China's economic presence in Mozambique

Presença econômica da China em Moçambique

Presencia económica de China en Mozambique

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Abstract

Our study aims to analyse the Chinese economic presence in Mozambique during the second decade of the 21st century. This objective emerged from the observation of the visible presence in Mozambique of several Chinese companies that intervene in different sectors. The choice of this period of analysis is mostly related with the lack of systematized studies about this topic, taking also into consideration that, during this period, Mozambique faced an economic and financial crisis that resulted from a high debt and that led to the intervention of the international community. In order to achieve this goal, a central question arises: what are the characteristics of the Chinese economic presence in Mozambique during the second decade of the 21st century? The first part, the framework, briefly describes the Chinese presence in the African continent; in the second part, we will address the relationship between Mozambique and China and will describe spectrally the economic and financial situation in Mozambique; in the third we attempt to estimate the volume of trade between both countries; in the fourth, we analyse China-Mozambique cooperation and China's Official Development Assistance to Mozambique, and; in the fifth, we analyse China's current foreign direct investment in the country.

Keywords: China. Africa. Mozambique. Trade Relations. Cooperation. Foreign Direct Investment.

Resumo

O nosso estudo procura identificar uma caracterização para presença económica chinesa em Moçambique na segunda década do século. Assim, organizámos a nossa análise em cinco pontos fundamentais. No primeiro, efetuamos uma breve descrição da presença chinesa no continente africano; no segundo abordamos as relações entre Moçambique e a China e descrevemos a situação económica e financeira de Moçambique; em terceiro lugar procuramos quantificar as relações comerciais entre os dois países e, num quarto ponto analisamos a cooperação e a ajuda pública para o desenvolvimento efetuada pela China em Moçambique, para, num quinto ponto analisarmos qual o atual investimento direto efetuado pela China naquele país africano.

Palavras-chave: China em África. Moçambique. Relações comerciais. Ajuda Pública ao Desenvolvimento. Investimento Direto Estrangeiro.

Resumen

Nuestro estudio busca identificar una caracterización de la presencia económica china en Mozambique en la segunda década del siglo. Por lo tanto, organizamos nuestro análisis en cinco puntos fundamentales. En el primero, proporcionamos una breve descripción de la presencia china en el continente africano; en el segundo, abordamos las relaciones entre Mozambique y China y describimos la situación económica y financiera de Mozambique; en tercer lugar, buscamos cuantificar las relaciones comerciales entre los dos países y, en el cuarto punto, analizamos la cooperación y la ayuda pública para el desarrollo llevada a cabo por China en Mozambique, de modo que, en un quinto punto, analicemos la inversión directa actual realizada por China en ese país africano.

Palabras-clave: China en África. Mozambique, Relaciones comerciales. Asistencia pública para el desarrollo. Inversión extranjera directa

Introduction

China is now the second largest economy in the world and it projects considerable power--including economic, military, diplomatic, technological, and sharp power--on a global scale. China's rise is causing substantial shifts in the international order, largely in illiberal and non-democratic directions. Analysis of the nature and implications of China's increasingly assertive activities on the global stage is now one of the most significant contemporary topics for the study of International Relations.

The goal of this study is to identify and analyse China's economic and financial presence in Mozambique, with special focus on the second decade of the 21st century. We chose this topic due to the visible increase in the number of firms operating in Mozambique in several sectors, and to the unusual and interesting presence of Chinese personnel in cooperation projects funded by the Chinese state. We chose this specific period because of the scarcity of data and lack of systematic studies on the topic, but also because during this period, Mozambique has had to deal once again with political and security instability, a debt-driven economic expansion and a financial crisis that required intervention from the international community.

This paper offers a rigorous, empirically-grounded case study of China's involvement in Mozambique. But the relevance of the study is not limited to Mozambique alone. By a careful analysis of the case of Mozambique, the larger aim is to contribute to our understanding of China's growing presence and influence on the continent of Africa, more broadly.

While there are many academic studies on Chinese-African relations[2], and although generic data on the economies of African countries is available from accessible and credible sources, studies on Mozambique and specifically on the Chinese involvement in the country are scarce. A thorough review of the literature revealed little documentation in Portuguese and English, and what little does exist is scattered across different sources, such as the World Bank (2018), United Nations Conference

2. There is now a range of authors: Alden (2006); Jiang (2009); Mohan (2013); Besada and O´Bright (2017).

on Trade and Development (UNCTAD, 2018), the Statistical Yearbook of Mozambique (INE, 2018), the *Forum* on *China–Africa Cooperation* website (FOCAC, 2019) and the Macauhub website[3].

The first major systematic description of the relations between China and Mozambique can be found in a book coordinated by Sérgio Chichava and Chris Alden (2012), *A Mamba e o Dragão – Relações Moçambique-China em Perspectiva* [The Mamba and the Dragon – An Outlook on Mozambique-China Relations]. The book was published in 2012 by the *Institute of Social and Economic Studies* (IESE) and the South African Institute of International Affairs.

Additionally, several sectoral studies have been conducted, addressing areas such as the Chinese presence in Mozambique's agriculture[4] and forests[5], the diplomatic relations between China and Mozambique[6], the Chinese investment in the country[7], Official Development Assistance (ODA), the economy and trade[8], the impact of FOCAC[9], and labour relations between Chinese companies and Mozambican workers[10].

To achieve the research goal, it was necessary to answer the following research question: What are the characteristics of the Chinese economic presence in Mozambique during the second decade of the 21st century?

