentiates between regional approaches where possible and country-specific cooperation where needed and controversially discussed the principle of conditionality. Though it was widely emphasised that **'the values we share'** form a distinct characteristic – the 'unique selling point', so to say – on which cooperation between Africa and Europe is based, aligning standards and principles sometimes runs the risk of one-sided imposition. According to many interviewees, mere **'conditionality is not going to build the trust needed'.** Instead, they favour a dialogue-centred approach. Safeguarding common values while simultaneously accepting more openness towards non-Western perspectives requires a balancing act and is challenging yet necessary in a context of growing competition and in order to stay abreast of increased 'African Agency'.

4.1.2 Assessment of theses: results of the Realtime Delphi survey

Cluster 1 is characterised by a particularly high degree of uncertainty and controversy, indicating that both Africa and Europe find themselves at a crossroads. Though many participants generally consider that taking cooperation to the next level is both desirable and influential, possibility ratings throughout the cluster support the assumption that, in the current state of relations, 'everything is on the table'. Which path to choose – alienation or approximation – therefore seems to be a pressing decision that can no longer be shelved, in particular given the tectonic shifts the global order is experiencing.

The following theses were assessed in the Realtime Delphi survey.

Thesis 1: Europe is Africa's preferred cooperation partner as the continent benefits from the EU's experience as social welfare and economic integration model.
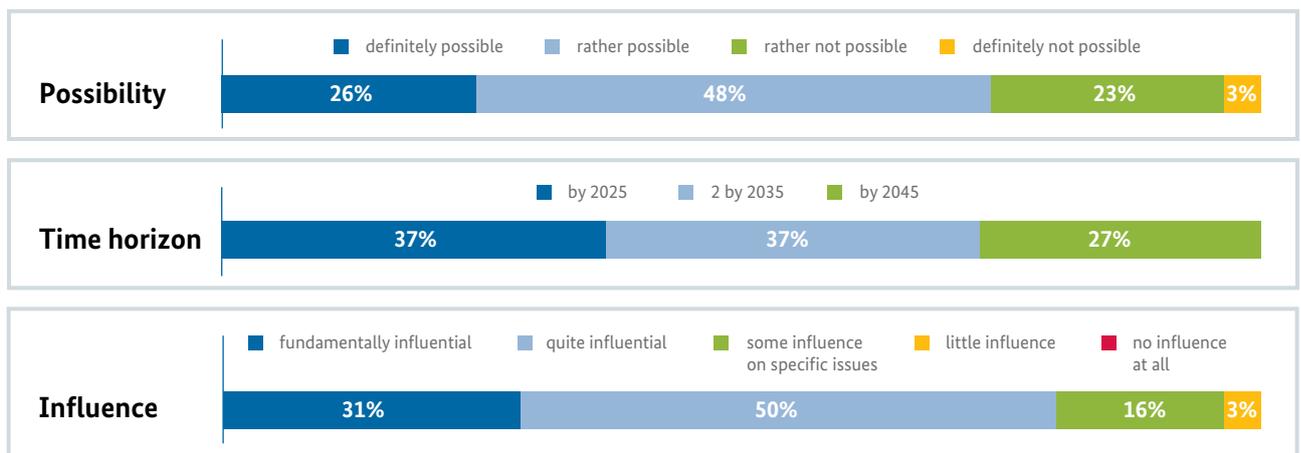
Nearly three quarters of the participants rate the thesis that Europe will be Africa's preferred cooperation partner as 'definitely possible' or 'rather possible', but there is considerable disparity in their estimation of the time horizon. The vast majority consider this thesis as 'fundamentally influential' or 'quite influential'.

Many participants stress that Europe and Africa **'share a lot'.** Nonetheless, experts seem to be highly divided as to whether, and when, Europe will be Africa's preferred cooperation partner in the future or whether Africa will choose from a variety of partners in line with the task at hand. With many differing

"Europe remains an attractive model for Africa. Its values, its rule-based societies, [and] its attitude as a forerunner in the fight against global threats will continue to provide identity and guidance."

geopolitical interests in the region, Africa has a choice. While a majority confirm this thesis (1) in favour of Europe, the counter-thesis (2)- Africa teaming up with more like-minded partners – is also seen as possible by a majority of respondents (see thesis 2 below). The shared history of the continents, the quality of EU assistance (e.g. in training and standards), its perceived credibility as a cooperation partner in comparison with other players and the experience it offers with its integration model are all mentioned as assets to cooperation. However, many experts call for a **'deeper, but different partnership with Europe'.**

Thesis 2: Africa, seeing little value in European cooperation, has teamed up with more like-minded partners to address the continent's most pressing challenges and opportunities (such as urbanization or leapfrogging).

	definitely possible	rather possible	rather not possible	definitely not possible
Possibility	45%	34%	20%	1%

	by 2025	2 by 2035	by 2045
Time horizon	50%	41%	9%

	fundamentally influential	quite influential	some influence on specific issues	little influence	no influence at all
Influence	40%	37%	16%	6%	
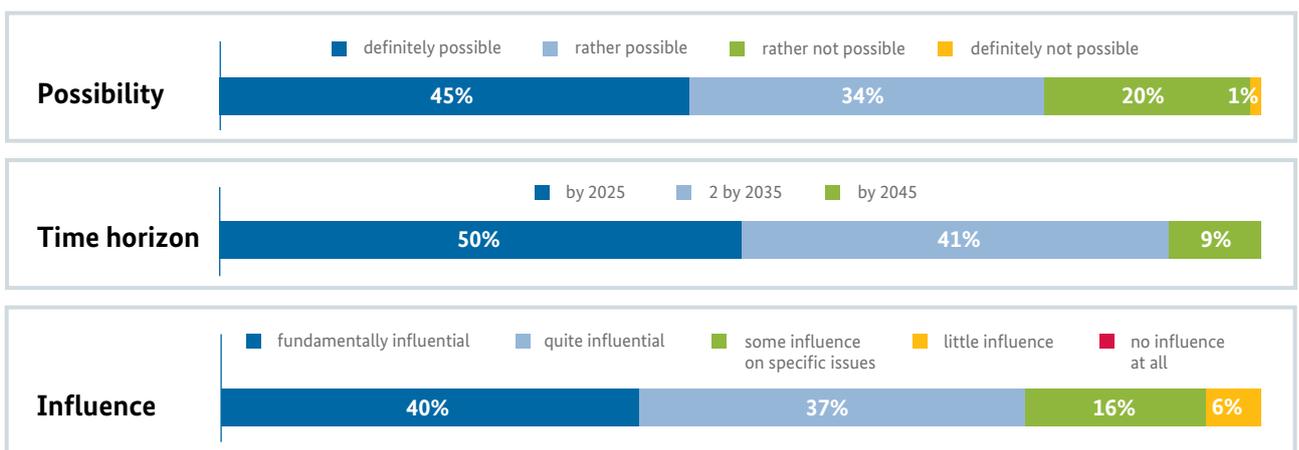
This is the counter-thesis to thesis 1. Both trends – closer and weaker cooperation – are considered possible. More than three quarter of respondents think it is possible that Africa will join forces with other, more like-minded partners, with almost half of the respondents rating it as 'definitely possible'. Interestingly, this development is estimated to be possible within a shorter time horizon than thesis 1.

Almost 80 % rate the influence of this thesis as either 'quite influential' or 'fundamentally influential'.

European participants attribute significantly greater influence to this development than those from Africa. Africans, by contrast, rate the thesis as significantly highly more desirable. From their perspective, it might seem preferable to have a choice of whom to partner

23

	fundamentally influential	quite influential	some influence on specific issues	little influence	no influence at all
Africa	37%	16%	32%	16%	
Europe	43%	48%	9%		

	very desirable	rather desirable	rather not desirable	not desirable at all
Africa	38%	13%	38%	13%
Europe	10%	15%	32%	44%
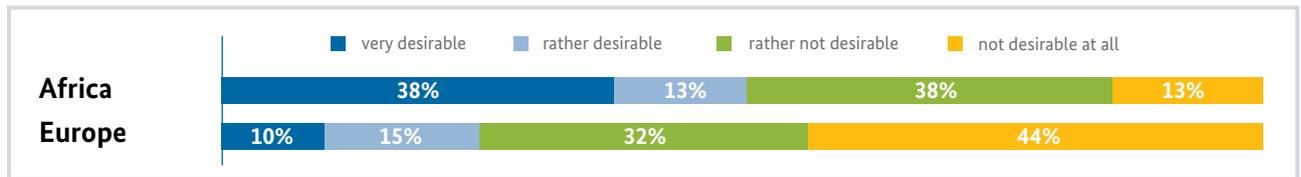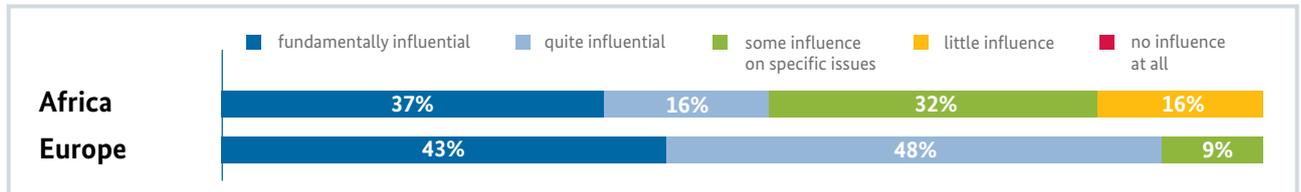
with. In the long run, the world might see **'Africa cherry picking to get the best out of any cooperation with different kinds of partners'**. China, Turkey, Saudi Arabia and Russia are the most significant partners mentioned, but India and Brazil are also contenders. These partners not only take a more pragmatic and less conditionality-driven approach to cooperation with Africa but are also regarded as better informed on key future topics (such as urbanisation and digitalisa-tion). Some experts also argue that Africans do not see the benefits of cooperation with Europe, which is perceived to take place mostly on the declaratory level between the EU and the AU.

In terms of time horizon, participants expect this development to take place in the short to medium term. Europe and Africa thus seem to find themselves at the crossroads: now is the time to act.

Thesis 3: The two continents have re-shaped the international order the 'African-European way', strengthening soft power and rules-based multilateralism.

	definitely possible	rather possible	rather not possible	definitely not possible
Possibility	27%	32%	34%	6%

	by 2025	2 by 2035	by 2045
Time horizon	15%	49%	36%

	fundamentally influential	quite influential	some influence on specific issues	little influence	no influence at all
Influence	60%	28%	7%	5%	
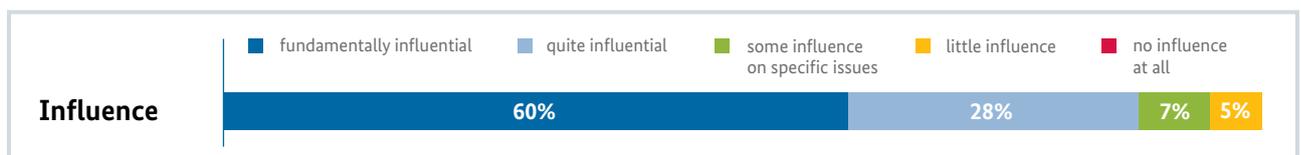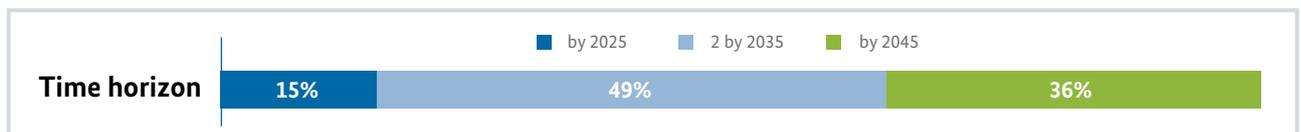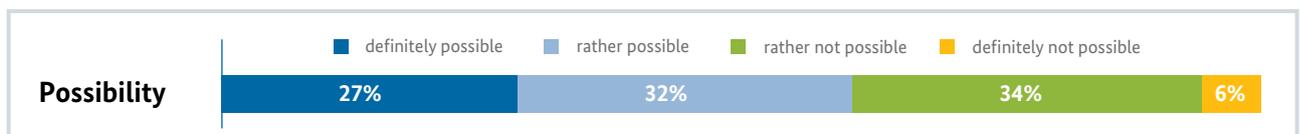
This thesis received extreme ratings. If realised, it is estimated to have the biggest influence of all 22 theses, with more than half of the participants considering it 'fundamentally influential' and a further quarter 'quite influential'. At the same time, there is disagreement on its possibility. What one expert refers to as **'cooperation of a people-to-people approach, with mutual respect'** is by many seen as a long-term issue that **'seems not to have taken shape in the last few years.'** As highlighted by several experts, soft power might play a significant role in the post-pandemic area. **'Economic and cultural diplomacy'**, for example, **'would be of added advantage to both continents' post-Covid-19 recovery'**.

	definitely possible	rather possible	rather not possible	definitely not possible
Public sector	50%	22%	28%	
other sector	18%	36%	36%	9%
Science	9%	27%	45%	18%
other sector	31%	33%	31%	4%
Africa	37%	47%	11%	5%
Europe	18%	28%	46%	8%
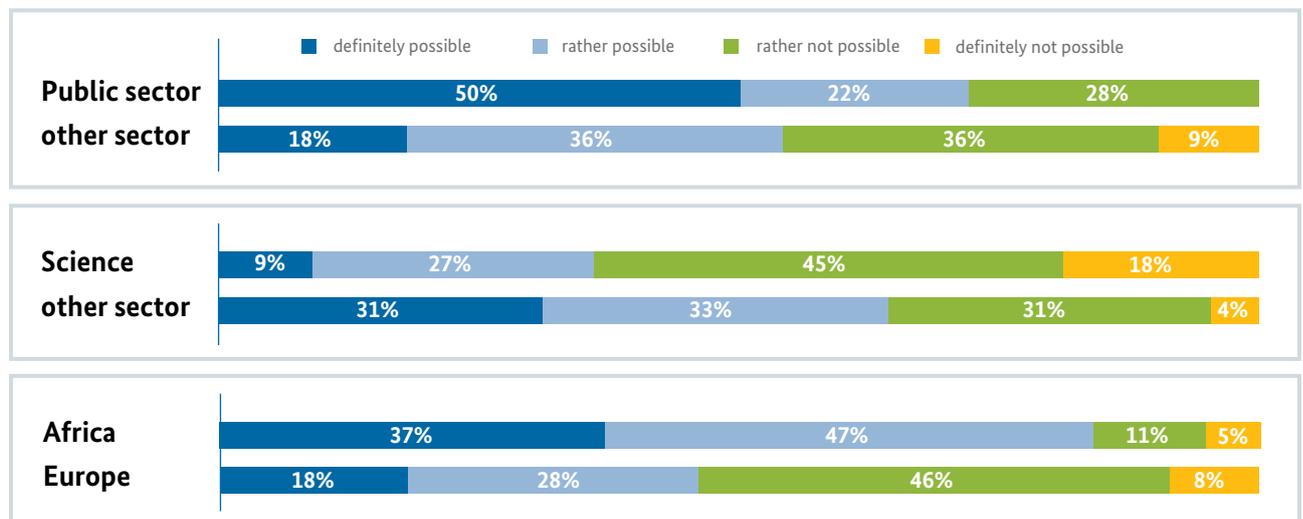
Africans and the public sector are much more optimistic than Europeans about this trend. More than 80 % of African participants consider it as 'definitely possible' or 'rather possible' as against under half of European respondents. More than 70 % of participants from the public sector rate this thesis as 'definitely possible' or 'rather possible', but experts from academia are more sceptical.

