

**Beltways of Agency:
Drivers, Modalities and Outcomes of Chinese Engagement
in Ethiopian Infrastructure Investments**

Valeria Lauria

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International Institute of Social Studies of Erasmus University Rotterdam
and
Sant'Anna School of Advanced Studies

Beltways of Agency: Drivers, Modalities and Outcomes of Chinese Engagement in Ethiopian Infrastructure Investments

**Ringwegen van agency: aanjagers, modaliteiten en
resultaten van Chinese betrokkenheid bij
investerings in de Ethiopische infrastructuur**

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Abstract

China's increasing presence in Africa has raised concerns among scholars, policy makers, and practitioners about the potentially exploitative outcome of this encounter. The core idea behind this concern is that of a one-way domination of a passive and submissive Africa by a monolithic China. This doctoral research aims to contribute to the body of literature on China-Africa relations by studying China's presence in the Ethiopian infrastructure sector as an ideal case to examine this polemic, given both the importance of infrastructure investment in Ethiopia's development strategy and the dominance of Chinese involvement within such investment, with Ethiopia receiving the second-largest amount of Chinese infrastructure financing in Africa. It is against this background that this dissertation investigates Chinese-financed, Chinese-built infrastructure in Ethiopia. To do so, the thesis advances a new interpretative concept, the Global Infrastructure Network (GIN) framework. This concept maps infrastructure projects with negotiations between different actors at the global, national, and local levels. It helps to grasp how these levels are interconnected with one another and, therefore, to identify otherwise-hidden socioeconomic and political factors shaping the expressions of agency of different actors involved at different stages of the design, financing, and implementation of infrastructure projects. The framework also helps to assess how infrastructure projects are integrated into global, national, and local economies and to scrutinise their potential to generate positive development synergies and drive favourable economic outcomes. The result is a portrait of actors, power relations, incentives, and interests at play in China-Ethiopia relations in the infrastructure sector.

The research sheds light on how, despite the diversity and fluidity of Chinese companies' behaviour and their multifaceted effects, their presence in the Ethiopian infrastructure sector exhibits positive development synergies through creating employment opportunities, accelerating technology transfer, and diversifying the production structure. It also questions the assumption of African passivity in the Ethiopian case. When one reads infrastructure projects as the result of negotiations occurring at several levels and different moments in time, my fieldwork evidence suggests that Ethiopian actors have been able to pursue their interests before, during, and after the implementation of infrastructure projects, albeit with differences in the immediate effectiveness of their actions.

This research therefore contributes to the debate on China-Africa relations at four levels. First, it advances a new conceptual tool, the GIN, that helps to interpret foreign-financed, foreign-built infrastructure projects with a map of actors, negotiations, modalities, and outcomes. Second, it sheds light on the increasing dominance of Chinese firms in the Ethiopian infrastructure sector by exploring the drivers of Chinese firms' engagement in the sector. Specifically, it shows how political and

commercial interests are strongly interlinked. On the one hand, Chinese banks and state actors play an important role in crafting normative and financial conditions to support the expansion of Chinese firms in Africa. On the other hand, Chinese firms are increasingly operating beyond the Chinese government's control and tend to follow self-interested commercial objectives. Third, the study offers a comprehensive account of how Ethiopian state and nonstate actors pursue their interests inside and outside state-led negotiations with their Chinese counterparts and shape the engagement outcome. Fourth, it presents new evidence to challenge the idea of Chinese infrastructure projects as secured enclaves. In the case of the Ethiopian infrastructure sector, several Chinese companies show an increasing integration with the local economy. However, the study suggests that the local industry makeup, marked by lack of regulations and weak local capabilities, and the characteristics of Chinese firms can condition the formation of development linkages.