China's economic presence, which we will attempt to quantify, can be felt in three broad overlapping areas: the first is trade; the second covers both cooperation and ODA and includes cooperation initiatives and projects in various areas; the third area consists of FDI (Foreign Direct Investment) by a considerable number of Chinese companies operating in Mozambique. First, we tried to identify the economic and societal impact of the Chinese presence in areas such as employment and socioeconomic development. However, we found that the lack of reliable data, the different methodologies used to obtain these data, and the contrasting conclusions of the sectoral studies made it impossible to establish a reliable metric to assess that impact. Therefore, we decided to focus only on identifying the areas where the Chinese government has intervened, providing specific figures when possible.

The research question immediately raised several subsidiary questions: What are the trade links between China and Mozambique? What characterises China-Mozambique cooperation? How does China provide Official Development Assistance to Mozambique? In what sectors? What is China's FDI in Mozambique and where is it used?

We used an essentially descriptive and exploratory methodological approach[11] which consisted of analysing data from secondary sources (published studies and documents issued by government sources and International Organizations). The study is organized in five parts, where we attempt to answer the above questions. In the first, which introduces and contextualises the issue, we briefly describe the Chinese presence in the African continent; in the second, we discuss the relations between Mozambique and China and describe Mozambique's economic and financial situation; in the third, we attempt to assess the volume of trade between the two countries; in the fourth, we analyse China-Mozambique cooperation and the ODA China has made available, and in the fifth we analyse China's current foreign direct investment in this African country.

3. Macauhub available at: https://macauhub.com.

4. Chichava (2010; 2014).

5. Muianga and Norfolk (2017); Macqueen (2018).

6. Taylor (2009)

7. Liu (2009).

8. Ilhéu (2010); Roque (2009).

9. Hon, Jansson, Haifang, Burke and Kiala (2010).

10. Feijó (2012); Wethal (2017).

11. We used a descriptive approach in the sense defined by Gratton and Jones (2010), in that we collected data that describes facts about the links between Mozambique and China, and an exploratory approach in the sense used by Chui (2007), in as much as we explored the relations between China and Mozambique to collect knowledge, ideas and facts about the research problems and to identify variables associated with those problems. Mlambo *et al*. (2016) used the same methodologies in their article on China-Africa relations.

China in Africa

China's current presence in Africa has been widely documented, especially since the creation of the FOCAC in 2000. The FOCAC website describes this forum as a "platform established by China and friendly African countries for collective consultation and dialogue and a cooperation mechanism between the developing countries, which falls into the category of South-South cooperation" (FOCAC, 2019). Fifty-three African countries are members of this platform[12].

The last FOCAC summit, the seventh since the forum was created, was held in Beijing on 3th and 4th September 2018. The conference aimed to develop the Forum's work and deepen the strategic and cooperative partnership between China and Africa. To achieve this goal, the forum adopted by consensus the Beijing Declaration "Toward an Even Stronger China-Africa Community with a Shared Future". During the summit, the Chinese President stated that "Africa's infrastructure is seeing improvements thanks to these cooperation plans, which are expected to bring the continent 30.000-km of highways, 85-million-tonnes per year of harbour capacity, over 9-million-tonnes per day of water-cleaning capacity and about 20.000-megawatt power generating capacity, together with creating some 900.000 jobs." Also during the summit, an action plan was defined for 2019-2021 (FOCAC, 2019). With the implementation of the Belt One Road Initiative, China's presence on the African continent is expected to become increasingly visible[13].

China's importance to Africa has also been addressed in official Chinese documents such as the African Policy Papers of 2006 and 2015. In its second Policy Paper (2015), the Chinese government stated that it wished to clarify its determination and goodwill to develop friendly and cooperative relations with the African continent (CHINA.ORG, 2015)[14]. China's interest in the continent is also reflected in the number of visits by senior Chinese officials to African countries. Between 2008 and 2018, there were 79 visits to 43 different countries[15].

China is in Africa to gain access to its markets, natural resources, investment, and political and diplomatic support[16], as well as to project military power; in other words, it is defending its own interests.

China projects military power through the forces it deploys to United Nations peacekeeping missions, the most significant being the mission to South Sudan, to which it has committed over one thousand personnel. This is a form of power projection and a way to gain access to local oil[17]. China also has forces in Djibouti, where it has established its first military base outside the South China Sea. In addition to China, six other powers (USA, France, United Kingdom, Japan, Italy and Saudi Arabia) have bases in the country. From there, China can control the entire Bab el-Mandeb strait and help protect the region's shipping routes.

The relationship between Africa and China is one of mutual dependence. Africa needs China's assistance to spur its socioeconomic growth and development, as well as to gain access to the Chinese markets, investments, loans, ODA programmes and technology[18]. Another equally important factor is what we can call mutual political trust, since some

12. Available at https://www.focac.org/eng

13. The statement of the FOCAC Beijing Summit held in September 2018 reads: "Africa, being part of the historical and natural extension of the Belt and Road, has been an important participant in this initiative. The cooperation between China and Africa under the Belt and Road Initiative will generate more resources and means, expand the market and space for African development, and broaden its development prospects. We agree to form a strong synergy between the Belt and Road Initiative and the 2030 Agenda for Sustainable Development of the United Nations, Agenda 2063 of the African Union (AU), as well as the development strategies of African countries. The closer connectivity in policy, infrastructure, trade, finance and people-to-people ties, strengthened industrial capacity cooperation under the Belt and Road Initiative, and greater cooperation in the planning of African infrastructure and industrial development will lend new impetus to the win-win cooperation and common development between China and Africa"(FOCAC, 2019).