Taken together, experts are divided between optimists and pessimists as regards shaping the multilateral arena. While an African-European model for the international order that is based on soft power and shared values describes a future that many experts would like to see, there is disagreement over how possible it will be to achieve. Alongside increased competition from other players over the form and shape of the global order, the lack of coherence at continental level in both Europe and Africa (let alone beyond) is considered a major obstacle. If the two continents are to strive for this 'high-hanging fruit', many experts regard it as vital that young Africans be given a voice and that Europe sheds what they perceive as its **'patronising attitude'** towards Africa. Most interestingly, though, several experts place a huge emphasis on interpersonal relations when dealing with the multilateral arena. Only through societal rapprochement, such as mutual learning, business cooperation and cultural diplomacy, can a common identity be fostered and serve as a prerequisite for jointly shaping the international system.

Thesis 4: The EU has leveraged its economic weight in order to re-structure global trading mechanisms and institutions (such as the WTO) in a way that is just and beneficial for both continents.

Possibility

definitely possible | rather possible | rather not possible | definitely not possible

| 13% | 47% | 35% | 5% |

Time horizon

by 2025 | by 2035 | by 2045

| 29% | 52% | 19% |

Influence

fundamentally influential | quite influential | some influence on specific issues | little influence | no influence at all

| 44% | 39% | 15% | 3% |
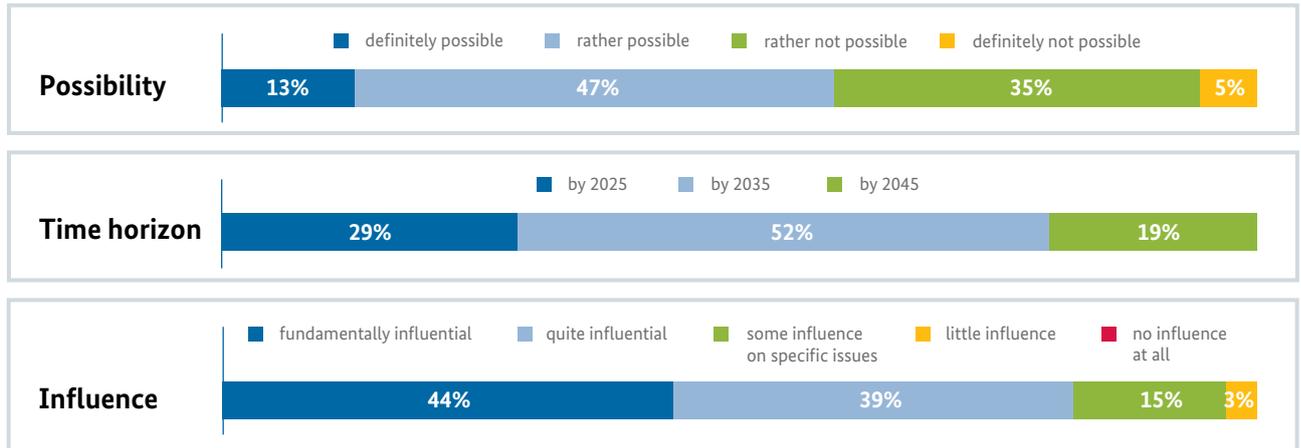
Participants are divided on whether global trading mechanisms and institutions will be re-structured in a fair way. 60 % of the participants rate this as possible, yet very few see this development as 'definitely possible'. 40 % rate it as 'rather not possible' or 'definitely not possible'. If new global trading mechanisms are to be achieved at all, then a time horizon of around 2035 is estimated, given that the development is **'worth striving** [for]**, but unrealistic to the current state'**. The public sector seems to be more optimistic in this respect.

by 2025 | by 2035 | by 2045

Public sector | 50% | 50%

other sector | 20% | 53% | 27%

very desirable | rather desirable | rather not desirable | not desirable at all

Africa | 60% | 30% | 5% | 5%

Europe | 84% | 13% | 3%
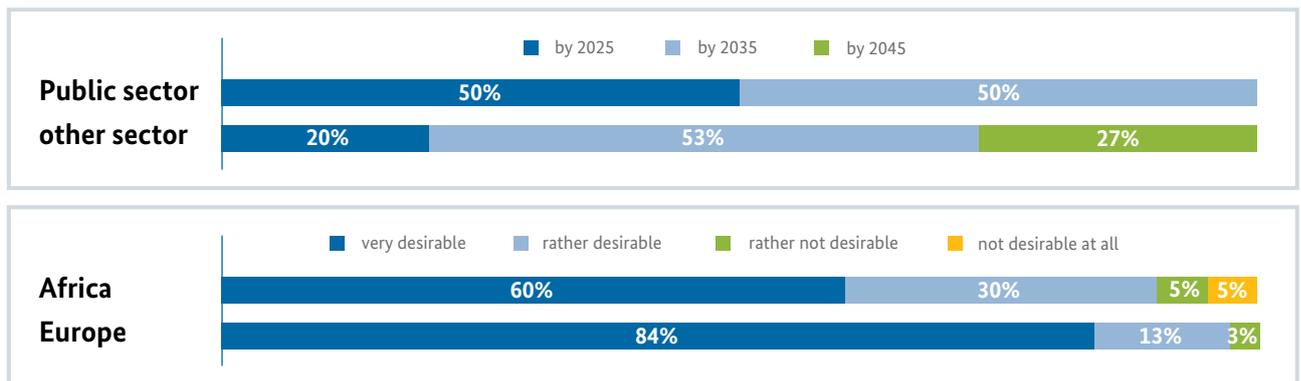
The EU leveraging its weight for the benefit of more equitable global trading mechanisms is considered to have a huge influence on African-European relations, with more than 70 % rating it as 'fundamentally influential' or 'quite influential'. Moreover, it is regarded as 'highly desirable'. Europeans rate this as even more desirable than their African counterparts, with 84 % and 60 % respectively of 'very desirable' ratings.

In sum, the reform of global institutions and the re-calibration of trading mechanisms evokes a sense of scepticism among respondents. Similar to the transformation of the global order, participants view this issue as extremely important and highly desirable yet difficult to achieve. The EU's internal weakness, its ambitions to protecting its own market (particularly in the area of agriculture) and its neoliberal stance on

"If a majority of Africans had the power to earn a sustainable income, this would end the dependence on state subsidies, foreign aid and remittances. Energy and attention could finally focus on the aim, impact and depth of an African-European relationship."

policy-making (as, for example criticised, with a view to the Economic Partnership Agreements) are considered to be almost insurmountable obstacles. Success in this realm would need to follow an approach that is

truly beneficial for both continents. Some of the interviewees name the 'Everything but Arms' and 'Aid for Trade' initiatives as positive examples.

Thesis 5: African and European states have managed to find a common voice vis-à-vis their partner continent. They now implement comprehensive strategies jointly, and have overcome fragmented policy choices.

Possibility

definitely possible | rather possible | rather not possible | definitely not possible

| 14% | 36% | 42% | 8% |

Time horizon

by 2025 | by 2035 | by 2045

| 33% | 38% | 28% |

Influence

fundamentally influential | quite influential | some influence on specific issues | little influence | no influence at all

| 48% | 40% | 10% | 2% |
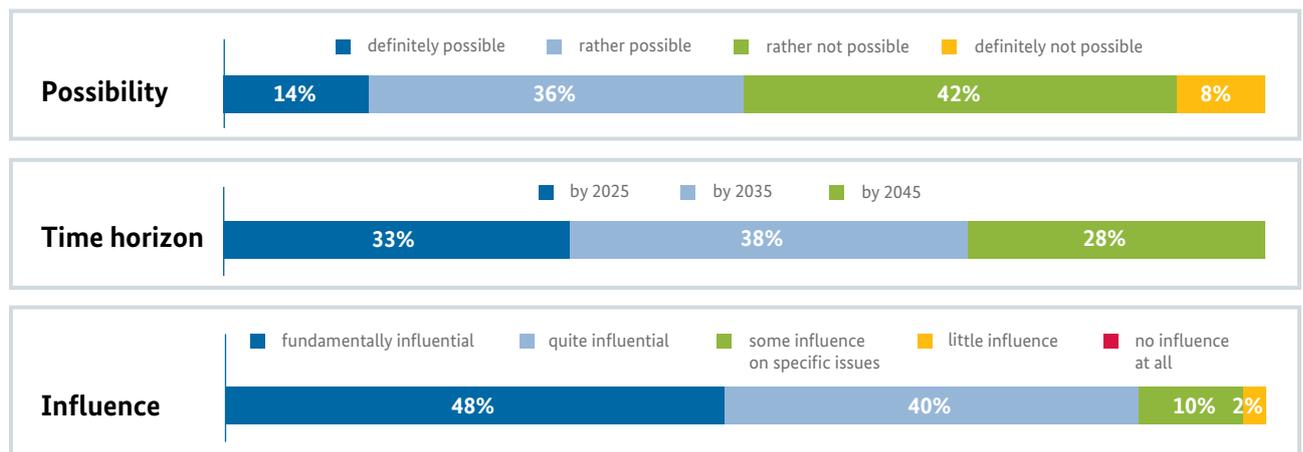
Whether African and European states manage to find a common voice is the thesis over whose possibility there is most disagreement. Participants split into two groups of equal size. About half see such cooperation as possible, but **'primarily on some specific issues and on vague strategies.'** The other half is more sceptical and assume a continued predominance of bilateral strategies.

Despite this ambiguous rating and an unclear time horizon for realisation, the thesis is considered to have an extremely high and widely agreed-upon influence, with almost 90 % rating it as 'fundamentally influential' or 'quite influential'.

The optimists among the participants identify strong efforts and political will on both sides to achieve common and coherent positions vis-à-vis each other (particularly since the second EU-Africa summit in 2007). Even if strong cooperation is unlikely to happen across all issues at the same time, an awareness of mutual and important challenges (such as pandemics and climate change) and the need to jointly tackle them could form the cornerstone for more coherent strategies both at continental level and between Africa and Europe. The sceptics, by contrast, see huge obstacles in the high number of stakeholders and interests at play, the diversity of the continents (particularly in the case of Africa), and the gap between rhetoric and actual implementation.

Thesis 6: The EU has given up its established development aid approach based on conditionalities and responded to African demands for more direct investment, trade and joint projects.
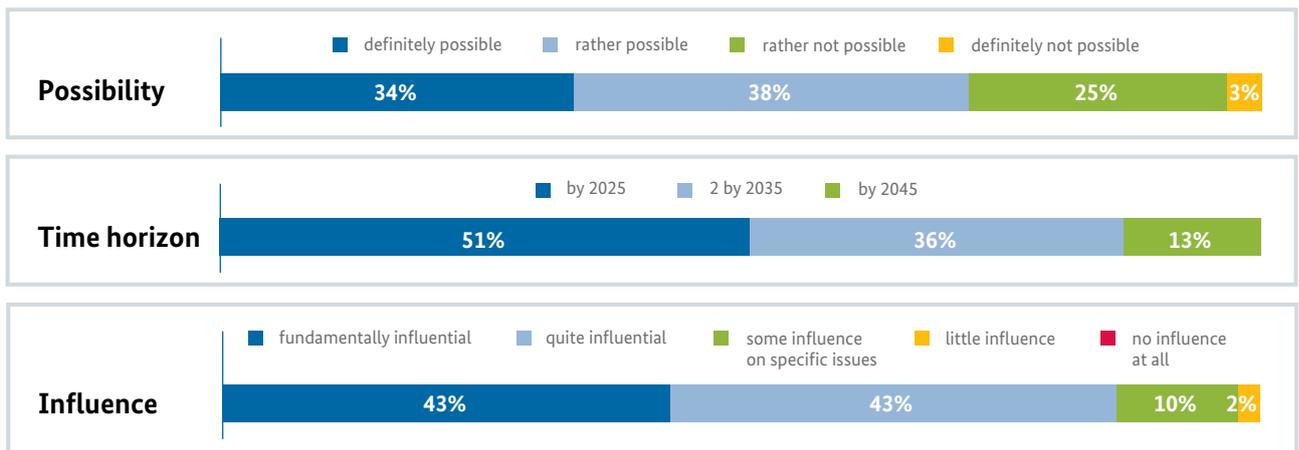
Giving up traditional ODA is estimated by more than 70 % of respondents to be 'definitely possible' or 'rather possible' in the very near future. Its influence is rated high, with the vast majority considering it as 'fundamentally influential' or 'quite influential'. However, there is disagreement over the desirability of this thesis, with some respondents opting for more direct investment to replace aid while others argue that mere investment without real aid is leaving many behind and yet others consider the differentiation between aid and conditionalities and direct investments as less important.
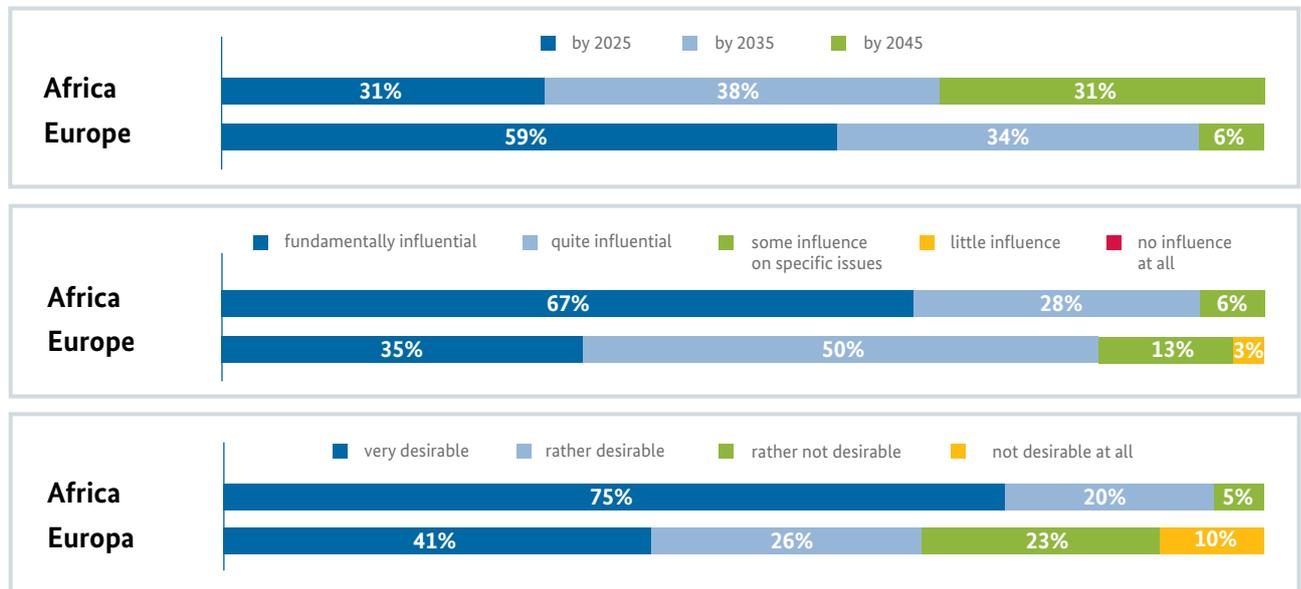
This assessment reflects the significant differences between Europe and Africa in ratings of time horizon, influence and desirability. Africans rate the influence of the thesis significantly more highly and also rate it as significantly more desirable than their European counterparts. European participants, by contrast, expect earlier realisation.

In order to renew relations, African experts in particular believe a new approach to development cooperation is necessary, which most experts think is already in the making. While many argue for the benefits of this new approach, however, others point out its inconsistencies. On the one hand, ODA and conditionalities are seen as ineffective or even dysfunctional, incapable of deepening trust and increasing accountability and, at worst, creating dependencies and strengthening ineffective bureaucratic systems. On the other hand, some experts warn that the EU should not follow a 'no strings attached' approach, since they hold it to be the EU's central distinguishing feature to 'care about social, environmental and governance related aspects'. Moreover, while more business-focussed cooperation might lead to stronger economic and political relations, marginalised groups and fundamental development questions could fall behind. In consequence, most experts argue for a mixed approach that involves traditional development assistance and conditionalities where needed but also steps up direct investment. Such an approach could have the potential to connect more Africans to Europe and vice versa. It would, however, also require a 'radical shift of mindset' that moves away from prioritising former colonies and instead embraces a continental African approach.