Samenvatting

De toenemende aanwezigheid van China in Afrika baart wetenschappers, beleidsmakers en vakmensen zorgen omdat deze ontwikkeling tot uitbuiting zou kunnen leiden. Er wordt gevreesd voor een eenzijdige overheersing van een passief en onderdanig Afrika door een monolithisch China. Het doel van deze studie is om een bijdrage te leveren aan de literatuur over de betrekkingen tussen China en Afrika door onderzoek te doen naar de aanwezigheid van China in de Ethiopische infrastructurele sector. Gezien het belang van investeringen in infrastructuur in de ontwikkelingsstrategie van Ethiopië en de dominante Chinese betrokkenheid bij dit soort investeringen, is deze sector bij uitstek geschikt om deze problematiek te onderzoeken. Ethiopië ontvangt het op één na grootste bedrag aan Chinese infrastructurele financiering in Afrika.

Tegen deze achtergrond staat in dit proefschrift de door China gefinancierde en gebouwde infrastructuur in Ethiopië centraal. Het proefschrift beschrijft een nieuw analytisch concept: het Global Infrastructure Network (GIN)-kader. Hiermee worden infrastructurele projecten in kaart gebracht waarbij sprake is van onderhandelingen tussen verschillende actoren op mondiaal, nationaal en lokaal niveau. Met dit kader wordt zichtbaar hoe deze niveaus met elkaar verbonden zijn. Dit helpt om sociaaleconomische en politieke factoren te onderscheiden die anders verborgen blijven en die gestalte geven aan het optreden van verschillende actoren die betrokken zijn bij verschillende stadia van het ontwerp, de financiering en de uitvoering van infrastructurele projecten. Daarnaast kan met dit kader de integratie van infrastructurele projecten in de mondiale, nationale en lokale economie worden beoordeeld en kunnen de mogelijkheden om met deze projecten positieve ontwikkelingssynergieën te genereren en gunstige economische resultaten te behalen nader worden onderzocht. Dit levert een beeld op van de actoren, machtsverhoudingen, prikkels en belangen die een rol spelen bij de Chinees-Ethiopische betrekkingen in de infrastructurele sector.

Uit het onderzoek blijkt dat de aanwezigheid van Chinese bedrijven in de Ethiopische infrastructurele sector positieve ontwikkelingssynergieën oplevert, ondanks de diversiteit en dynamiek in het opereren van deze bedrijven en de uiteenlopende effecten van de bedrijfsactiviteiten. Dit komt door het creëren van werkgelegenheid, het versnellen van technologieoverdracht en het diversifiëren van de productiestructuur. Verder worden er vraagtekens geplaatst bij de veronderstelling van Afrikaanse passiviteit in het geval van Ethiopië. Wanneer infrastructurele projecten worden beschouwd als het resultaat van onderhandelingen die op verschillende niveaus en verschillende momenten plaatsvinden, blijkt uit het veldonderzoek dat Ethiopische actoren in staat zijn hun belangen vóór, tijdens en na de uitvoering van infrastructurele projecten te behartigen. Hun handelen is echter niet in alle gevallen onmiddellijk effectief.

Dit onderzoek levert dus op vier niveaus een bijdrage aan het debat over de betrekkingen tussen China en Afrika. Ten eerste is er een nieuw conceptueel instrument ontwikkeld, het GIN, dat met een kaart van actoren, onderhandelingen, modaliteiten en resultaten inzicht biedt in door het buitenland gefinancierde en gebouwde infrastructurele projecten. Ten tweede werpt het licht op de toenemende dominantie van Chinese bedrijven in de Ethiopische infrastructurele sector door de aanjagers van de betrokkenheid van Chinese bedrijven bij de sector te onderzoeken. In het bijzonder toont het de sterke verwevenheid tussen politieke en commerciële belangen. Enerzijds spelen Chinese banken en overheidsactoren een belangrijke rol bij het scheppen van normatieve en financiële voorwaarden om de expansie van Chinese bedrijven in Afrika te ondersteunen, en anderzijds opereren Chinese bedrijven in toenemende mate onafhankelijk van de Chinese overheid en op basis van hun eigen commerciële belangen. Ten derde beschrijft dit proefschrift uitgebreid hoe Ethiopische overheids- en niet-overheidsactoren hun belangen binnen en buiten de door de overheid geleide onderhandelingen met hun Chinese partners behartigen en het resultaat van het overleg beïnvloeden. Ten vierde levert het nieuwe aanwijzingen die ingaan tegen het idee van Chinese infrastructurele projecten als afgeschermdes enclaves. Binnen de infrastructurele sector in Ethiopië geven verschillende Chinese bedrijven blijk van een toenemende integratie in de lokale economie. Het onderzoek wijst er echter op dat enerzijds de lokale industrie, die gekenmerkt wordt door een gebrek aan regelgeving en zwakke capaciteiten op lokaal niveau, en anderzijds de kenmerken van Chinese bedrijven bepalend kunnen zijn voor de vorming van ontwikkelingsverbanden.