14. Among other aspects, the document explains that this cooperation will entail: "1. Enhancing political mutual trust; 2. Deepening cooperation in international affairs; 3. Deepening economic and trade cooperation; 4. Strengthening development cooperation between China and Africa; 5. Deepening and expanding cultural and people-to-people exchanges; 6. Promoting peace and security in Africa; 7. Strengthening exchanges and cooperation in consular, immigration, judicial and police areas" (CHINA.ORG, 2015)

15. The Global Sentinel website has detailed information on these visits, including locations, and dates and the names of visiting officials (GLOBAL SENTINEL, 2018).

16. A study by Mlambo *et al.* (2016) identifies four key elements of China's goals in Africa: access to resources; political support; access to markets; investment opportunities. Another study by Haroz (2011) identifies three priorities in China's investment in Africa: strategic diplomacy, ideological values and commercial benefit.

African political elites find China's government model more appealing than that of Western liberal democracies, as well as less intrusive regarding domestic issues when granting loans and making investments (BESADA; O´BRIGHT, 2017).

The Chinese presence in Africa has elicited different reactions and arguments from the general public, political elites, and even academicians. According to Afrobarometer (2016), a survey conducted in 36 African countries revealed that, when asked how they evaluated the Chinese influence in their countries, 63% of respondents rated China's economic and political influence as positive. However, some view China as a new neo-colonial power (CLINTON, 2011) that drains countries of their resources and contributes to underdevelopment and deindustrialisation (DE GRAUWE; HOUSSA; PICILLO, 2012), while preventing the world's most vulnerable countries from having control over strategic sectors of their economies (ABODOHOUI; SU; DA SILVA, 2018). Other arguments are that investing in authoritarian countries only benefits corrupt political elites and that there have been reports of Chinese firms not complying with local labour laws (ABODOHOUI; SU; DA SILVA, 2018).

Despite this, some researchers describe the Sino-African relationship as multifaceted and mutually beneficial (FANTU; CYRIL, 2010) and view China as a partner for African development in areas such as entrepreneurship, education and culture, pointing to numerous benefits in terms of infrastructures, job creation, increased productivity and higher living standards (ABODOHOUI; SU; DA SILVA, 2018), while others argue that if these investments are only benefitting the political elites and not the general population, the blame should not fall solely on the Chinese side but also on the shoulders of African leaders. (MLAMBO *et al*., 2016).

Quantifying China's ODA to Africa is not a straightforward task. First, as we mentioned earlier, the information on the topic is scarce and difficult to access. Second, it is not easy to distinguish ODA from FDI in the territory because a large part of this investment is conducted through Chinese state-owned enterprises that "should ideally help the States to fully play its national sovereign functions" (ABODOHOUI; SU; DA SILVA, 2018, p. 131). After analysing several sources, Besada and O'Bright (2017) suggest a value of US$75.4 billion between 2000 and 2011; on the other hand, Mlambo *et al*. (2016) propose rather different figures (over a very different period), identifying a total of US$37.7 billion in aid between 1950 and 2009. What these different analyses have in common is that the amounts are always significant, which points to a strong relationship between China and Africa.

China also aims to promote integration in the African continent by supporting cross-border projects and agreements with African sub-regional organizations and continental financial organizations such as the African Development Bank. In a symbolically charged investment, China financed the construction of the new headquarters of the African Union.

The beginning of the 21st century saw a tremendous increase in trade between China and the African continent. The statistics show that the volume of trade increased by 1000% between 2001 and 2008 (MLAMBO *et al*., 2016). By 2010, it had reached US$114.18 billion, making China

17. By May 2019, China had committed 2443 personnel to United Nations missions, 1041 of whom were deployed to the South Sudan mission. For more information on the Chinese blue helmets in South Sudan, see (UNITED NATIONS PEACEKEEPING, 2019). In the first 10 months of 2013 alone, Chinese companies invested more than US$20 billion in Sudan's oil sector and imported 1.9 million tons of oil from South Sudan (BESADA; O´BRIGHT, 2017).

18. For Haroz (2011), Africa has six interests that drive its partnership with China: infrastructural development; direct investment; favourable loan terms; debt relief; expanding trade and sustaining growth rates; access to technology and professionalised training.

Africa's largest trading partner. In 2014, this value increased to US$221.5 billion, corresponding to US$105.8 billion in imports from China and US$115.7 billion in exports, or an increase of 75% in trade volume in only four years (BESADA; O'BRIGHT, 2017)

Africa mainly exports natural resources, especially oil (China imports about 23% of its crude oil from Africa), and imports machinery, transport equipment and manufactured goods. However, that trade is quite concentrated, with 60% of Chinese exports going to six countries (South Africa, Egypt, Nigeria, Algeria, Morocco and Benin) and 70% of Chinese imports coming from only four countries (Angola, South Africa, Sudan, and Democratic Republic of the Congo) (RENARD, 2011). These data confirm what we already knew: that any studies on Africa should be mindful of the fact that Africa is not a homogeneous entity, but one that comprises 54 countries with distinct economic, financial, sociocultural and religious realities and very different regimes and systems of government. This means that global approaches do not reflect countries' individual realities, often leading to unfounded generalisations.

China's FDI in Africa seems to relate to trade and ODA, but its value is minimal when compared to China´s total FDI. This form of intervention in Africa was greatly encouraged by the Chinese government during the last decades of the 20th century as part of an internationalisation strategy to support growth and economic reform in China.

By 1991, China's FDI in Africa was US$1.5 million, representing 0.2% of the country's total FDI; in 2007, it had increased to US$4.46 billion, or 5.9% of the total FDI) (RENARD, 2011). China increased its FDI again in 2016, when it reached US$7 billion, which was still only 4.4% of the China´s total FDI. However, in 2017 there was a drastic reversal, mainly due to policies to contain capital outflows, and the Chinese FDI in Africa fell to US$1 billion or 0.6% of China's total FDI (HUANG, 2018).