4.2 Cluster 2: Shared history, common future? – What it takes to start over

4.2.1 What we learned from the expert interviews

One of the most hotly debated topics in the interviews conducted during the first project phase was the question of how to deal appropriately with the two continents' **shared colonial history.** While only a few interviewees argued in favour of **'putting aside the colonial past'**, several – on both the African and the European side – emphasised the need for in-depth efforts to come to term with the colonial heritage so that it does not become a burden on future cooperation. Many interviewees felt that a degree of ignorance and lack of sensitivity persisted in European rhetoric that **'trigger** [a] **mindset of colonialism'.** More specifically, they pointed out that there is still uncertainty over whether individual EU member states' colonial ties with African states could be harnessed in terms of linguistic and cultural proximity or whether resentment towards these member states would, in the long term, undermine the EU's reputation.

Closely connected, and of equal importance for the interviewees, was the issue of **'African Agency'** – Africa's capacity to act. In its attitude towards Africa, Europe was criticised for taking a paternalistic approach that **'forgets that Africa has ideas, too.'** Experts on both sides stressed that African solutions to African challenges do exist, for example with regard to security (e.g. an AU-designed peace plan for Libya) or climate change. African countries, they argued, have themselves come up with innovative and tailor-made ideas for tackling climate change while also arguing for a re-orientation towards traditional African values and concepts.

In particular vis-à-vis a **generation of young and self-confident Africans,** Europe should not take its partnership with the continent for granted. In this regard, one interviewee pointed to the growing empowering potential of **'pan-Africanism among youth.'** Another saw the substantial risk of the **'total breakdown of the relationship', since the 'younger generation will have the lens of being global citizens'** and will not perceive Europe as Africa's naturally given partner continent. Yet taking account of young people´s perspectives is not confined to the African side. To put future relations on a more solid footing, many interviewees also highlighted the need to **'link** [the] **youth of both continents'**, since this is perceived as an often-ignored and largely unaddressed issue and thus as a further risk to undermining future relations between Africa and Europe.

Broadening cooperation and making it more inclusive was considered important in advancing **a new narrative in African-European relations.** Cooperation should not be reduced to the technical and political level. To intensify and improve relations, reduce prejudice and tackle stereotypes, people's mindsets need to be altered. In this regard, one interviewee pointedly remarked that the notion **'of poor Africans on refugee boats has to change. We also need to see the new middle class in African smart cities.'**
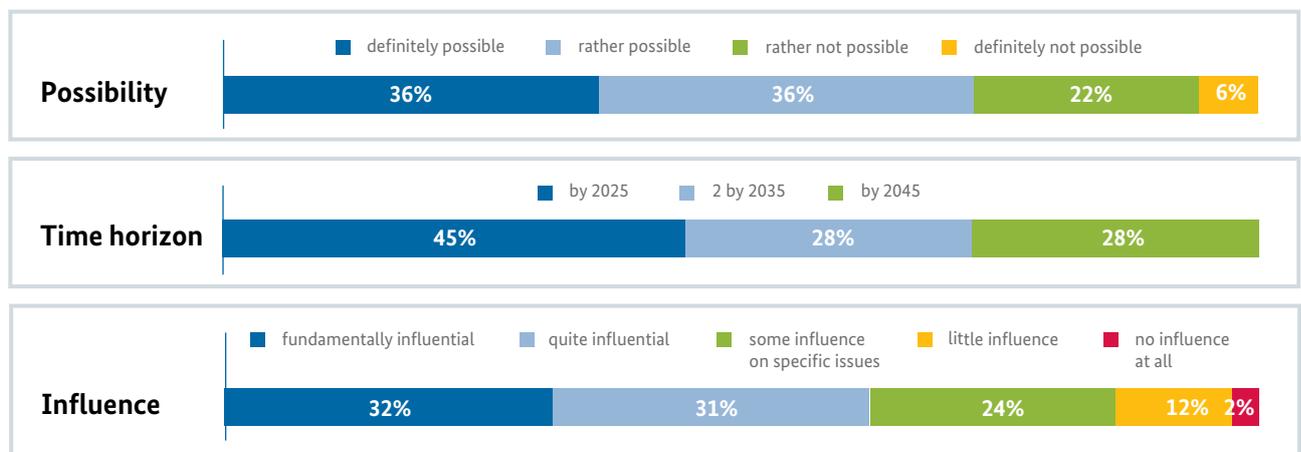
4.2.2 Assessment of theses: results of the Realtime Delphi survey

The theses in cluster 2 deal with the implications of colonialism as well as with the current and future perceptions of Africa and Europe towards each other. Will Europe continue to be a point of reference or will it gradually become less attractive?

The dominant focus of this cluster was the growing self-confidence of the African continent. Yet while the majority positively acknowledge this development, many experts also perceive obstacles to its full realisation: externally, a new 'scramble for Africa'

might undermine self-rule in the long term, while domestically, weak leadership and a lack of unity are hampering Africa's ability to enforce its own interests at continental level. Special emphasis was placed on the potential represented by Africa's young population. Many experts also assessed the way in which Europe deals with its colonial past and the extent to which Africa can determine its own terms of engagement as particularly influential on future African-European relations.

Thesis 7: Young Africans no longer connect to the cultural and geographic proximity between the two continents, and rather regard themselves as 'global citizens'.

Possibility	definitely possible	rather possible	rather not possible	definitely not possible
	36%	36%	22%	6%

Time horizon	by 2025	2 by 2035	by 2045
	45%	28%	28%

Influence	fundamentally influential	quite influential	some influence on specific issues	little influence	no influence at all
	32%	31%	24%	12%	2%

The majority of experts assume that young Africans may be less interested in their cultural and geographical proximity to Europe. Almost half of respondents expect this development to happen in the very near future (by 2025), with about two thirds of participants considering it 'fundamentally influential' or 'quite influential'. Europe is no longer the main point of reference, either culturally or educationally, and especially against the backdrop of ever more stringent migration rules in Europe. In the respondents' view, this is on the one hand the result of social media, travel and exposure to new and global trends accompanying life in megacities: **'As global contacts increase (...) young people in Africa do not only look to Europe any more. Chinese culture, Arabian habits, Indian food and global urban living are new role models to emulate.'** On the other hand, they argue, it is also a response to a growing awareness among young people of the long-lasting harmful impact of colonisation and the desire to forge a truly African identity. Some experts see this as a trend that might even lead to a stronger relationship, since a future African elite speaking on its own behalf and formulating its own ideas and homegrown solutions might contribute to more balanced and healthier and, thus, more legitimate cooperation with Europe.

Thesis 8: The colonial past of Europe in Africa has not been processed. This seriously deteriorated the relations between the two continents.

Possibility	definitely possible	rather possible	rather not possible	definitely not possible
	41%	33%	25%	

Time horizon	by 2025	2 by 2035	by 2045
	45%	43%	13%

Influence	fundamentally influential	quite influential	some influence on specific issues	little influence	no influence at all
	33%	41%	11%	13%	2%
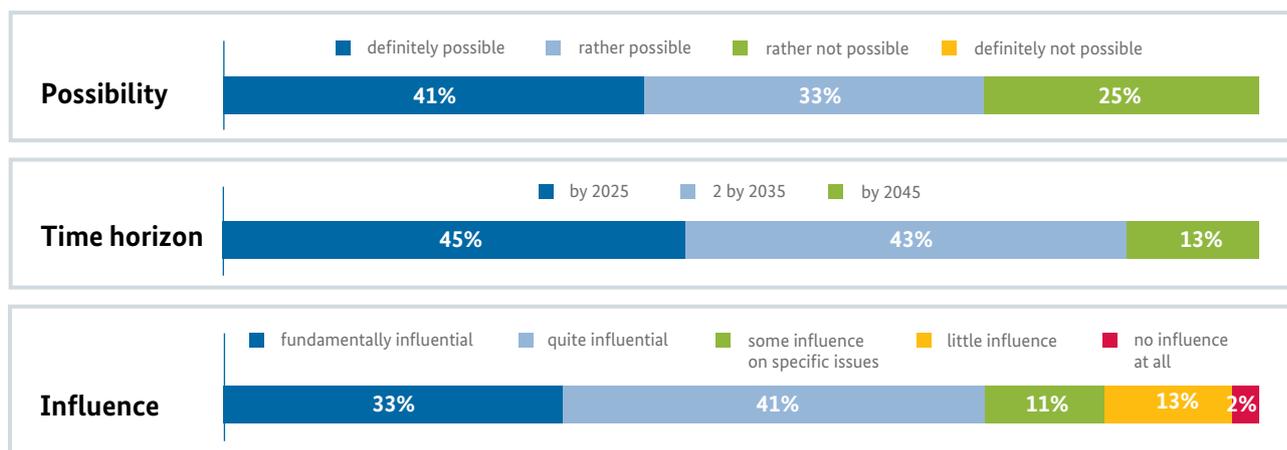
A majority of participants consider a lack of engagement in processing the colonial past and a subsequent deterioration in relations to be possible. However, they are divided as to the time horizon in which relations might deteriorate in such a scenario.

	fundamentally influential	quite influential	some influence on specific issues	little influence	no influence at all
Civil Society/ NGO	50%	44%	6%		
other sector	27%	40%	13%	18%	2%
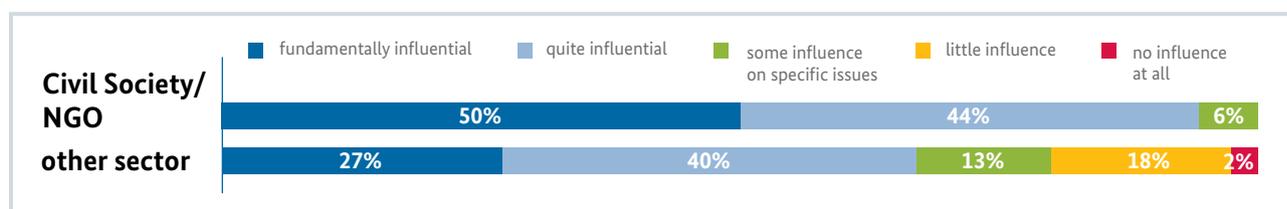
This thesis is rated as 'fundamentally influential' or 'quite influential' by more than three quarter of respondents, with the remaining quarter that only see 'some influence', 'little influence' or 'no influence at all'. In a breakdown of respondents' backgrounds, those from NGOs and civil society rate this development as significantly more influential than other groups. It is interesting to note that there is no significant difference in the ratings between African and European participants.

For many participants, this thesis portrays not the future but the present state of African-European relations. According to some participants, Europe has replaced historic with economic colonialism and fails to acknowledge its past mistakes (for example, by making reparations for injustices), a situation that

African young people in particular are perceived to be losing patience with. According to one participant, **'African states are able to diversify their relations with many other, non-Western European partners which often show a less patronising attitude. This may fundamentally influence the EU-Africa relations, by making them less relevant in the perception of the African states.'** However, participants see the obligation to overcome this situation on both sides: Europe might not be pro-active enough in turning cooperation into a partnership of equals, they argue, but African countries still resort to their colonial history as an excuse for their own weaknesses and political shortcomings, such as corruption, lower educational levels, and inadequate freedom of speech or welfare distribution. Several respondents argue that both parties would first have to overcome their

"Overcoming misperceptions will significantly contribute
to a win/win interaction between both continents.
A constructive relationship built on trust and mutual learning
is fundamental to allow both continents to take the most
out of their mutual strengths, identify complementarities
and cooperate to address common threats like the pandemic
we are facing at the moment."

hidden agendas if they wish properly to address their history. Since European colonialism in Africa has caused **'deep-seated trauma, marred cultures, belief systems and identities'**, most participants see no option for Europe and Africa but to face history. As one expert argues, **'we will not get the idea of partnership if we don´t get over the issue of colonialism.**

**Thesis 9: 'African Agency' – the continent's capacity to act – is unquestioned.
Based on the principle of 'African solutions to African problems', the continent is
setting its own priorities and implements its strategies without external interference.**

	definitely possible	rather possible	rather not possible	definitely not possible
Possibility	23%	48%	21%	8%

	by 2025	by 2035	by 2045	
Time horizon	18%	41%	41%	

	fundamentally influential	quite influential	some influence on specific issues	little influence	no influence at all
Influence	48%	43%	6%	3%	
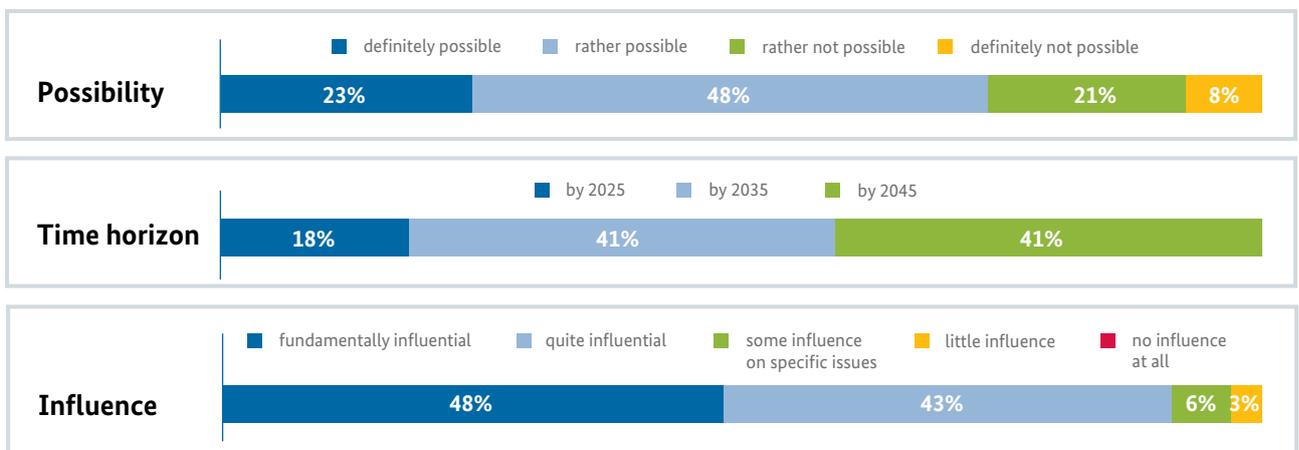
Respondents take different views of the possibility of Africa setting its own priorities and implementing its strategies without external interference, but more than 70 % are optimistic, rating this development as 'definitely possible' or 'rather possible'. Moreover, the vast majority also considered it 'fundamentally influential' or 'quite influential'.