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Selected List of Acronyms

ADLI	Agricultural Development-Led Industrialisation
AfDB	African Development Bank
AIIB	Asian Infrastructure Investment Bank
AU	African Union
BRI	Belt and Road Initiative
CARI	China Africa Research Initiative
CBE	Commercial Bank of Ethiopia
CCP	Chinese Communist Party
CDB	Chinese Development Bank
CHEXIM	China Exim Bank
CSA	Central Statistics Agency
DAC	Development Assistance Committee
DBE	Development Bank of Ethiopia
EEA	Ethiopia Energy Authority
EEA	Ethiopian Economics Association
EEPCO	Ethiopian Electric Power Corporation
EEU	Ethiopia Electric Utility
EFFORT	Endowment Fund for the Rehabilitation of Tigray
EIC	Ethiopian Investment Commission
EPLF	Eritrean People's Liberation Front
EPRDF	Ethiopian People's Revolutionary Democratic Front
EPRP	Ethiopian People's Revolutionary Party
FDI	Foreign Direct Investment
FOCAC	Forum on China Africa Cooperation

GDP	Gross Domestic Product
GIN	Global Infrastructure Network
GTP	Growth and Transformation Plan
HIPC	Highly-Indebted Poor Country
IDS	Industrial Development Strategy
IMF	International Monetary Fund
METEC	Metals and Engineering Corporation
MOFCOM	Chinese Ministry of Commerce
MoFEC	Ministry of Finance and Economic Cooperation
MOU	Memorandum of Understanding
NBE	National Bank of Ethiopia
NDB	New Development Bank
NPC	National Planning Commission
ODA	Official Development Assistance
OECD	Organisation for Economic Cooperation and Development
PRC	People's Republic of China
SMEs	Small and Medium Scale Enterprises
SOE	State-owned Enterprise
SSA	Sub-Saharan Africa
SSC	South-South Cooperation
TU	Trade Union
UNCTAD	United Nations Conference on Trade and Development
WB	World Bank
WTO	World Trade Organization

CHAPTER ONE—INTRODUCTION

1.1 Introduction

Imagine a country named A. A needs to implement many infrastructure projects quickly and at low cost to unlock its development potential. Imagine also a country named B. B is a superpower that can support its firms operating abroad. With this support, firms can offer very competitive prices and operate highly efficiently. A has some construction firms, but these firms cannot achieve the same technological level as B's firms and they have much lower skills. Moreover, A has a low proportion of manufacturing and a low industrialisation level. Meanwhile, firms from B can bring their own workforce and equipment. First, imagine being a manager of one of these firms: it seems it would be perfect to run your business in A and enjoy a significant advantage. Second, imagine being a development scholar: A seems to be a textbook example of foreign dominance without development linkages. Now let us give real-world names to the two countries. A is Ethiopia, and B is China.