A significant part of Chinese investments is made through large state-owned enterprises that receive state subsidies or loans, whose activities focus on natural resource exploitation and services such as the building of infrastructures. These large companies, as well as all their capital goods and labour, are imposed on African governments in return for loans and grants (ILHÉU, 2010). It should be stressed that these investments are welcomed by African governments due to their positive impact on the local economy and development but also to China's use of "soft power" (NYE, 1990) or even "sharp power" (NED, 2017)[19]. Moreover, China does not impose the strict rules required by organizations such as the European Union or the World Bank.

Currently, about 2200 Chinese companies continue to invest in the African continent despite numerous risks and challenges (ABODOHOUI; SU; DA SILVA, 2018).

Mozambique and China

The two countries have a longstanding relationship. The first records of Chinese presence in Mozambique date back to the late 19th century, when Chinese emigrants settled in the then city of Lourenço

19. The National Endowment for Democracy's / International Forum for Democratic Studies coined the term in a December 2017 report "*Soft Power'to 'Sharp Power': Rising Authoritarian Influence in the Democratic World".* In the report "what we have to date understood as authoritarian "soft power" is better categorized as "sharp power" that pierces, penetrates, or perforates the political and information environments in the targeted countries. In the new competition that is under way between autocratic and democratic states, the repressive regimes' "sharp power" techniques should be seen as the tip of their dagger - or indeed as their syringe".

Marques. They were well received because they provided a cheap skilled workforce (an alternative to the more expensive European workers), which the country needed to build infrastructure such as public buildings, railways and seaports (MEDEIROS, 2007).

This community was mainly based in Beira and Lourenço Marques. From the 1950s onwards it began to settle there with small industrial manufacturing units, and the younger generations, who had attended the official schools, began to take on public roles and jobs in private institutions (MEDEIROS, 2007).

The relations between the new Government installed after the 1975 Wars of Independence (particularly FRELIMO) and the People's Republic of China date back to the early 1960s, when China provided training to FRELIMO guerrillas (GARCIA, 2003). After Mozambique became independent, these relations were maintained and strengthened, with both countries formalising their diplomatic relations and establishing technical and even financial support and cooperation agreements. The relations between the two countries naturally changed as the international context evolved. While the bond between them was essentially ideological in the past, today, more than forty years after Mozambique's independence, it is mainly economic. Chris Alden and Sérgio Chichava (eds.) provide a detailed account of this evolution in the book China and Mozambique: From comrades to capitalists (CHICHAVA; ALDEN, 2014).

Paula Roque and Chris Alden (2014) describe the relations between the two countries as prudent and committed but also collaborative. These characteristics also describe the relationship between China and other African countries. The authors argue that Mozambique is still under strong influence by the Bretton Woods Institutions, international donors, western NGOs and local civil society. Furthermore, the activities of the Mozambique Liberation Front (FRELIMO) greatly influence and limit the economic policies of the Mozambican government, and the authors add that more than 50% of the Mozambican state budget comes from foreign financial aid (ROQUE; ALDEN, 2014).

Mozambique is one of the poorest countries in the world. According to data from the United Nations Development Programme (UNDP), it was ranked 180th in the Human Development Index in 2018, which means it has very low scores in socioeconomic indicators. More than 62.9% of the population lives on less than US$2 a day (UNITED NATIONS DEVELOPMENT PROGRAMME, 2018).

In the first decade of the 21st century, Mozambique had an average growth of 8% per year, mainly due to the funding of megaprojects and international assistance. From 2006 onwards the country's economic growth was sustained by significant investments in coal mining, the agricultural industry, construction sector services and in other industries(ROQUE 2009).

The World Bank has stated that the country is currently recovering from the recent episode of macroeconomic volatility and is having trouble achieving economic growth. After the remarkable growth of the last decade, the growth rate fell to 3.8% (less than half) in 2016. In 2017 there was another slight decrease to 3.7%, and in 2018 the growth rate was a mere 3.3%, with the economy still struggling to cope with the downturn that followed the debt crisis of 2016 (WORLD BANK, 2018).

The economy has slowed down due to a series of shocks, which included political and internal security instability, the decrease in the price of raw materials and adverse weather conditions. Another noteworthy factor was the "suspension of external support to the State Budget and the Balance of Payments by cooperation partners and the suspension of the International Monetary Fund programme for Mozambique following the discovery of undisclosed government debt" (BANK OF MOZAMBIQUE, 2016).

In addition to this weak growth, Mozambique is burdened by public debt, which rose from 40% to 115% of the GDP between 2006 and 2015 (BRANCO, 2017), reaching 128.3% in 2016 (INTERNATIONAL MONETARY FUND, 2008) and 111.9 % in 2017, corresponding to a public debt of US$10.3 billion (MACAUHUB, 2018a).

In 2012, China increased its financing by 160% compared to previous years, becoming the largest lender to Mozambique. In 2014, Mozambique's total debt to China was US$886 million (MACQUEEN, 2018). Following the FOCAC summit of 2000, China announced the cancellation of US$22 million of Mozambique's external public debt, and cancelled another US$52 million between 2001 and 2007, which corresponds to all accumulated debt between 1980 and 2005 (MUIANGA; NORFOLK, 2017).