	fundamentally influential	quite influential	some influence on specific issues	little influence	no influence at all
Public sector	28%	56%	11%	6%	
other sector	55%	39%	4%	2%	
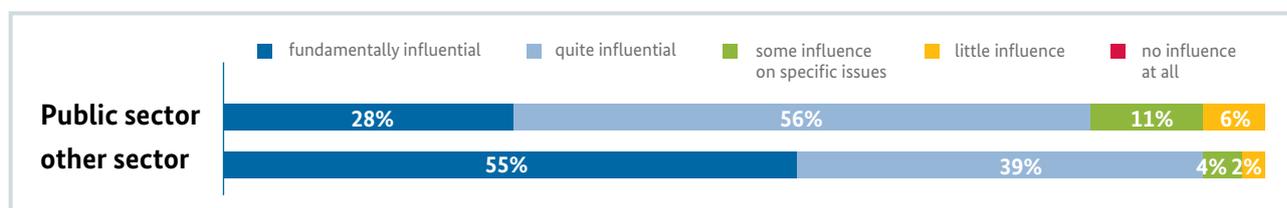
Though most participants see 'African Agency' as a key influential factor in putting the African-European partnership on a more equal footing, and the majority rate it as possible, they do not believe it will be achieved before 2035 at the earliest. Interestingly, the public sector does not attach the same importance to this issue as other actors. Respondents nevertheless rate it as possible because of a range of empowering factors. First, increasing numbers of people are now part of the formal African economies, gaining voice and leverage in decision-making. Second, young Africans are, at a cross-border level, becoming more pan-African, while at local level, they are **'driven to develop innovative solutions to address the problems in their communities.'** This innovative mindset is promoted by an awareness that foreign strategies often do not work in the diverse African contexts, which makes locally owne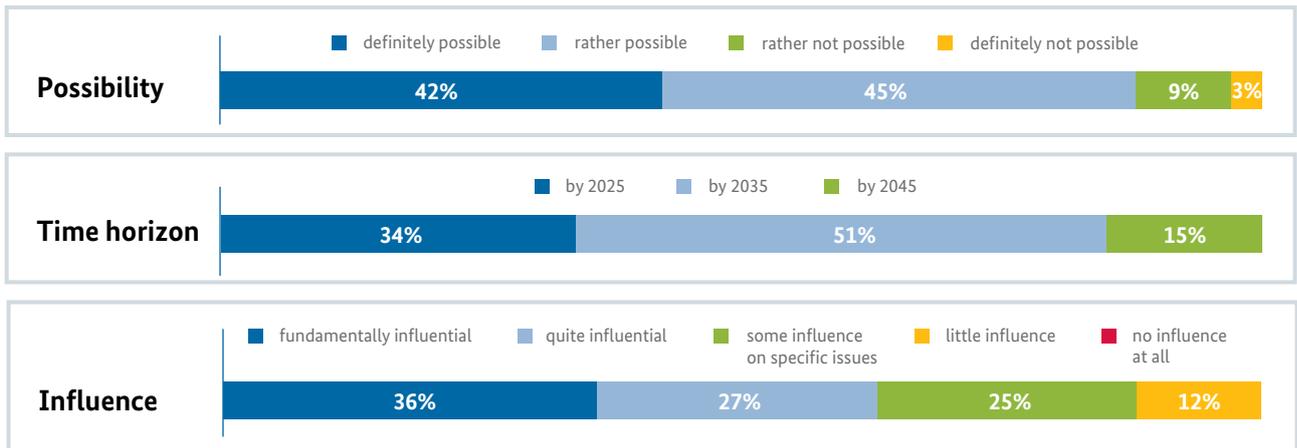d solutions even more prestigious. Finally, the geopolitical context in which many players vie for Africa's favour has given the continent room for manoeuvre and decreased its one-sided dependence. For others, by contrast, Africa's increasing entanglement (with China, the Middle East, Russia, the USA or Europe) might further contribute to the notion that **'the African continent is too important to other global powers'** to let Africa make its own decisions.

Internally, some participants see a **'sense of victimisation'** as an obstacle on the path towards agency in which some countries' political leadership blames outsiders rather than undertake a **'critical self-examination of domestic policies'**, as is, for example, urgently needed in agriculture. Although some projects, such as AfcFTA and the Agenda 2063, demonstrate Africa's willingness to engage in coordination at strategic level, implementation is hindered by internal differences, conflicts and agendas, a lack of political will and leadership, and the fact that the bulk of African resources is still in the hands of external actors. As one participant stressed, **'the institutional frameworks in Africa and the resources for African strategies are limited and depend for their functioning on support from Europe.'** Agency is, moreover, closely linked to African unity and, as such, contributes to the **'long-standing dream'** of the continent.

"Africa actually has three things going for it that speak to this possibility: youth; increasing confidence and creativity; and a well-practiced culture of dealing with multiple crises at once."

**Thesis 10: The African continent exports its pop culture and its
'African way of life' to Europe and the world, and a young and confident
middle class is setting the tone for global trends and lifestyle.**

	definitely possible	rather possible	rather not possible	definitely not possible
Possibility	42%	45%	9%	3%

	by 2025	by 2035	by 2045
Time horizon	34%	51%	15%

	fundamentally influential	quite influential	some influence on specific issues	little influence	no influence at all
Influence	36%	27%	25%	12%	

A very high degree of possibility is attached to the export of African pop culture and an 'African way of life'. This coincides with the median of the time horizon (by 2035), with only a few participants opting for a longer time horizon – and some even arguing that it is already happening. Differences are apparent, however, with regard to the influence of the topic, which a majority do not consider 'fundamentally influential'.

Thus, the question of whether the 'African way of life' could affect future African-European relations is, for many participants, a question of influence rather than of possibility. Most see it as a likely development, with African young people setting the tone. Given an ageing European middle class, this trend might become even more nuanced in the future, with **'young energetic cultural trends firstly spreading inside Africa within and among the mega-cities and overflowing into Europe along capital cities and cultural hubs.'** Some

participants point out, however, that the dissemination of culture continues to be largely controlled by non-Africans. This might also explain the ambiguity in the ratings of influence: **'people can enjoy and "consume" Africa without liking Africans'.** Evidently, it will take more than the export of culture to change peoples' minds. Though not regarded as extremely influential for Africa-European relations, a few experts see some potentially positive effects in terms of combating racism and xenophobia and better aligning the two continents, in particular at a time when the **'American way of life'** is fading. It is, finally, worthwhile underlining that some participants also questioned the very existence of 'the African way of life'. These voices see it as a rather reductive concept, since truly representing Africa would have to encompass and represent **'55 countries of different sizes, economies, cultures and dependencies.'**

4.3 Cluster 3: Changing perspective: a bottom-up approach to African-European relations

4.3.1 What we learned from the expert interviews

Re-focussing cooperation away from the state level, thereby opening it up to non-state actors, has been a recurring theme throughout the interviews, mostly – though not exclusively – on the side of African experts. This is justified by citing the weakening role of the nation state on both continents. Since non-state actors increasingly influence politics, they should be reflected accordingly in future cooperation strategies. This is particularly true of Africa, as one interviewee stated, **'Europe has institutions (…), however, in Africa, we lack institutions – here, we need to focus on individuals who have a voice and are powerful to act as change agents (…).'** Interviewees had an overwhelmingly positive opinion of the transformative potential of non-state actors, whether representatives of the private sector, women, young people, social movements, religious leaders, social and mainstream media, artists, academia, local leaders, elites, philanthropists and other influential individuals. While one interviewee argued, for example, for putting **'religious leaders in the centre of** [the] **action'**, since they enjoyed **'influence and strong respect, also from politicians in Africa'**, another highlighted that **'citizenry** [is] **very important.'** To make African-European cooperation work in future, many experts made the case for a **'framework to integrate civil society into politics, to increase its influence.'**

In the same vein, many interviewees highlighted the importance of more intensive **cultural and societal exchange.** To date, the relations between Africa and Europe have mainly been centred on politics and economics. To foster mutual understanding and respect and thus strengthen the future relationship, **'Africa could harvest from European countries and the other way round.'** Personal relations should be fostered, for example through **'initiatives that will send experts to different countries on a regular basis or scholarship programmes which invite African students to study in European countries.'** Moreover, several experts emphasised that learning from each other would not be a one-way street. Taking, for example, the issue of care work, one interviewee suggested that **'more Europeans should go temporarily to Africa to learn about the differences between African and European countries and learn from their culture, e.g. Africa is more family-based.'**

An area that is crucial to achieving societal exchange in the future is **migration and mobility.** However, though this issue was mentioned in almost every interview (and almost always as being of prime importance) as one of the most important areas influencing African-European relations today, many experts complain about the dominance and negative framing

attached to it. Many interviewees were critical of the fact that the **'migration topic is overestimated'** and also questioned **'why Europeans are so worried about African migration to Europe, whereas migration within Africa is much more prominent.'** Migration is seen as an example of the EU unilaterally setting the agenda when it comes to formulating policy priorities. A broad consensus exists among interviewees, that – if managed properly – migration could be beneficial for both continents, in particular with a view to their divergent demographic trends but also in the context of knowledge transfer and professional exchange. In

future, the demographic dividend represented by Africa's young population could add value to Europe while also being a catalyst for a new dynamic in cooperation by further rebalancing the relationship between Europe and Africa. However, many experts expressed disappointment that, so far, Europe has failed to **'formulate a clear response'** in its migration policy. According to some, the divergent views on the topic, with Europe framing migration as a potential threat and Africa regarding it as a driver of development, **'(…) will always be a tension in the relationship.'**

4.3.2 Assessment of theses: results of the Realtime Delphi survey

What are the soft game-changers, and who are the actors who will transform perspectives in and of African-European relations? Cluster 3 relates to this question and is closely interlinked with the previous issue.

What is particularly evident in this cluster is the desirability and significance that many experts attach to strengthening the bond between societies of Africa and

Europe, whether through the exchange of people, knowledge or culture. Changing perspective, however, takes time, as the medium- and long-term time horizons for achieving the theses in this cluster demonstrate. Interestingly, establishing digital platforms to harness divergent demographic trends on the two continents is a development that, nonetheless, many respondents expect to take place rather sooner than later.

Thesis 11: Intense societal and cultural exchange between Africa and Europe has become a game-changer. By building trust and altering perceptions, it has fundamentally re-balanced the power relationship between the two continents.
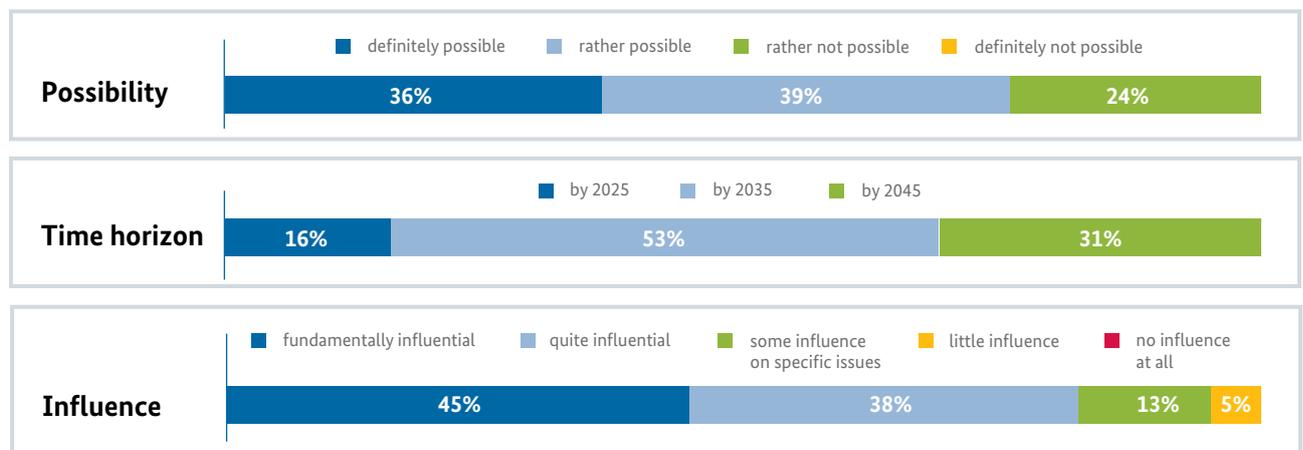
Participants in the Delphi survey see intense cultural and societal exchange between Africa and Europe as a longer-term issue, though over 70 % rate it as 'definitely possible' or 'rather possible'. With the continuous influence of migration, diaspora and tourism, and given the fact that dialogue and cultural exchange are now easier than ever before, several experts believe the foundations have been laid for such a development. Currently, however, a lack of mutual understanding and trust is having a negative influence on relations between the two continents. They therefore see an urgent need to create joint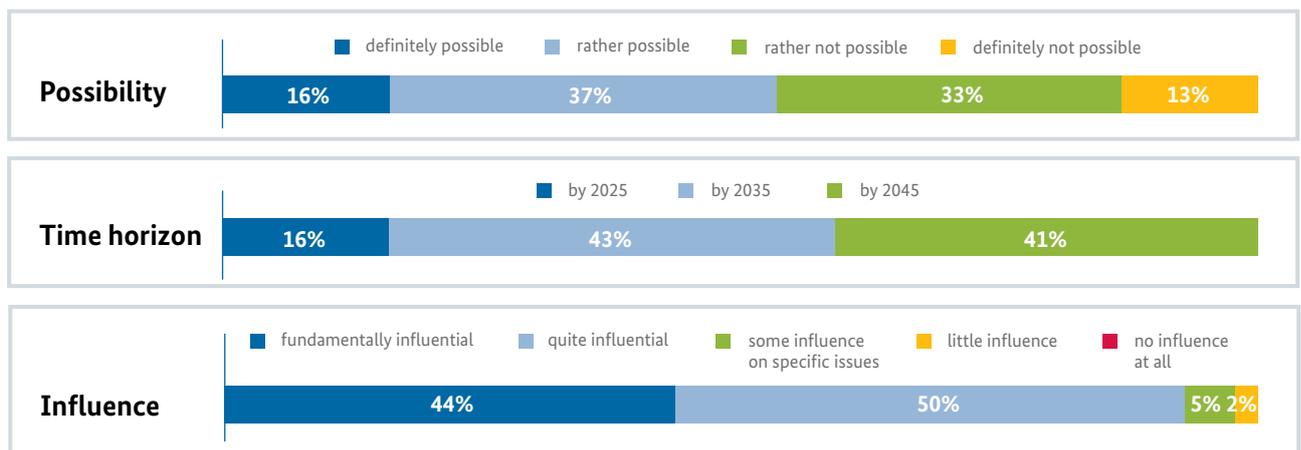 positive experiences. The influence of successfully bridging the current gap between African and European societies is evaluated as particularly high, with many experts arguing that **'if there is something that can drive a meaningful change in Africa-EU relations, it is societal and cultural exchange.'**

Some respondents are more pessimistic and do not see culture as a game-changer at all, calling it a **'Utopian view'** that does not directly solve problems or improve the economic situation and that does not attract real European interest. It is criticised as a naive view, **'assuming that it could fundamentally reshape the power relationship may be misleading and counterproductive'** and regarded as **'old thinking',** with the **'number of exchanges lower today than in the past'.** Moreover, they are sceptical about how to achieve such improved understanding in the light of historical imbalances and with a view to current political deadlocks, specifically in the area of migration and security. Instead of mere exchange, they see the need for conscious reflection on domination and an honest disclosure of perpetuating inequalities.

Thesis 12: Legal and unrestricted mobility both within and between the two continents is driving economic prosperity and cultural exchange.

	definitely possible	rather possible	rather not possible	definitely not possible
Possibility	16%	37%	33%	13%

	by 2025	by 2035	by 2045
Time horizon	16%	43%	41%

	fundamentally influential	quite influential	some influence on specific issues	little influence	no influence at all
Influence	44%	50%	5%	2%	

'Migration' and 'mobility' were the terms mentioned most often as key issues during the interview phase of this project – and views differed considerably. We see the same controversies and uncertainties in respondents' online assessment of this Delphi thesis. There is considerable disagreement about how possible this development was judged, with 'definitely
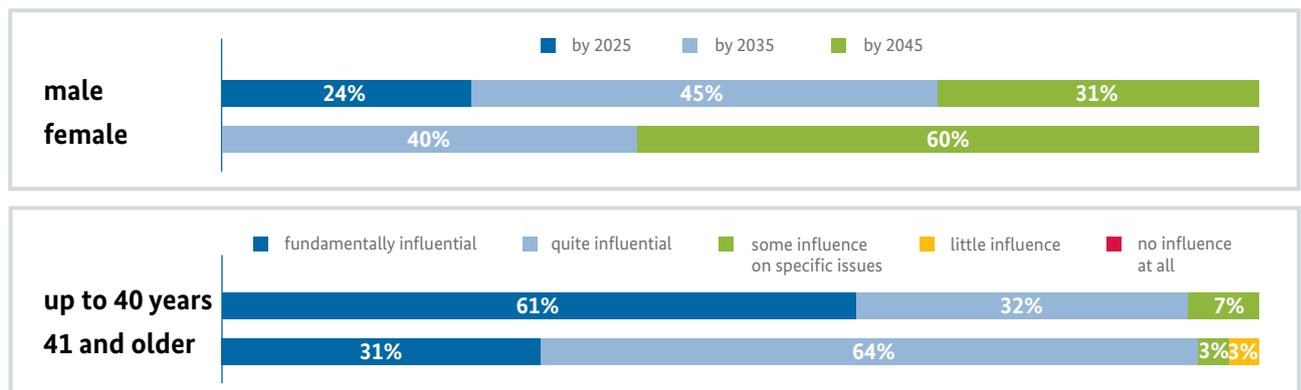
possible' and 'definitely not possible' being chosen almost equally often. The time horizon for realisation is seen as medium- to long-term, with many female experts in particular, seeing it as a long-term project.