In the real world, Ethiopia ranks as one of the key recipients of Chinese financing and one of the largest African markets for Chinese contractors working in the infrastructure sector.¹ Chinese officials have been able to negotiate very good conditions for their firms. Chinese firms are entering the Ethiopian infrastructure sector in significant numbers. Meanwhile, Ethiopian firms, workers, and regional and federal officials are choosing strategies to suit different conditions in the sector. Seen through these lenses, the relation between China and Ethiopia becomes more complex, and, maybe, our conclusions on the impact of Chinese firms in the Ethiopian infrastructure sector become less straightforward.

Therefore, my question is: to what extent does Chinese dominance in the Ethiopian infrastructure sector contribute to positive development synergies? This dissertation addresses this question by looking at Chinese-financed, Chinese-built infrastructure projects in Ethiopia.

In this thesis the infrastructure sector is broadly defined to include telecommunications systems, electricity production and distribution systems, transportation (including roads, bridges, and

¹ The top five countries are Angola, Ethiopia, Algeria, Kenya, and Nigeria. These countries alone account for 53 percent of 2017 gross annual revenues for construction projects implemented by all Chinese companies in Africa. (SAIS-CARI 2018).

railways), and water facilities for water-resource management.² By “Chinese-financed, Chinese-built infrastructure projects”, I mean infrastructure projects that are financed by China and implemented by Chinese firms—which either engage with Ethiopian firms and workers or engage solely with other Chinese firms and workers—through interactions with Ethiopian state and nonstate actors, who may (or may not) shape the length, character, and impact of the project. My dissertation focuses on the motives and mechanisms of Chinese engagement, the role of local actors, and the outcomes for local development.

The literature on China-Africa relations has traditionally focused on Chinese foreign direct investment (FDI) and access to resources. As a result, with some exceptions (Mohan 2013; Gadzala 2015; Gu et al. 2016; Wolf and Cheng 2018; Oya and Schaefer 2019), analysts have largely overlooked Chinese companies’ engagement in countries that lack natural resources and ignored a sector, infrastructure, much more important in size and scale than FDI. Moreover, the literature tends to focus on only Africa or China, not both, thereby taking an unbalanced perspective. This thesis gives both countries the same importance. The aim is thus not only to evaluate how Chinese engagement in the infrastructure sector shapes broader processes of development in Africa, but also to scrutinise how the actors involved shape these processes and, in turn, their outcomes. This entails clarifying the interests of different actors and providing a portrait of the processes, pressures, conditions, and reciprocal incentives involved.

Over the past twenty years, the People’s Republic of China (hereafter China) has increasingly established itself as a prominent player across Africa. From 2000 to 2015, China’s government, banks, and contractors extended US\$ 94.4 billion worth of loans to African governments and state-owned enterprises (SOEs) (SAIS-CARI). At the same time, since the turn of the new millennium, China has emerged as Africa’s largest trading partner, with trade volumes increasing from US\$ 13 billion to US\$ 180 billion between 2001 and 2015—an average annual growth rate of 21 percent (McKinsey 2016). Similarly, since China joined the World Trade Organization (WTO) in 2001, its FDI in Africa has grown rapidly, helped by its “going out” strategy. The China Africa Research Initiative at the Johns Hopkins University School of Advanced International Studies (SAIS-CARI) estimates that the stock of China’s FDI in Africa rose from US\$ 26 billion in 2013 to US\$ 35 billion in 2015. Meanwhile, the flow of Chinese FDI to Africa fell from US\$ 3.4 billion in 2013 to US\$ 3

² The expressions “infrastructure sector” and “construction sector” are used interchangeably throughout the thesis.

billion in 2015 because of a slowdown in China's economic growth and falling of commodity prices.³ Findings also show that since the launching of China's going-out strategy and its announcement of the Belt and Road Initiative (BRI), its engagement in Africa's infrastructure has gained momentum. Today Africa is the largest overseas market for Chinese construction companies (Wolf and Cheng 2018).⁴

The growing scale of engagement between China and Africa is at the heart of an ever-expanding literature with opposing interpretations. This disagreement has caused heated debate about the primary motivating factors for their relation, the relation's implications for the global economy, and, most importantly, the relation's implications for the development of Africa (see, for example, Bräutigam 2011, 2015; Corkin 2011; Chin and Frolic 2007; Dollar 2008; He 2007; Gu et al. 2008; Li 2007; Mohan 2013).