At the 2015 FOCAC summit, China announced another cancellation of non-overdue interest until that year and a downward revision of interest rates on credits to be allocated in the coming years. Despite these relief and debt cancellation policies as a form of aid to Mozambique, in 2017 China remained Mozambique's second largest individual creditor[20]. According to the Report and Opinion of the Administrative Court on the 2017 State General Account, Chinese loans totalled US$1.8 billion, corresponding to 38.3% of Mozambique's total debt to third States. The document also states that, between December 2016 and December 2017, the country's debt to China increased by US$200 million, which did not include the debt incurred with the construction of Xai-Xai airport. The cost of facilities such as the Zimpeto National Stadium, the new Mavalane airport, the new Presidency building, the Circular Road, the Maputo-Katembe bridge, and the migration of the television and radio networks from analogue to digital were the main causes of the spike in public debt from only US$342 million in 2012/2013 (MACAUHUB, 2018a).

Trade relations between China and Mozambique

The ties between the two countries were renewed at the beginning of the 21st century. In 2001, an Economic and Trade Joint Committee was established, followed by several important bilateral agreements[21]. Also important was the founding, in 2003, of a Forum for Economic and Trade Cooperation between China and Portuguese-speaking countries. The Forum, with headquarters in Macau, was created on China's initiative to promote trade relations between its member countries, as well as to develop and implement common projects in various domains (ILHÉU, 2010).

20. Mozambique's largest lender is the International Development Association (IDA), a World Bank organization that has loaned the country a total of US$2.5 billion (MACAUHUB, 2018a).

21. The following agreements were signed: 2001 – agreement on trade; agreement on the promotion and reciprocal protection of investments; 2002 - agreement on human resources development, agriculture and environmental protection; 2004 - economic and technical cooperation agreement for agriculture, health, education and mining; 2007 - agreement to strengthen bilateral trade and economic relations for the period 2008-2009; 2007 - protocol of cooperation on military assistance; 2014 - cooperation agreement between the Bank of Mozambique and the People's Bank of China. For more on this topic see: Macqueen (2018).

The economic involvement between the two countries is reflected in increased trade ties. According to data from the Statistical Yearbook (INE, 2018), China is the fifth largest market for Mozambican exports. In 2017, exports from Mozambique to China reached US$252,608 million, corresponding to 5.35% of all exports, and the economic growth rate was 3.7% per year. In the fourth quarter of 2018 alone, these exports totalled US$164,544 million, corresponding to 12.29% of total exports, and the main exports were timber, natural sands, titanium ores, and seeds (INE, 2018). In 2011, the export volume reached US$167,692 million, or 4.7% of all exports.

Meanwhile, in 2017, imports totalled US$493,355 million, or 8.59% of the total. In the fourth quarter of 2018, the import volume was US$187,837 million, or 10.22% of the total, and the main imports were petroleum oil, tyres and vehicles (INE, 2019). As we mentioned earlier, this value amounted to US$374,659 million in 2011, or 5.9% of total imports (INE, 2012).

The specific case of timber exports is worth examining more closely. Mozambique is one of the largest exporters of timber to China and China "is the destination for approximately 93 per cent of all Mozambique's timber exports" (MACQUEEN, 2018, p. 8). About 50% of this wood is illegally exported[22]. Illegal logging has been widely discussed and studied due to concerns over its impact on the environment and on the sustainable development of the forest and its populations (MACQUEEN, 2018; MUIANGA; NORFOLK, 2017; ROQUE; ALDEN, 2012).

22. A 2012 report by the Environmental Investigation Agency states that "Chinese customs statistics show the import of 230.000 cubic meters of logs from Mozambique in 2011; conversely, Mozambique's data shows just 36.000 cubic meters of logs being shipped to China that year. This indicates widespread mis-declaration at the point of export, with containers of logs banned from export being falsely described as sawn timber" (EIA, 2012)

23. The ExIm Bank requires that the buildings for which the loans are intended be built by Chinese companies.

Cooperation and Official Development Assistance in Mozambique

Estimating the Chinese ODA to Mozambique is not an easy task due to the reasons already mentioned in this study – it is difficult to distinguish ODA from what is in fact FDI. For example, in 1997-1998, the Export-Import Bank of China (ExIm Bank)[23] created a fund of US$20 million to encourage Chinese companies to do business in Mozambique "(…) and to build a new embassy and a commerce centre administered by the Economic and Commercial Counsellor's Office in downtown Maputo (…)" (ROQUE; ALDEN, 2012, p 14).

With the end of the Civil War in Mozambique, China's aid increased. This financing helped build the new Parliament, the Ministry of Foreign Affairs, the Joaquim Chissano Conference Centre, as well as to build military housing for soldiers. The aid also came in the form of donated military equipment and training (ROQUE; ALDEN, 2012).

China and Mozambique have bilateral cooperation agreements in areas such as health, education, agriculture, infrastructure, and security and defence. This support consists of grants, technical assistance, and interest-free or low-interest loans (CHICHAVA, 2012). The list provided here is not comprehensive and includes only those which we considered to be the most significant.

The Umbeluzi Agricultural Institute, the first pilot project for agricultural technology cooperation, was established in the wake of FOCAC 2006. That same year, a soft loan of US$50 million was granted to build three processing plants and to import agricultural machinery and technology (EKMAN, 2012).

This bilateral cooperation was further strengthened with President Hu Jintao's visit to Mozambique in 2007. President Hu Jintao pledged an additional US$170 million in loans and cooperation in the areas of agriculture, technology, education, health, the economy, and natural resource exploration. During the visit, China granted Mozambique a concessional loan of about US$40 million for the construction of three buildings for the Attorney General's Office and a concessional loan of US$15.4 million to build a national stadium in Maputo with the capacity to hold 42 thousand people (CORREIA, 2010).