Many experts assume that Europe will, in the long term, have to give in to its own economic needs and

"Intercontinental mobility is key to obtaining jobs and exploit market advantages. Thus, differing bargaining powers and economic strengths will tend to balance more equally between the continents, though local and regional disparities within countries and between the continents would remain to a certain extent."

open up pathways for legal migration (above all in the form of circular migration). There are arguments that migration was always a driver for prosperity and (cultural) exchange and that **'Africa and Europe could create the world's largest trading, cooperation and most prosperous bloc.'** Particular importance is also attributed to inner-African mobility. Given the political situation in Europe, however, many experts are very dubious about legal and unrestricted mobility between the continents being achieved within the next 20 years as, currently, **'politicisation and**

securitisation (...) seriously undermine (...) legal migration avenues, however needed they may be.' The first thing that would be needed to change this would be support for regular migration within Africa, granting of humanitarian visas and, eventually, a bilateral agreement between Schengen countries and the AU on visa waivers. The role of the European media in influencing public opinion and drawing a more balanced picture of migration is considered crucial to this development as **'many Europeans are frightened of free movement of people.'**

	by 2025	by 2035	by 2045
male	24%	45%	31%
female		40%	60%

	fundamentally influential	quite influential	some influence on specific issues	little influence	no influence at all
up to 40 years	61%		32%	7%	
41 and older	31%	64%		3%	3%

The influence of this development is considered high, with young respondents under 40 assessing it as significantly higher than the rest of the sample. Currently described as a **'toxic topic'** in African-European

relations, enhanced mobility could, in future, be a significant way of lending presence and visibility to African positions and deepening connections and understanding between the continents.

Thesis 13: In order to exploit the potential of divergent demographic developments in Africa and Europe, platforms – for example for job searches and academic exchange – are used widely.

Possibility			
definitely possible	rather possible	rather not possible	definitely not possible
48%	37%	15%	

Time horizon		
by 2025	by 2035	by 2045
50%	34%	16%

Influence				
fundamentally influential	quite influential	some influence on specific issues	little influence	no influence at all
35%	42%	18%	5%	
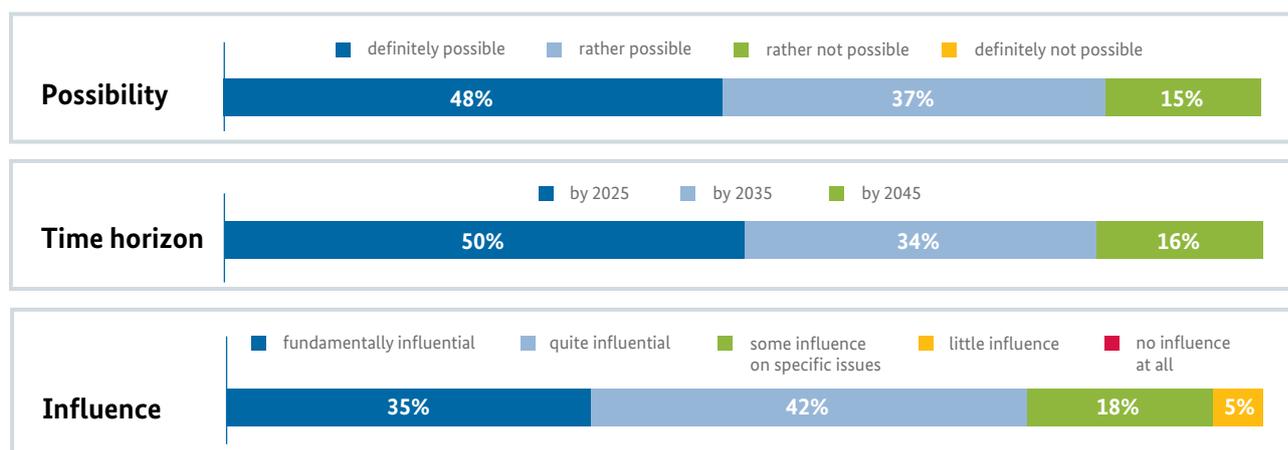
A vast majority believe the use of digital platforms to exploit the potential of divergent demographic developments in Africa and Europe is possible in the short to medium term, with half of them assessing this development to take place until 2025 already and no differences between the groups in their ratings. This is a 'just do it' thesis.
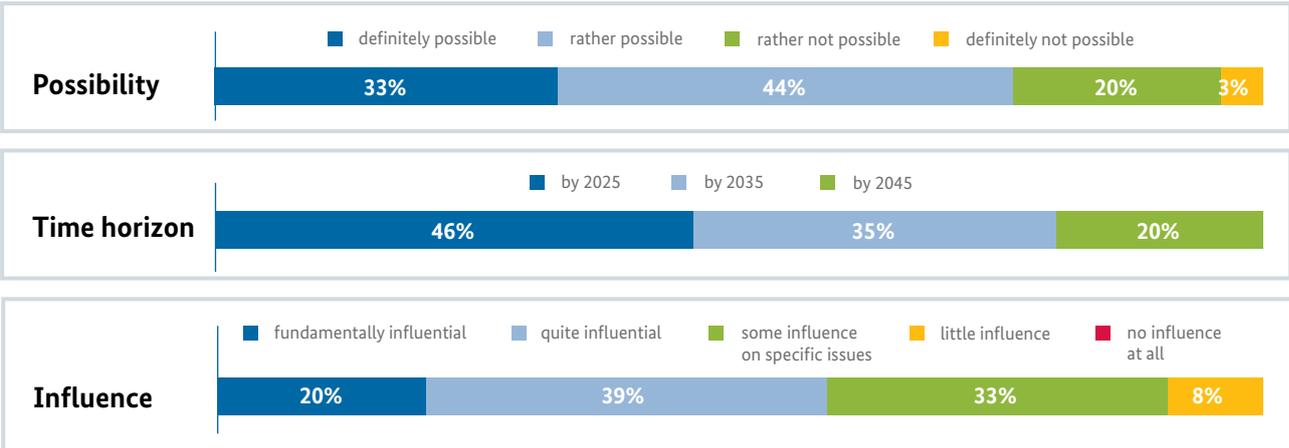
This positive assessment is particularly interesting, given its complementarity to thesis 12. This confidence can be attributed to a range of factors. First of all, several experts underline the economic pressure that is driving European decision-makers to open up certain areas of exchange, even in the face of political resistance. Both skilled and unskilled workers will be needed, given an ageing European population (for example, in agriculture and elderly and health care). The rollout of technology and wider internet access, along with the demands of a growing African middle class, will also foster such platforms. Some experts point out that such formats already exist, highlighting for example the ERASMUS+ pro-

gramme or Estonia's e-residency model as forerunners (though in the interviews, they also pointed out the problems of the latter, such as regulatory and tax issues).

To increase their potential, platforms should be adapted to the particular needs of the economy and take account on an ongoing basis of what is being sought and what is being offered. At the same time, a few experts warn of a 'brain drain' and highlight the need for better information infrastructure as a vital prerequisite. As an 'interim valve', such platforms could be instrumental in combatting illegal migration and easing some of the current tensions and frustrations. Moreover, with local ICT competencies emerging on both continents, professional exchange could also help challenge established monopolies of the sector. Nevertheless, as one expert makes it clear, platforms are regarded by many only a first step on the path towards more substantial exchange: **'A platform might meet individual needs but is unlikely to help the structural shift necessary to address the demographic changes on both continents.'**
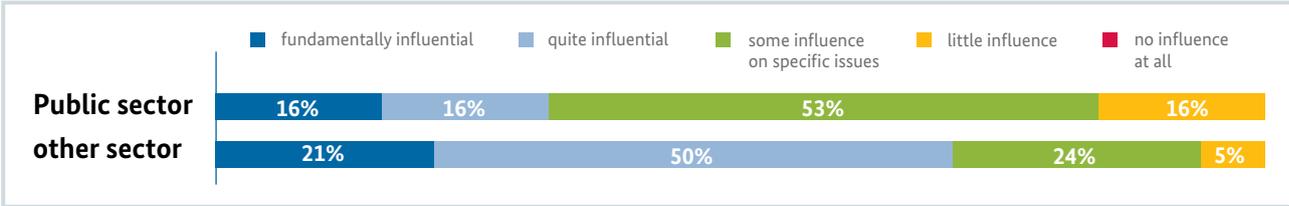
> "The uneven distribution of digital resources, infrastructures and capabilities as well as strong intellectual property regimes reduce the possibility of shared platforms."

Thesis 14: African-European relations are shaped by a plethora of non-state actors (such as philanthropy, religious leaders, NGOs, social movements, individuals). This has fundamentally changed traditional state-to-state relations.

Possibility	definitely possible	rather possible	rather not possible	definitely not possible
	33%	44%	20%	3%

Time horizon	by 2025	by 2035	by 2045
	46%	35%	20%

Influence	fundamentally influential	quite influential	some influence on specific issues	little influence	no influence at all
	20%	39%	33%	8%	

This is a very topical issue, and many respondents believe it can be achieved as early as 2025, with the vast majority seeing it as being achievable by 2035. It attracts a high possibility rating, as in many countries, the state is perceived as weak, and non-state actors assume some public roles. This thesis is estimated to have less influence than any other, although almost 60% of the participants see it as being 'fundamentally influential' or 'quite influential'. The public sector rates the influence as significantly below the average.

	fundamentally influential	quite influential	some influence on specific issues	little influence	no influence at all
Public sector	16%	16%	53%	16%	
other sector	21%	50%	24%	5%	

The likeliness of this development being achieved is attributed above all to political configurations in the African context: where state power is fragile, non-state actors already play a crucial role in many African countries today. Emphasis has been placed among other issues on religious leaders, who are often highly respected and trusted personalities. Another group of non-state actors seen to enjoy enormous influence in the African context are what one expert refers to as **'philanthro-capitalists.'** It is this group whose influence is not assessed as exclusively positive (by contrast with the consensus in the interviews). Although most experts agree that grassroots voices must be heard and that the inclusion of non-state actors might further contribute to establishing a relationship of real equality, they are also sceptical to a certain degree. Many respondents are worried about a significant accountability problem, in particular where non-state actors deliver basic services. They also point out that the more power states regain vis-à-vis non-state actors, the stronger the EU's and AU's respective positions are. Reduced contention from non-state actors could benefit power structures on both continents and lead to a more coherent voice within them and towards each other.

41

4.4 Cluster 4: Peace, security and democracy: adjusting concepts, strategies and institutions

4.4.1 What we learned from the expert interviews

The issue of peace and security was approached from two dimensions in the interviews. At a more conceptual level, many experts argued that Africans and Europeans lack a shared understanding of what security actually entails. While European engagement in the realm of security is characterized by a mixed approach combining soft and hard power, many interviewees identified a tendency towards a more narrow understanding of security that is epitomized by an increased focus on traditional interventions in the security sector, such as fostering border management or the capacity of the state. In contrast, several experts emphasized that **'the African understanding is that of 'hu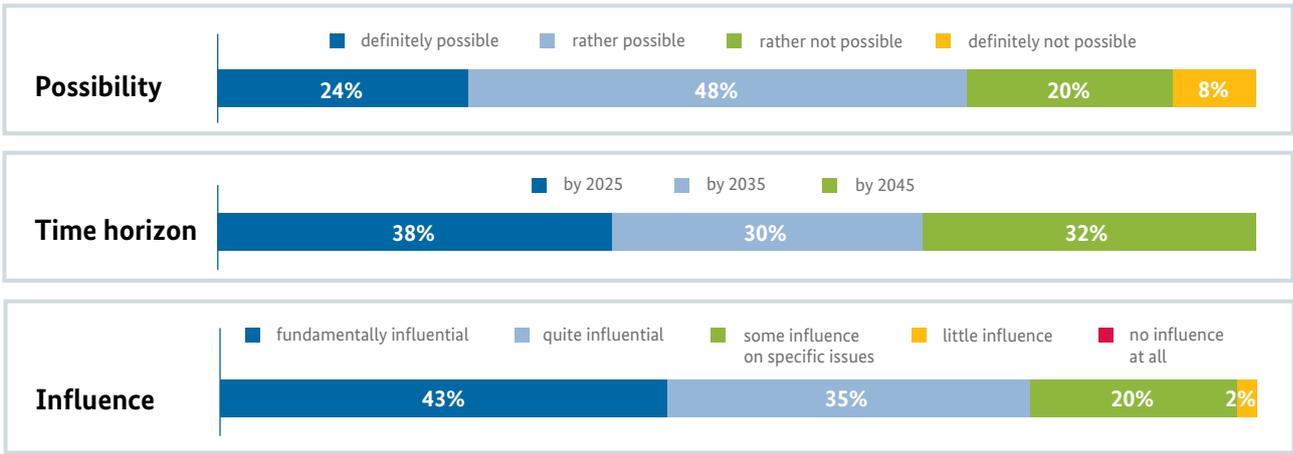man security'** – that is, a more holistic approach that encompasses seemingly unrelated issues such as **'trade across borders, environment and health.'** At institutional level, many experts see potential for cooperation in jointly reforming the African Security Architecture and in burden-sharing for peace operations, including in the multilateral arena. Geographically, most experts regard the destiny of the Sahel as a linchpin not only of regional stability but also of the development of migratory flows to Europe and Sub-Saharan Africa. In terms of democracy, some interviewees were concerned about growing anti-democratic tendencies, both in European and in African countries.

4.4.2 Assessment of theses: results of the Realtime Delphi survey

Within cluster 4, it is obvious that risks to security and democracy both in Europe and in Africa are an urgent challenge seen as achievable in a short time horizon: respondents rate three of the four theses (all of them 'negative' scenarios) as achievable in the short-term. The single 'positive' scenario in this cluster – the joint set-up of a new African Security Architecture – is regarded as possible, highly influential and desirable by many experts, but respondents are divided on the time horizon needed to achieve it, with around one third believing it can be achieved by each of the dates of 2025, 2035 and 2045.

Thesis 15: A new African Security Architecture is in place. It is the result of close African-European cooperation and characterised by a shared understanding of human security, an EU-inspired mix of hard and soft power instruments and a focus on conflict prevention.
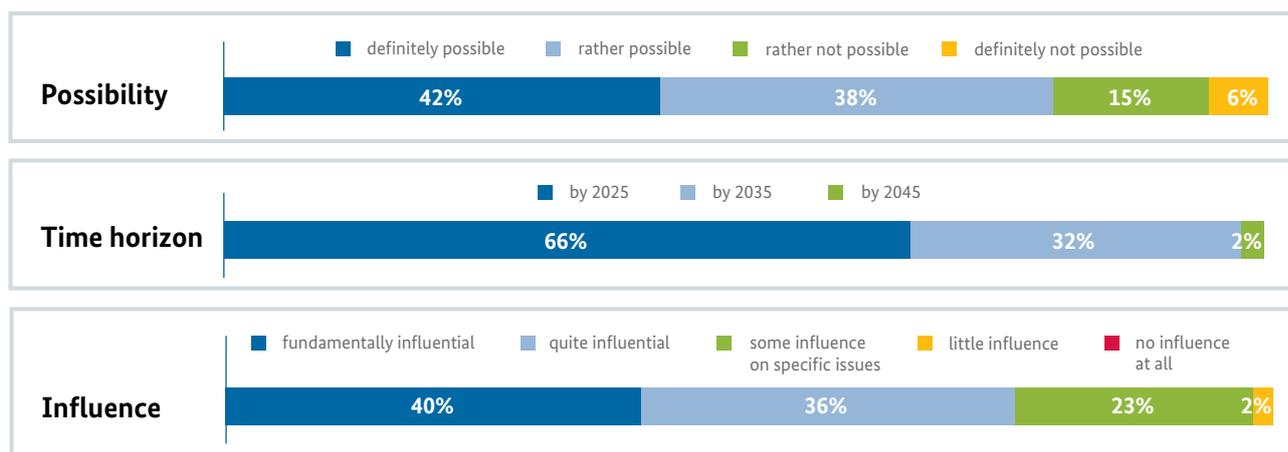
Possibility			
■ definitely possible	■ rather possible	■ rather not possible	■ definitely not possible
24%	48%	20%	8%

Time horizon		
■ by 2025	■ by 2035	■ by 2045
38%	30%	32%

Influence				
■ fundamentally influential	■ quite influential	■ some influence on specific issues	■ little influence	■ no influence at all
43%	35%	20%	2%	

Though a majority of experts assess the thesis on a new Security Architecture as 'definitely' or 'rather' possible, they appear to be highly divided on the time horizon needed for its realisation. However, it is regarded as an influential development, with almost 80 % rating it as 'fundamentally influential' or 'quite influential'.

The relatively high assessment regarding possibility is rooted above all in the political urgency associated with insecurity, migration and terrorism that could spill over from Africa; as a result, Europe is, in the opinion of many respondents, eager to cooperate substantially in this area. Moreover, Europe is not only seen to be particularly affected compared to other international players but is also considered to have a certain advantage because of its better understanding of the tribal, religious and internal working structures

of many African countries. By contrast, more sceptical participants point out that cooperation might be difficult because of the multitude of interests at stake, difficulties with implementation and the controversial role of certain EU member states. They therefore question whether taking the EU as a model would actually mean developing a shared understanding or would, in fact, be a one-sided imposition. Some also fear that the Covid-19 pandemic will distract European interest in this issue and prevent African states from coming together and further developing cooperation. Either way, many respondents believe that achieving this development will have a huge influence on global security, African ownership (for example through a changed division of labour in peacekeeping missions) and stabilisation of the basis for all other socioeconomic developments in Africa.

Thesis 16: Divergent assumptions between Europe and Africa about security challenges have led to the collapse of the security situation in key conflict settings such as the Sahel and the Horn of Africa.

	definitely possible	rather possible	rather not possible	definitely not possible
Possibility	42%	38%	15%	6%

	by 2025	by 2035	by 2045
Time horizon	66%	32%	2%

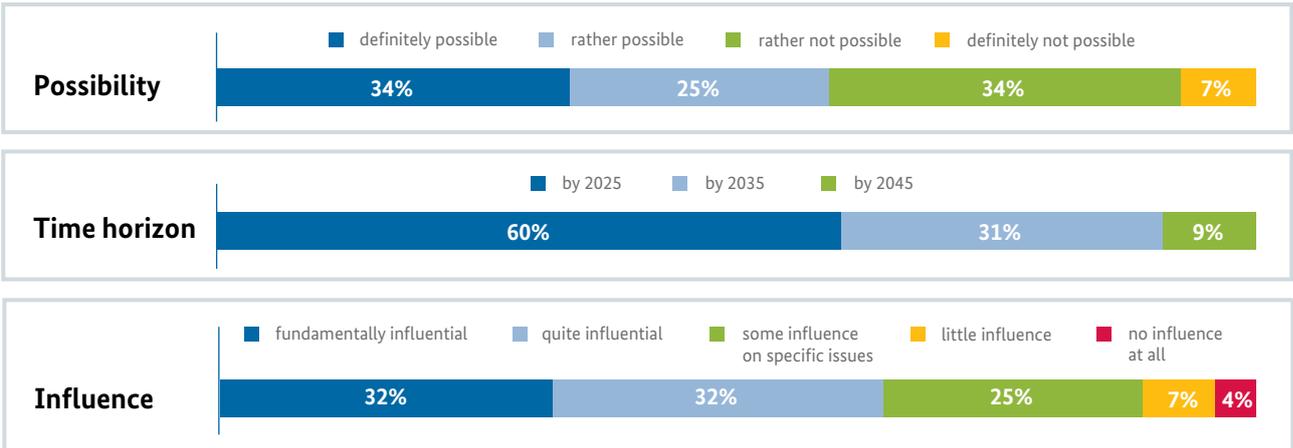|	fundamentally influential	quite influential	some influence on specific issues	little influence	no influence at all
Influence	40%	36%	23%	2%	

The collapse of the security situation in key conflict settings, such as the Sahel and the Horn of Africa, is a current topic that the vast majority of respondents believe is possible by 2025. Some see this collapse as imminent. If so, it will – according to the majority – be 'fundamentally influential' or 'quite influential'.

In particular, as regards the Sahel, several experts see a complete security breakdown as likely to happen for a number of reasons. First, Europe is criticised for being unwilling to provide the necessary funds to actually tackle the roots of violence, while African governments are accused of being unwilling to cooperate. Some experts also see a pattern of European militarisation of conflict contexts (unintentionally, starting their engagement with different intentions), thereby further inflaming what were formerly minor ethnic disagreements (in the Sahel, but also in the Horn of Africa and

Libya). This process is, according to some experts, often spearheaded by single EU member states.
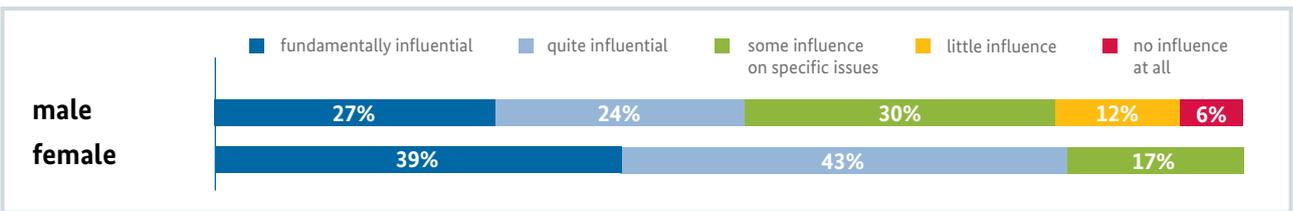
Much greater weight should be given in future security cooperation to African approaches to security that have previously not received sufficient attention, such as attempts to make use of the principles of Pan-Africanism and dialogue in conflict prevention. Some experts also see widespread inequality as a major risk factor that must be tackled to prevent future conflicts. Finally, the impact of climate change is widely expected to further aggravate the security situation in these security contexts. Many experts assess this development to affect future African-European relations in a multidimensional manner, by boosting terrorism and the number of Internally Displaced Persons (IDPs), undermining development prospects and negatively influencing other issues, such as African-European trade.

Thesis 17: Authoritarian regimes in Europe and totalitarian leaders in Africa have exploited the weakness of democracy and joined forces to champion their political agendas.

Possibility	definitely possible	rather possible	rather not possible	definitely not possible
	34%	25%	34%	7%

Time horizon	by 2025	by 2035	by 2045
	60%	31%	9%

Influence	fundamentally influential	quite influential	some influence on specific issues	little influence	no influence at all
	32%	32%	25%	7%	4%

There is broad agreement on the topicality of the issue but wide disagreement on how possible it will be to achieve. The influence it will have is not r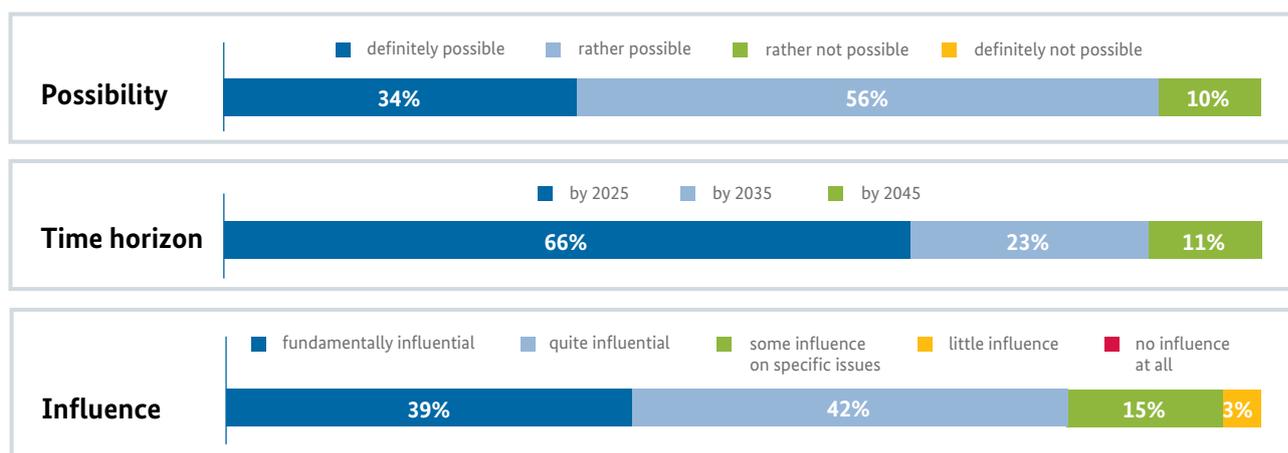ated as very high: women see a greater influence than men, although none of the participants ticked 'no influence at all' and some mention, for example the **'historical injustices of colonialism'** and the fear that the **'world could turn more totalitarian as a whole.'**

	fundamentally influential	quite influential	some influence on specific issues	little influence	no influence at all
male	27%	24%	30%	12%	6%
female	39%	43%	17%		

Some argue that such coalitions have happened before and point to other existing authoritarian alliances. A majority of commentators do, however, not see evidence that cooperation between authoritarian regimes would be possible or manifest a 'trend'. In the view of many experts, these regimes **'are not sustainable and cannot compete with successful democracies.'** Moreover, unlike in the past, societies today are more resilient. ICT, for example, offers people – and the younger generation in particular – the means to enjoy open access to knowledge and to mobilise. Coalition or not, many experts see a need to counter authoritarian influences. Particular importance is attached here to education, stereotype-free media and the maintenance of person-to-person contacts.

Thesis 18: Populism, xenophobia and nationalism have led to a dramatic deterioration in African-European relations.

Possibility

definitely possible	rather possible	rather not possible	definitely not possible

34%	56%	10%

Time horizon

by 2025	by 2035	by 2045

66%	23%	11%

Influence

fundamentally influential	quite influential	some influence on specific issues	little influence	no influence at all

39%	42%	15%	3%

This is the thesis that most experts expect to be possible by 2025. The majority of the Europeans see this as a current topic, in contrast to their African counterparts, who expect it to be achieved within a somewhat later time horizon. Many say that it is already happening now and fear that the issue is gaining in importance. Not only has discourse in Europe deteriorated, but within African countries, experiences of racism in Europe are having an increasingly negative influence on public opinion. At political level, mistrust of European intentions and agendas has grown, and Europeans are increasingly perceived to have a **'utilitarian view of aid'** that is deliberately designed to keep Africans out of Europe. Europe's migration policy, its short-term decision-making governed by electoral cycles and slow economic growth are all expected to further contribute to inward-looking attitudes within the EU.

4.5 Cluster 5: A world at risk: tackling global challenges through innovation

4.5.1 What we learned from the expert interviews

There is broad consensus among the experts interviewed that **Africa's innovation potential** is huge and spans issues ranging from digitalisation and climate change to pandemics, to name but a few issues.

Digitalisation is widely regarded as an opportunity, although some experts expressed uncertainty over the exact development path Africa should take and the risks that might accompany it: should the continent further rely on leapfrogging, as has already been successfully demonstrated in the field of ICT? Or does it still need to catch up in industrial terms? This ambiguity was discussed in particular with a view to the positive and negative impact that automation could have on the African job market.

The issue of **climate change** was dominated by the differences that several interviewees identified between Europe's efforts to mitigate it and Africa's to adapt to it. These differing priorities will have to be aligned in future African-European relations. Moreover, while some experts highlighted conflicting potential since Africa might be **'vulnerable to climate change, but (...) not the cause of it'**, interviewees were generally optimistic about a window of opportunity for cooperation, for example as regards technology transfer from Europe to Africa and the lessons of the European Green Deal, which many experts

acknowledged as valuable **'support to Africa to leapfrog into green economy with opportunities for jobs and a better quality of life.'** Moreover, deteriorating climatic circumstances were often mentioned in relation with its effects on peace and security on the African continent.

Most experts see considerable potential for Africa's **green energy production** (solar, wind and biomass), that **'could have a positive influence on [the] African-European relationship.'** In the future, Africa could not only harness the continent's natural abundance for its own use but also increasingly export energy. This could, in turn, further **'transform the relationship more into an equal one, on eye level, by Africa providing an important trading product.'**
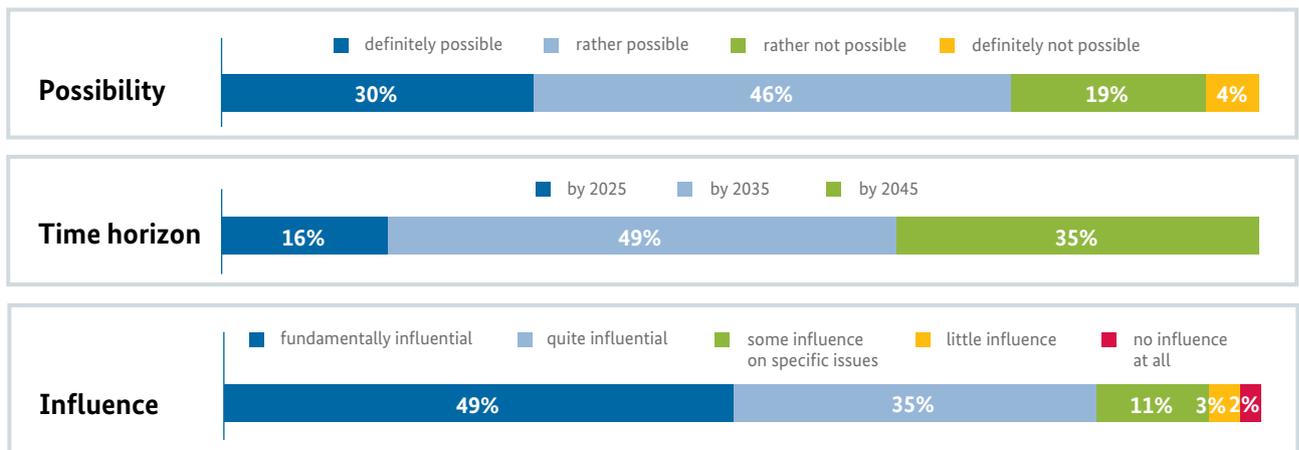
Because of the timing of the interviews, in February and March 2020, interviewees also mentioned **new pandemics,** especially as the threat of Covid-19 approached Europe and Africa. In this regard, many experts saw African health systems in particular as being unprepared and emphasised the growing importance of the issue, since further epidemics are expected, especially in Africa. Societal divisions, fake news and xenophobia were identified as threats accompanying the spread of the virus, and several interviewees argued that **'pandemic response should [be] a priority.'**

4.5.2 Assessment of theses: results of the Realtime Delphi survey

In cluster 5, there was unanimity over cooperation on global challenges, which a majority of experts see as highly influential for future African-European relations. Moreover, many experts believe that cooperation in this area is possible in the medium term or at least in the long term. In particular, the Green New Deal was highlighted as providing impetus for change. Since they are considered as 'apolitical' and solution-oriented, the issues of climate change, green transition and global health could be ideal bases for cooperation that might even spill over into more politically loaded or sensitive issues. It is worth mentioning that cooperation in the context of climate change and in the framework of a green transition for Africa are the two theses considered most desirable in the entire survey. However, to realise these visions, most of the experts see a need for political will and capacities, in particular through investment in infrastructure.