That same year, an agreement was signed with the Eduardo Mondlane University to conduct research on rural development and agriculture (ROQUE; ALDEN, 2012). China also contributes to the tourism sector by listing Mozambique as a tourist destination for Chinese citizens. Mozambique is one of the African countries classified as a "recommended" destination for Chinese tourists. The Chinese Government also increased the number of Mozambican duty-free products from 190 to 442 (CORREIA, 2010). In terms of military cooperation, a military assistance protocol was signed between the Armed Forces General Staffs of both countries and the Chinese Government also granted US$1.5 million to refurbish several departments of the Mozambican armed forces (ROQUE; ALDEN, 2012).

In 2008, both countries signed a Cooperation Agreement on Scientific and Technological Innovation. The agreement had three main goals: to increase agricultural research activities by financing the Centre for Agricultural Research and Technology Transfer in the district of Boane and the Moamba Technological Park; to create a health science centre for research in infectious diseases; and to train Mozambican staff in Masters and PhD programmes in China (CORREIA, 2010). That same year, a group of about 100 Chinese experts, which included a team from the Hunan Hybrid Rice Institute, arrived in Mozambique to support the irrigation channel network project (MACAUHUB, 2008).

Sérgio Chichava (2010) lists several grants to Mozambique between 2007 and 2012. China provided assistance to flood victims (US$400 thousand) and funded the construction of four schools in Maputo, Gaza, Nampula and Niassa (about US$3 million) and a Centre for the Prevention and Treatment of Malaria in Maputo. This centre, and the centre in Boane mentioned above, were part of a list of Chinese promises to African countries at FOCAC 2006. Earlier 2019, China announced that it had granted 36 scholarships for first degree students and 5 scholarships for Master's students in the 2019/2020 school year (MACAUHUB, 2019).

China's FDI in Mozambique

In 1999, the Chinese Ministry of Foreign Trade and Economic Cooperation invested US$12 million to establish the *Centre* for *Investment Promotion Development and Trade* of *China* (CPIDCC) in Maputo, one of eleven investment promotion centres set up in Africa by the Chinese government.

The centre works with the CPI to facilitate Chinese investment in Mozambique (HON *et al.*, 2010).

According to a report by the Centre for Chinese Studies of the Stellenbosch University, data from the CPI shows that between 1990 (the year China started investing in Mozambique) and 2007, China's FDI in Mozambique was US$148 million, of which US$69 million were invested after 2003 (HON *et al.*, 2010). The following year (2008), China invested US$76.8 million in the territory, becoming the second largest investor after South Africa (HON *et al.*, 2010).

During the first decade of the 21st century, 80% of China's FDI in Mozambique went to four investment projects, three in the industrial sector and one in the aquaculture and fisheries sector[24] However, despite these significant figures, during the first decade of the century the Chinese investment in Mozambique represented only 2% of the total FDI, which amounted to US$10.6 billion (CHICHAVA, 2010).

Until 2012, much of China's investment was concentrated in the manufacturing sector (77%), followed by aquaculture and fisheries (12%) and agriculture, agroindustry and construction (4%) (CHICHAVA, 2010). The projects funded by these investments were mainly based in Maputo. Today, the Chinese FDI in Mozambique focuses on building infrastructure and on the forestry, agriculture and mining sectors.

This investment in infrastructure has helped to build several government buildings and renew the road network. There are several Chinese construction companies which regularly outbid other foreign companies in the international tenders issued by the Government or the World Bank (ROQUE; ALDEN, 2012). Thanks to their competitive prices, Chinese companies are responsible for carrying out more than one third of the country's road construction and are involved in the rehabilitation of urban water supply systems in Maputo, Beira and Quelimane. This state of affairs has been widely protested by companies with Mozambican capital, who complain of unfair competition (NIELSEN, 2012). Moreover, there have been numerous reports of labour disputes in Chinese companies (BUNKENBORG, 2012; FEIJÓ, 2012; WETHAL, 2017).

In 2006, the Mozambican government loaned US$2.3 billion from the ExIm Bank to build the Mphanda Nkuwa Dam on the Zambezi River, US$300 million to build the Moamba-Major Dam, US$100 million to build three sports stadiums (CORREIA, 2010), and took out another smaller loan to refurbish the capital's airport (ALVES, 2005).

During Prime Minister Aires de Aly's visit to China in 2010, the Chinese government declared its intention to fund several projects in Mozambique, for a total of about US$172 million in the form of grants, interest-free loans and low-interest loans (CHICHAVA, 2010). Later, in August 2011, during Mozambican President Armando Guebuza's visit to China, an agreement on financial cooperation was signed with the China Development Bank (CBD). The agreement aimed to introduce trade credits for the private sector in Mozambique, as well as to fund public investment, which implied greater involvement of the CBD in the Mozambican financial sector (ROQUE; ALDEN, 2012).

24. The four investment projects are: an Africa Great Wall Cement Manufacturer plant in Marracuene; a CIF MOZ cement factory in Matutuine; the Hong & Binga Development Fishery Company, which operates in industrial fishing and shipbuilding, among other areas; and the Henan Haode Mozambique Industrial Park, which aims to develop a textile and clothing industry in Marracuene district.