Thesis 19: Africa has successfully used its technological and digital potential to develop solutions for pressing global challenges (e.g. smart cities, urban agriculture, pandemic response, e-health). The continent exports its innovations to Europe and the world.

Possibility

definitely possible	rather possible	rather not possible	definitely not possible
30%	46%	19%	4%

Time horizon

by 2025	by 2035	by 2045
16%	49%	35%

Influence

| fundamentally influential	quite influential	some influence on specific issues	little influence	no influence at all
49%	35%	11%	3%	2%

This thesis is rated as extremely influential, with African participants rating influence even higher than European participants. Three quarters of the participants rate it as 'definitely possible' or 'rather possible'. However, the realisation is expected to take place at a very late stage in time. Many experts emphasised the entrepreneurial spirit of Africa's young people and underline the uniqueness of the continent's challenges, which might produce novel solutions, particularly in niche sectors. However, the current lack of infrastructure and investment is the 'elephant in the room'. There are plenty of ideas, but regional powerhouses and external actors are considered indispensable to scale up solutions. As one participant put it, **'Let's talk reality. The small islands of start-ups depend heavily on external funding. There is no innovative environment that could provide this kind of development at a larger scale.'** While a lack of infrastructure is seen as an obstacle particularly in sub-Saharan Africa, it is the supply side in North Africa that is an impediment, given the lack of democratic freedom necessary to experiment with new ideas. Moreover, some participants point out that – at least in the time frame envisaged by the study – African-European relations will be determined instead by macro-trends, such as migration, civil war and terrorism. At least some experts do not,

therefore, expect innovation to be ground-breaking enough to influence **'these more fundamental determinants of the relationship.'** By 2045, realisation of the innovations mentioned in the survey might be only incremental. However, when they are achieved, they are expected fundamentally to alter African-European relations. They would not only – eventually – lead to the **'Africa we want'**, as envisioned by the Agenda 2063, but also positively affect power asymmetries: in particular in the area of digitalisation,

Europe has largely been an importer rather than a provider of future technologies. Some also see a window of opportunity created by the Covid-19 pandemic. As a result of '[Covid-19] **stripping the veneer of neoliberal capitalism (...) people must now confront endogenous socio-economic development that is ecologically sound and within planetary boundaries.'** The pandemic might therefore have contributed to the realisation that **'an innovation initiative may prove to be the only solution for the continent.'**
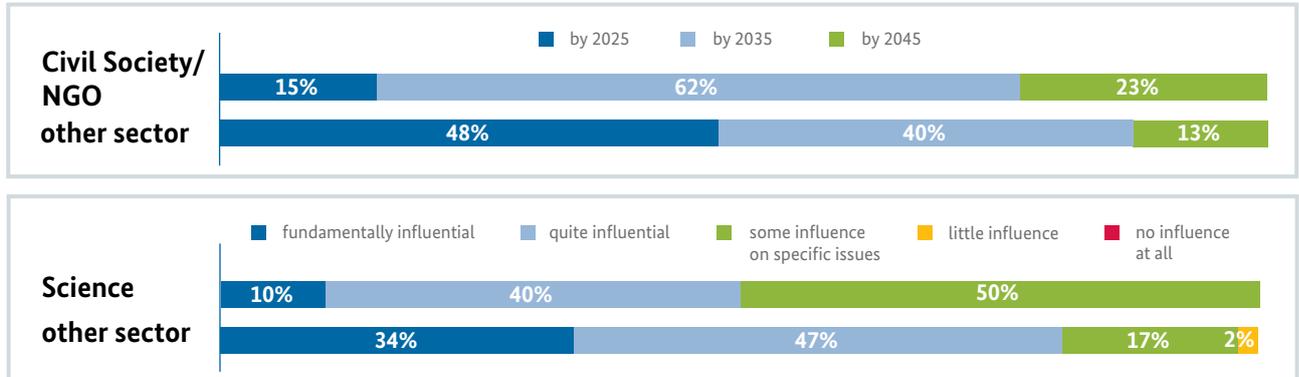
Thesis 20: Climate change created momentum for cooperation. Africa and Europe were able to align their policy response in the face of a common challenge.
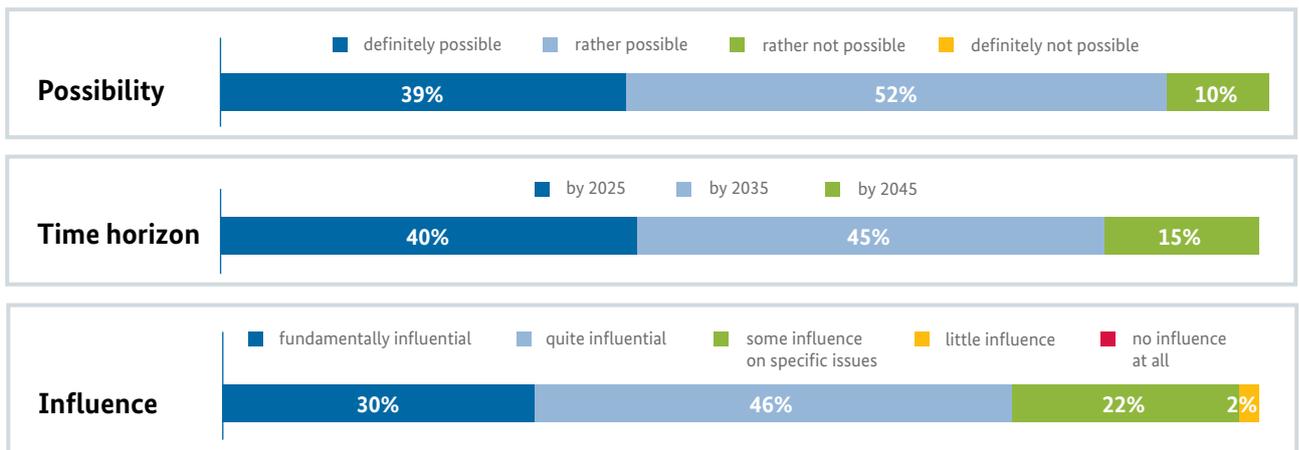
If this momentum is to be used to find solutions to a common challenge like climate change, this will be extremely influential, although interestingly, this thesis received lower ratings from academics. The time

horizon for realisation is, however, estimated to be longer-term, with civil society and NGOs being even more pessimistic than other groups.

❝We need to save the planet as we can see now: we are all locked down, and this shows us that we are all under one roof. If a world disaster happens, it won't see how much money you have and how much resources or knowledge you have.❞

Civil Society/ NGO other sector

	by 2025	by 2035	by 2045
	15%	62%	23%
	48%	40%	13%

Science other sector

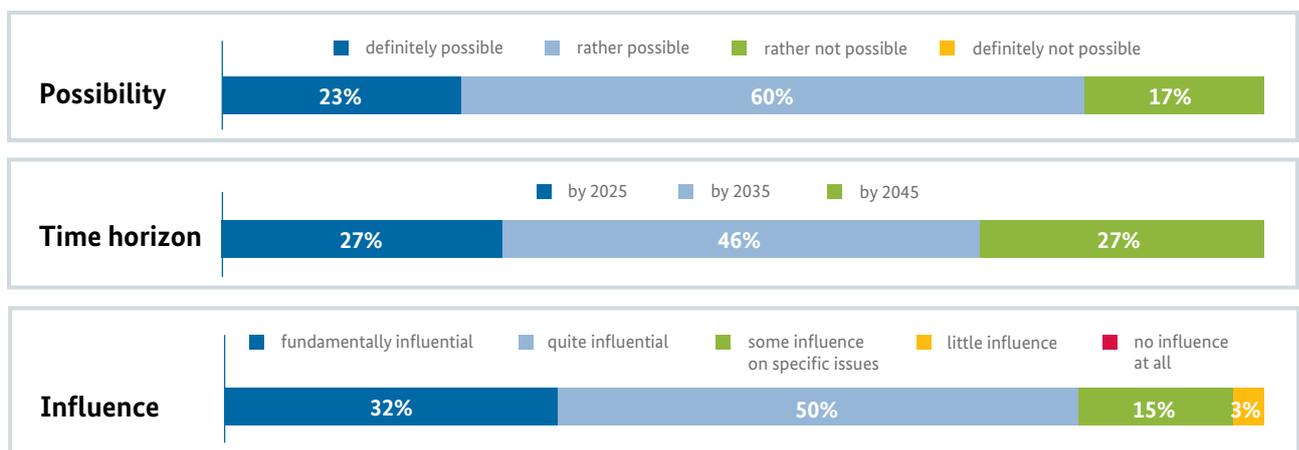|	fundamentally influential	quite influential	some influence on specific issues	little influence	no influence at all
	10%	40%	50%		
	34%	47%	17%	2%	

While most experts regard cooperation to combat climate change as possible, they assume it will be a medium-term project. As an existential threat, this might be the single most important rallying cry for cross-border cooperation. There are already promising practices with regard to European assistance in this field, though some experts point out that the diversity of African countries is sometimes a constraint on successful implementation and that **'adequate incentives for the diverse African populations** [not the elites] **to live, consume and do business sustainably and still deliver into the Western capitalistic system'** are not yet in place.

Although adaptation will be more important in the African context, mitigation efforts could be fostered as well, in particular in the area of sustainable energy production. Nevertheless, there is some controversy over the willingness of political actors to align their objectives on a cross-sectoral basis and secure a general acceptance of trade-offs. Some experts also point to the difficulty of prioritising this issue over other essential development efforts, for example in the area of peace and security or with a view to income generation. Yet many experts are convinced about the extremely high influence that cooperation on climate change could have as a catalyst for building trust and believe that with its multidimensional character, it could affect other issues in the long run. For this to happen, concrete action is needed – as, for example, envisioned in the European Green Deal – and continental African leadership should lead the way forward.

Thesis 21: The external dimension of Europe's Green Deal has provided strong impetus for a radical green transition and energy access for all in Africa.
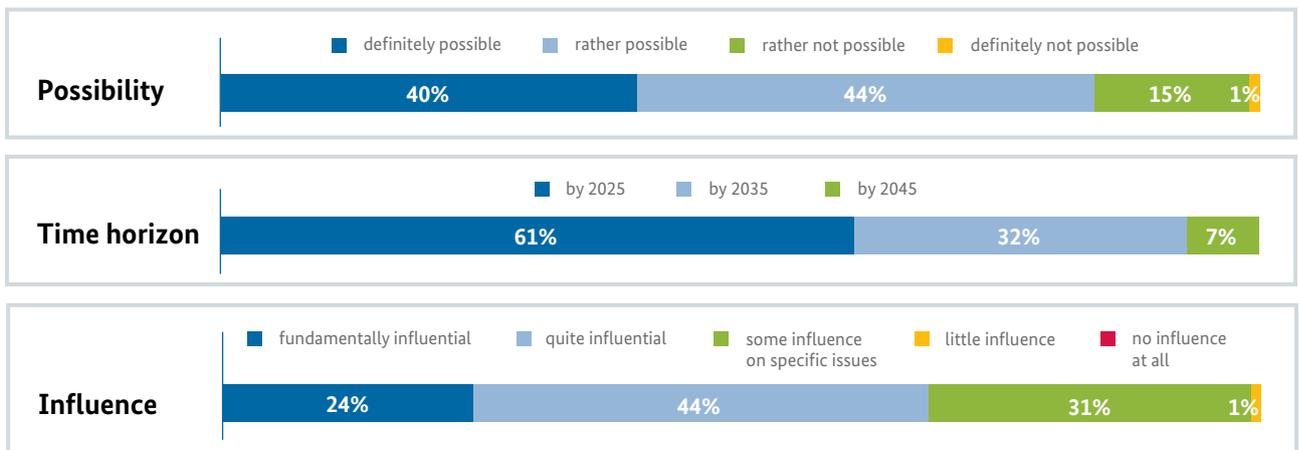
Possibility

	definitely possible	rather possible	rather not possible	definitely not possible
	23%	60%	17%	

Time horizon

	by 2025	by 2035	by 2045
	27%	46%	27%

Influence

	fundamentally influential	quite influential	some influence on specific issues	little influence	no influence at all
	32%	50%	15%	3%	

"If the world wants to survive, it needs the breath from Africa."

Together with the thesis on climate change, the thesis regarding a radical green transition received the highest ratings for 'desirability'. The 'possibility' ratings are also very high, with a time horizon of 2035. With Africa's vast and hitherto untapped energy resources (including solar and wind power), green energy could represent a new area for cooperation and enormous scope for technology transfer from Europe to Africa. Not only do many experts regard cooperation on this matter as an opportunity to **'reset Africa-EU relations'** and as a possible means of increasing pressure to combat climate change even at global level, they also identify its crosscutting significance. By fundamentally affecting social trends towards more sustainable pathways (for example, through cleaner investment, job creation and t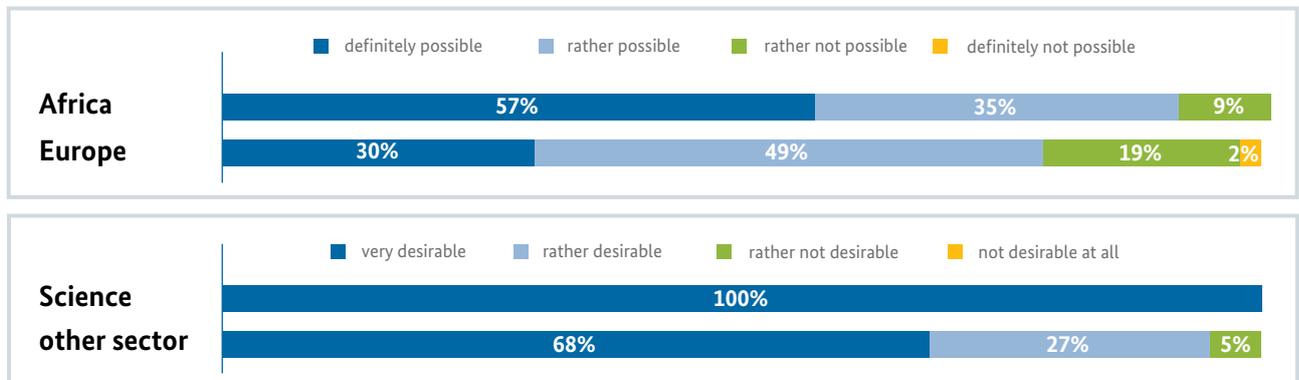he circular economy), they promise a long-lasting positive impact on African-European relations. Furthermore, decreasing dependence on oil exports could positively influence rent seeking behaviour of kleptocratic elites and could therefore constitute a window of opportunity for more inclusive and democratic societies in Africa and for more equitable terms of trade with Europe. However, a few experts also note that, if the EU is to export a green transition credibly, it must first make progress with internal reforms. Europe is not the only source of green technology, and probably not the most important source, so it must step up its efforts. Several respondents also emphasise the importance of investment in infrastructure and a strong political will. African-European cooperation towards a green transition might provide powerful impetus, but global alliance will be needed for a fundamental change of direction.

Thesis 22: As an issue of crosscutting importance for both continents, joint African-European pandemic forecasting and response strategies are in place.

	definitely possible	rather possible	rather not possible	definitely not possible
Possibility	40%	44%	15%	1%

	by 2025	by 2035	by 2045
Time horizon	61%	32%	7%

	fundamentally influential	quite influential	some influence on specific issues	little influence	no influence at all
Influence	24%	44%	31%	1%	

Although this thesis is considered slightly less influential than the preceding one, global health is rated as being a highly possible area for increased future cooperation, particularly by African experts. It is, however, important to bear in mind the scope for bias in experts' responses, given the urgency of the circumstances under which the Delphi survey was performed (during the lockdown imposed in response to the Covid-19 pandemics).

51

	definitely possible	rather possible	rather not possible	definitely not possible
Africa	57%	35%	9%	
Europe	30%	49%	19%	2%

	very desirable	rather desirable	rather not desirable	not desirable at all
Science	100%			
other sector	68%	27%	5%	

Comments indicate that the **'coronavirus highlights how important it is to collaborate in these matters'** and presume that the **'shock from 2020 is enough of an impetus.'** The desirability of joint forecasts and response is remarkable: all participants from academia regard this joint endeavour as 'very desirable', while others rate it only slightly lower, as 'rather desirable'.

As an apolitical, yet interconnected issue that requires concerted action, and that citizens probably demand even more in the wake of the Covid-19 pandemic, closer cooperation in the field of public health is seen as a likely field of cooperation between the continents. Mutual learning (in particular with a view to some quite successful African best practice during the current pandemic), the requirement for strategic planning and intelligence sharing, and the impact of global health on other key areas such as trade and political relations could all contribute to genuinely deeper and mutually beneficial cooperation between the two continents. Nevertheless, some experts also stress the urgency for global cooperation on this matter.

"The generosity of the support from the European side for handling the crisis in Africa will be pivotal for the future of the relationship. Europe has been through the first wave of the pandemic ahead of Africa and can share experience, learning and equipment as well as financial support for African states who are hard hit. A recognition that Covid has to be fought everywhere will be a critical investment not only in fighting the pandemic, but also in the relationship. This decision is currently hanging in the balance."

4.6 Changes in relations following the Covid-19 pandemic

In response to the current global situation, a final question was added to the survey, asking participants for their assessment of the impact of the Covid-19 pandemic on African-European relations. Many responses suggest that the pandemic could create momentum for a recalibration of African-European relations. Though many participants argue that the health crisis might provide new impetus for international and African-European cooperation, they see the possibility for both positive and negative impacts of the crisis on a range of issues.

Many respondents are critical, arguing that Europe is currently too preoccupied with 'internal crisis management' to find a coordinated European solution. Europe, they argue, should not forget 'to support Africa in handling the situation', since it 'could also serve as a foundation for future platforms on pandemic prevention and preparedness.' For example, while the 'risk of a health system crisis' is particularly dramatic for African countries, given the lack of functioning health systems, some respondents highlight African experiences with past epidemics (e. g. Ebola), from which Europe could learn a lot. Many participants therefore describe the current crisis as an opportunity to join forces to prepare for new but as yet unknown external threats.

However, several respondents warn that **social fragmentation** within countries might deepen and that a reorientation towards domestic issues and politics might take place, both in Africa and in Europe. The situation could both reduce African trust in European solidarity and feed a lack of European interest in Africa. Many participants also fear over-investment in public sector capacity and rising debt levels might result in inadequate spending on external affairs in Africa, for example.

One of the major issues discussed is **migration:** some respondents expect a 'more restrictive approach to accept refugees in Europe', while others fear that the reduction or even bans on travelling between Africa and Europe may become one major complicating factor in the relations between both continents in the long run.

The impact on the **economy** is widely expected to be negative, including 'impacts on tourism, oil exports, [or] trade flows with China and the EU.' There may be a 'drop in internal demand and intra-African trade due to confinement measures.'

Another risk refers to the potential for **food crises** in vulnerable regions where lockdown disrupts supply chains and prevents people from going to work, specifically in the agricultural sector.

Some expect that **China** may emerge from the situation as the economic winner, as it has reacted speedily in delivering the products needed.

Finally, at a more practical level, the lack of face-to-face interaction and travel restrictions will make it more difficult to deepen the relationship between Africa and Europe. Some experts therefore believe it is more important than ever to invest in **digital and virtual exchange.**

5 Outlook

The opportunities experts see in a deeper and more comprehensive partnership between Africa and Europe are wide-ranging. By joining visions, resources and expertise, the two continents could not only transform their relations vis-à-vis each other but also pioneer solutions for pressing global challenges and provide important impetus to shape the future and make international cooperation more sustainable and mutually beneficial. Some important steps in this direction have already been taken, but others still need more attention and greater effort on both sides.

So far, the post-Cotonou negotiations have shown that it remains a challenge to tackle some of the key issues cited by the experts, such as agreeing on a common and coherent mutual position, strengthening institutions (particularly the AU), and finding mutually beneficial solutions for politically fraught issues including migration and conditionality.

On the other hand, the continents are already aware of the more feasible policy areas in which intensified cooperation could lead to more direct and tangible outcomes. The EU-AU Memorandum of Understanding on Peace, Security and Governance and engagement through the African Peace Facility are one example. Another is the focus on joint action on the impact of climate change or in the area of digital transformation, as set out in the European Commission strategy paper in March 2020.

This strategy paper is, however, also proof of the uncertainties that accompany policy-making in a globalised world. Even without a single mention of the word 'pandemic', the paper will most likely predict some major changes in response to current events. The Covid-19 pandemic has certainly had an unexpected impact, turning day-to-day policy-making upside down. It could, however, also be a major opportunity. As with the other risks on which we have shed light in this study – climate change, a weak multilateral system, and security challenges – there is strong impetus to tackle global challenges together. In a world in which the cost of major threats is borne by everyone, such a joint approach is more urgent than ever. With future relations between Africa and Europe high on the agenda, the German EU Council Presidency and this year's AU-EU Summit represent excellent opportunities to make a fresh start.

6 Annexes

6.1 List of experts interviewed

Title	First name	Last name	Position	Institution	Country
Dr	Temi	**Abimbola**	Lead Advisor to the Senior VP	African Development Bank	Ghana/ Côte d'Ivoire
	Levinia	**Addae-Mensah**	Deputy Executive Director	West Africa Network for Peacebuilding (WANEP)	Ghana
	Faten	**Aggad**	Senior Advisor to the AU High Representative on EU-AU Negotiations	African Union (AU)	Algeria/ Ethiopia
Dr	K. Y.	**Amoako**	President and Founder	African Center for Economic Transformation (ACET)	Ghana
Dr	Kojo	**Asante**	Director of Advocacy and Policy Engagement	Ghana Center for Democratic Development (CDD)	Ghana
	Alexander	**Baum**	Senior Advisor to the Deputy Secretary General ACP and Post-Cotonou Negotiations	European External Action Service (EEAS)	Germany/ Belgium
Dr	Zsuzsánna	**Biedermann**	Research Fellow	Institute of World Economics, Center for Economic and regional Studies (CERS)	Hungary
Dr	Annamarie	**Bindenagel-Šehović**	Honorary Research Fellow	University of Warwick (UK)	Germany/UK
Dr	Morten	**Bøås**	Research Professor	Norwegian Institute on International Affairs (NUPI)	Norway
Dr	Oriol Puig	**Cepero**	Researcher	Barcelona Centre for International Affairs	Spain
Dr	Stefan	**Cibian**	Executive Director	Făgăraș Research Institute	Romania
Dr	Brahima S.	**Coulibaly**	Director	Africa Growth Initiative, Brookings Institution	USA
	Jędrzej	**Czerep**	Analyst, Middle East and Africa Programme	Polish Institute of International Affairs	Poland
	Susi	**Dennison**	Director of European Power Programme	European Council on Foreign Relations (ECFR)	UK
Dr	Francesca	**Di Mauro**	Head of Unit Central Africa	DG International Cooperation and Development, European Commission	Italy/Belgium
Dr	Lars	**Engberg-Pedersen**	Senior Researcher	Danish Institute for International Studies	Denmark
Dr	Comfort	**Ero**	Programme Director Africa	International Crisis Group	Kenya
	Folabi	**Esan**	Partner	Adlevo Capital	Nigeria
	Obiageli	**Ezekwesili**	Senior Economic Advisor	Africa Economic Development Policy Initiative (AEDPI)	Nigeria

Title	First name	Last name	Position	Institution	Country
	Gibril	**Faal**	Visiting Professor in Practice	Institute of Global Affairs, London School of Economics (LSE)	Gambia/UK
Dr	Giovanni	**Faleg**	Senior Analyst	European Union Institute for Security Studies (EUISS)	Italy/Belgium
	Mikaela	**Gavas**	Co-Director Development Cooperation in Europe Programme	Center for Global Development (CGD)	UK
Msgr. Prof.	Obiora Francis	**Ike**	Professor of Ethics and Intercultural studies	Godfrey Okoye University	Nigeria
	Amy	**Jadesimi**	CEO	Lagos Deep Offshore Logistics (LADOL)	Nigeria
Dr	Nisreen	**Lahham**	Founder	Future Studies Forum	Egypt
Dr	Acha	**Leke**	Chairman Africa	McKinsey & Company	Cameroon
Dr	Ibrahim Hassane	**Mayaki**	CEO	New Partnership for Africa's Development (NEPAD), African Union (AU)	Niger/South Africa
Dr	Ahmadou Aly	**Mbaye**	Senior Fellow	Africa Growth Initiative, Brookings Institution	Senegal/USA
Dr	Stephan	**Mergenthaler**	Head of Strategic Intelligence	World Economic Forum (WEF)	Germany/Switzerland
	Nuria	**Molina**	Head of Europe Office	Bill and Melinda Gates Foundation	Spain/UK
	André	**Oberholzer**	Group Head Corporate Affairs	Sappi Limited	South Africa
	Angela	**Odai**	Programme Officer-Europe	Citizens & Diaspora Directorate (CIDO), African Union (AU)	Ethiopia/Ghana
	Christoph	**Rauh**	Director Africa Policy	Federal Ministry for Economic Cooperation and Development (BMZ)	Germany
Dr	Stefan	**Schepers**	Secretary General	High Level Group on Policy Innovation	Germany/Belgium
	James	**Shikwati**	Director	Inter Region Economic Network (IREN)	Kenya
	Elizabeth	**Sidiropoulos**	Chief Executive	South African Institute of International Affairs (SAIIA)	South Africa
Dr	Vera	**Songwe**	Executive Secretary	UN Economic Commission for Africa	Cameroon
Dr	Albert	**Zeufack**	Chief Economist Africa	World Bank	Cameroon/USA

6.2 Demographic data of Realtime Delphi survey participants
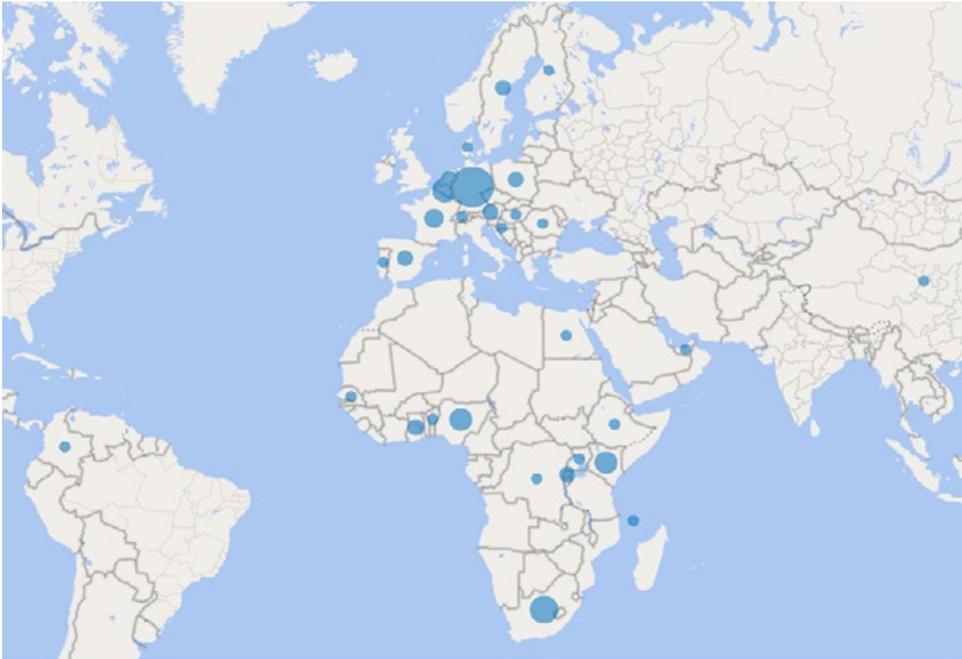
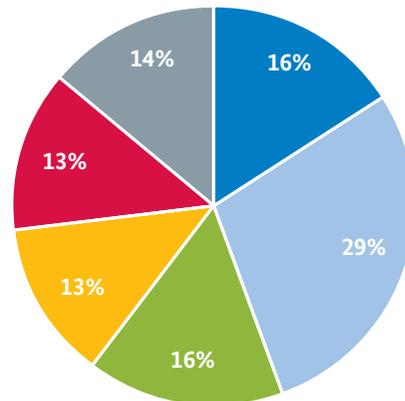Europe:
18 countries
n=60 (9 origin
in Africa)

Africa:
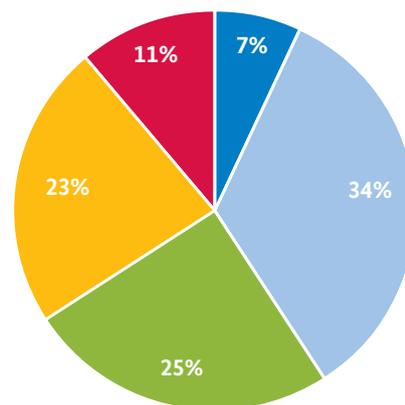15 countries
n=30 (1 origin
in Europe)
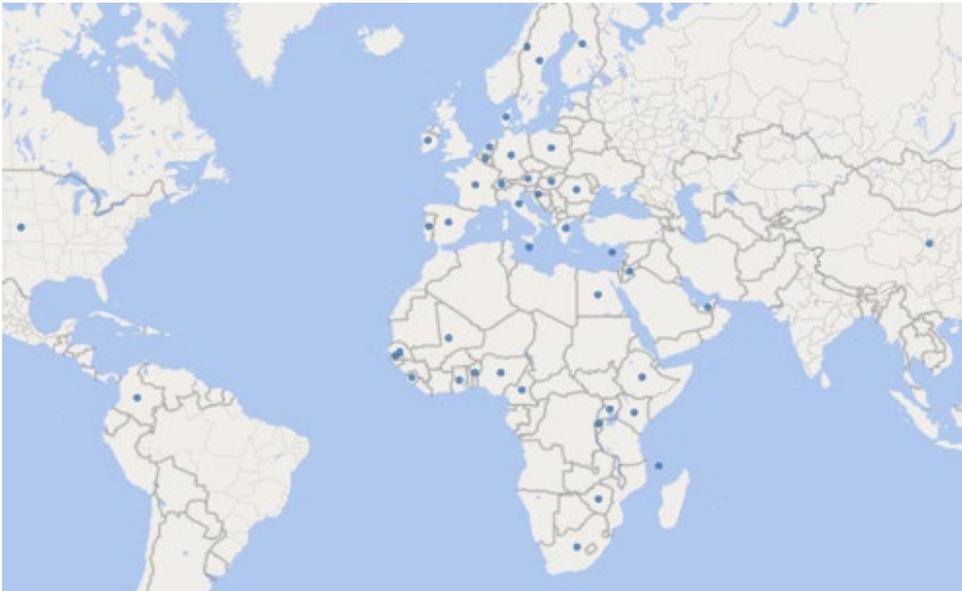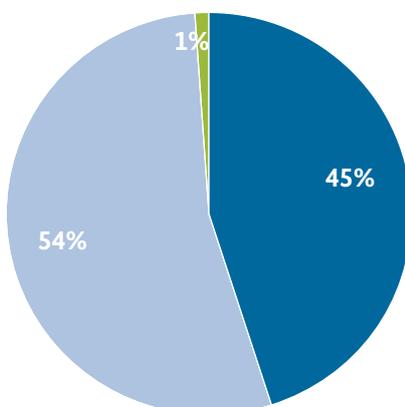
45 countries
(residency or
origin)

Sector

- Science — 16%
- Public sector — 29%
- Civil society — 16%
- NGO — 13%
- Private sector — 13%
- other — 14%

Age

- 21 to 30 years — 7%
- 31 to 40 years — 34%
- 41 to 50 years — 25%
- 51 to 60 years — 23%
- 61 to 70 years — 11%

Sex

- female — 45%
- male — 54%
- other — 1%

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Imprint