In 2011, the Mozambican government compiled a list of projects to be developed in cooperation with the People's Republic of China. Of these, twenty were deemed priorities in alleviating the infrastructure deficit (valued at US$1.398.2 million). The list was submitted to the Chinese government for consideration, and the approved projects were funded through concessional loans from the ExIm Bank. More than 60% of these projects are in the infrastructure sector (refurbishment and modernisation of the Maputo International Airport; construction of 900Km of power lines; construction of the new building of the Council of Ministers; construction of housing for officers of the State's Intelligence and Security Services; construction of sports infrastructures, etc.) (CHICHAVA, 2010). As part of this investment, in 2012 the ExIm Bank began financing the circular road project in Maputo (US$400 million) and the Maputo-Katembe Bridge (US$1.1 billion), which was inaugurated in June 2018.

With millions of hectares of arable land (36 million), 19 million hectares of productive forest land and a vast river network, Mozambique has a remarkable agricultural potential. This potential has attracted Chinese FDI, which focused on logging projects in the first decade of the 21st century. During this period, four of the eight projects approved by the CPI were in logging and timber trade and two were in the food production sector. This investment represented only 4% of the total Chinese investment for the same period (CHICHAVA, 2010).

Of over 700 forestry companies operating in Mozambique, more than 200 have Chinese capital, and of the 289 forest concessions we identified, 60 have been awarded to Chinese investors (CHICHAVA, 2010). To address the lack of standardised practices among these companies and concessions and encourage sustainable investment, the Chinese government issued a document titled "Guidelines for Sustainable Trade and Investment for Forest Products for Chinese Overseas Enterprises" (MACQUEEN, 2018).

In 2009, as part of its effort to support agricultural investment in the Zambezia Province, the ExIm Bank granted a loan of US$50 million to the Cabinet Planning for the Development of Zambezi Valley for agricultural projects in the valley. The funds were used to purchase agricultural machinery (US$20 million) and in industrial units in Tete, Zambeze and Manica (US$30 million) (ILHÉU, 2010).

FDI in Mozambique has focused on these mega projects. In the mining sector, Brazil and India have made significant investments in the Moatize Coal mines, while the heavy sands mines in Moma (Angoche) are largely funded by Korean money. However, China did not invest heavily in mining during the first decade of the century, with only a few private mining companies operating in the gold mining and trading sector. It was only in 2012 that Chinese companies began to show interest in the coal industry in Tete, with the China Kingho group and WISCO committing to initial investments of US$5 billion and US$800 million, respectively (CHINA DAILY, 2010). The China Kingho Group has also shown interest in research and exploration of oil, natural gas and other mineral resources (ILHÉU, 2010).

The latest statistics issued by the Industrial and Commercial Bank of China show that 70% of Chinese FDI in Mozambique is allocated to natural resources, including gas and oil (AFRICAN DAILY VOICE, 2019). In 2010, the Daqing Oilfield Drilling Engineering Company won an international tender to drill for natural gas in Mozambique (MACAUHUB, 2010). Finally, the Africa Great Wall Cement Manufacturer was granted a license to mine for limestone and heavy mineral sands in the Angoche district (CHICHAVA, 2010).

These recent investments in the mining, oil and gas sectors constitute a significant change in the patterns of Chinese FDI in Mozambique, which has not only increased but also become more geographically disperse.

In 2014, Chinese FDI had a significant impact on the industrial sector with the inauguration of a car assembly plant in Maluana by Matchedje car, a company valued at US$50 million. The company eventually went bankrupt in 2018.

The Chinese FDI in Mozambique has grown noticeably, and there are over 100 Chinese companies operating in a variety of areas, such as energy, agriculture, fisheries, real estate, construction materials, tourism, transport, telecommunications, infrastructure and trade. According to data from the Chinese Embassy in Maputo, the accumulated Chinese FDI in the territory was already approaching US$6 billion by March 2017 (MACAUHUB, 2017a) and would reach US$173 million in the first half of 2017 (APIEX, 2017).

In 2018, the total FDI in Mozambique was US$2.3 billion, which marked a sharp decrease (26%) when compared to 2017. This indicator has been declining since 2013, when FDI in the country reached US$6.175 billion. However, projects in the oil, natural gas and coal exploration sectors are beginning to attract Chinese investors and this indicator is expected to recover in the medium to long term (UNCTAD, 2018).

Despite this sharp downturn in foreign investment, China continues to invest in the territory. Holding 20% of the South Coral exploration project, the China National Petroleum Company is the second largest shareholder in the natural gas sector. This project has received US$4.8 billion in funding from several organizations, including the ExIm Bank (MACAUHUB, 2017b). The Chinese ambassador in Maputo, JSu Jian, reiterated China's intentions to continue investing and recalled that there are several other projects in a list compiled by the Mozambican government in a memorandum of understanding signed in 2017. This memorandum covers several priority areas (industrial parks, roads, agriculture, exploration of natural and energy resources and ports) (MACAUHUB, 2018b).

The China Railways International Group is also expected to finish building a cabotage port in Chongoene and railway links to the Limpopo Corridor in Macarretane, as well as extensions to important projects such as the Chibuto heavy sands exploration project in Gaza and the Jangamo project in Inhambane, which are valued at about US$3 billion (MACAUHUB, 2018c). The company will also build the new Save River Bridge in Inhambane province, which represents an investment of about US$100 million (MACAUHUB, 2018d). Mozambique is currently negotiating financing to build a vocational and technical training institute in Gorongosa (MACAUHUB, 2018e). In 2016, at the Beijing Business Forum, the Mozambican president challenged Chinese entrepreneurs to invest in four pivotal areas: agriculture, energy, tourism and infrastructure (NYUSI, 2016).

On 2nd September 2018, on the eve of the seventh FOCAC Summit, the President of the Republic of Mozambique, Filipe Nyusi opened a business forum in Beijing, during which Mozambique and China signed eight memorandums of understanding on infrastructure, industry, telecommunications, agriculture and financial services[25].

In a clear demonstration of mutual interest in cementing the relations between the two countries, Filipe Nyusi, attended the One Belt One Road Conference hosted by Beijing on 25th and 26th April 2019. On this occasion, Nyusi assured the Chinese President that he was personally invested in the success of the initiative and highlighted the need to exchange experiences on governance (DIÁRIO DE NOTÍCIAS, 2019).

Conclusion

China has made use of different instruments of power, such as military power projection and the FOCAC, to defend its interests in Africa. In order to achieve its goals, China has strengthened its diplomatic ties, exponentially increased its trade volume, provided ODA and facilitated cooperation, and focused its investments in the exploration of natural resources.

However, the Chinese presence is not evenly distributed across the continent. Africa is an entity that represents multiple countries, therefore, global approaches do not reflect countries' individual realities, which often leads to unfounded generalisations. For example, China maintains trade relations with only half a dozen countries, and the Chinese FDI for the entire continent, albeit very significant (US$7 billion), represents only 4.4% of the total Chinese FDI in 2016.

Much of China's ODA and FDI is channelled through large state-owned enterprises, which are imposed on African governments with all their capital goods and labour in return for loans and grants. It should be stressed that China's use of "soft power", or even "sharp power", is welcomed by African governments, mainly due to its impact on the economy and local development, but also because China does not impose the strict rules required by organizations such as the European Union or the World Bank.

Based on this analysis, we can conclude that, today, the relations between China and Africa are multifaceted and mutually beneficial. On the one hand, in terms of socioeconomic development, African countries greatly benefit from a strong and growing Chinese presence. On the other, China needs Africa's markets, resources and political and diplomatic support.

Mozambique, one of the countries with the lowest socioeconomic indicators in Africa, is currently coping with a strong debt burden and an economic downturn. By 2017, China had invested an accumulated value of over US$6 billion in the territory, becoming one of the country's main economic partners and its second largest individual lender.

Mozambique currently views the longstanding relations between the two territories as cautious but both countries have committed to strengthening their bilateral economic cooperation ties.

25. On 2nd September 2018, the portuguese newspaper *Expresso* reported that "In the infrastructure sector, memoranda were signed for the construction of a road between Niassa province, in the far northwest of the country, and Tanzania, and for the repair of National Road Number Six, linking the city of Beira, in Sofala, to the border village of Machipanda in Manica province. Another memorandum between the National Road Administration of Mozambique and the China Road and Bridge Corporation includes the construction of a road section between Pambara, in Vilanculos district, and Mangungumete, in Inhassoro district, in the southern province of Inhambane. Another document outlines the construction of an integrated transport system between the Limpopo Valley and the Chongoene port in southern Gaza province. Industrial parks in Boane and Marracuene, in the Maputo province, are part of the memorandum signed between the Mozambican Ministry of Industry and Trade and the China Civil Engineering Construction group. The Ministry of Agriculture and Food Security of Mozambique signed a memorandum with the China Railway 20 Bureau Group Corporation and the Northwest University. In the telecommunication's technology sector, Chinese company Huawei signed a memorandum of understanding with Mozambique Mobile, while in the financial area Mozambican bank Millennium Bim signed a memorandum with UnionPay, a leading Chinese electronic payment systems company." (EXPRESSO, 2018).

These economic and trade links have gained new momentum in the current century. China is now the fifth largest market for Mozambican exports, and in 2017 it was the largest (legal and illegal) export market for Mozambican timber. That same year, China was also the country's third largest importer, with a share of about 9% of all Mozambican imports.

With the end of the Mozambican Civil War, China increased its ODA to Mozambique and signed cooperation agreements in areas such as health, agriculture, infrastructure, and security and defence. This assistance consists of grants, technical training (civilian and military), interest-free or low-interest loans and significant funding for public infrastructures. China also provides funding for science and technology through scholarships and research and technology transfer centres, particularly in the agriculture and health sectors.

Chinese investment in the country dates back to the 1990s and has been growing exponentially since. A large part of this investment is channelled through large state-owned enterprises, which mainly focus on manufacturing, natural resource exploration (minerals, agriculture and forest resources) and services such as facilities construction. The Mozambique government has made several investment requests to the Chinese state, which are compiled in a list of projects that have been submitted for consideration (totalling over €1 billion).

Despite the sharp decline in FDI since 2017, China continues to invest in Mozambique. However, the investment trend shows a transition from the industrial and agricultural sectors to the mineral resources and natural gas sector, significantly changing the geographical distribution of Chinese investments, which are moving from the south of the country to the centre and north of the territory, with all the socioeconomic and even security implications this entails.

The preceding study of China's economic involvement in Mozambique provides a set of data and framework of analysis that may assist in understanding how China gains and projects power in other resource-rich African countries with similar political regimes, as in the case of Angola. That said, this study is essentially focused on economic relations. And, of course, not all power is merely economic. What is now required is a more comprehensive analysis of the nature and dynamic of politico-diplomatic relations, and the role of economic ties therein, between African states and China.

In conclusion, today, the Chinese presence in Mozambique is the result of a multifaceted and mutually beneficial economic relationship. Mozambique benefits from Chinese trade, investment and ODA, which have an important impact not only on its socioeconomic growth and development but also on making the country less dependent on traditional donors, whereas China draws important diplomatic and economic benefits from its relationship with a country rich in natural resources. Furthermore, Mozambique holds an important geostrategic position and exerts a powerful influence throughout the entire east Africa region, controlling not only the Mozambique Channel but also all points of entry into the countries of the Southern Hinterland.

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