Many observers think China will provide Africa with the foundation for economic growth and help the continent finally industrialise. Central to this side of the debate is the work of a few authors who contend that China's new role has the potential to bring advantages to both parties. On their view, China can improve Africa's prospects for development through win-win business partnerships that will develop Africa's infrastructure and manufacturing sectors and boost its social and economic development (Bräutigam 2009; Sautman and Hairong 2007). Zhao (2014) points out that the Chinese focus on funding infrastructure is filling a critical gap left by Western donors.⁵ Bräutigam (2011), among many others (for example, Greenhill et al. 2013; Prizzon et al. 2016), stresses the positive impact of China on African countries' negotiating power with traditional donors.

Following the same line of argument, several studies contend that China's economic engagement is delivering a number of important economic benefits in the infrastructure sector: it provides a substantial source of much-needed investment to address Africa's massive infrastructure gap; it promotes innovation in technology and management practices; and it increases market access. These

³ Chinese FDI in Africa peaked in 2008 at US\$ 5.5 billion, surpassing that of the United States for the first time (UNCTAD 2018).

⁴ The increasing number of Chinese contractors in Africa is paralleled by a decrease of European construction firms, whose share of revenues in the African market decreased from 50 percent in 2004 to 20 percent in 2017. In 2017 60 percent of contract revenues of the top 250 international contractors in Africa went to Chinese firms, up from 15 percent in 2004 (Wolf and Cheng 2018).

⁵ Since the end of the Cold War, in the drive to reduce poverty, Western donors have dramatically shifted the focus of their assistance to developing countries from infrastructure to the social sector. The share of social-sector spending grew from 29 percent in the early 1990s to 52 percent in 2002. In Africa the share of infrastructure in sector-allocated official development assistance (ODA) fell from 29 percent in the early 1990s to 19 percent in the period 2002–4 (Ohno 2013)

are considered key issues hindering Africa's integration with the global economy (Gu et al. 2016; Le Pere 2017; Wolf and Cheng 2018). According to Oya (2019), China's engagement has the potential to generate a large number of low-skill jobs, allowing people to move from low-productivity and precarious activities, mainly linked with agriculture, to higher-productivity activities in higher-productivity industries, which have stronger potential to spur economic development and drive economic transformation. In the same vein, African countries expect to gain from better integration in regional and global value chains (Le Pere 2017).

In contrast to this perspective, another side of the debate sees this increasingly close partnership as a threat that could undermine sub-Saharan Africa's (SSA's) prospects for growth and development. In this context, much of the Western media and many Western policy commentaries are dismissive. In 2007 Moisés Naím coined the term "rogue donor" to describe China's "toxic aid" (Naím 2007). Former US secretary of state Hillary Clinton, during a 2011 interview, warned against a new form of colonialism in Africa. In 2018, US secretary of state Rex Tillerson criticised China for using "opaque contracts, predatory practices and corrupt deals that mire nations in debts and undercut their sovereignty"⁶. Often, claims describing China as a neocolonial power are paired with the belief that China supports authoritarian governments (Human Rights Watch 2011). According to some scholars (McCormick 2008; Penhelt 2007), China's policy of non-interference in other countries' internal affairs undermines Western donors' efforts at improving governance and reducing corruption.

Scholars on the academic left stress that the growing engagement of China in Africa has yet to significantly change the long-lasting asymmetrical relationship between Africa and the rest of the world. For some, the present logics could just reproduce many of the North-South pathologies in China-Africa relations (Gallagher and Porzecanski 2010, Rotberg 2013, Taylor 2015, 2017). As Bracking and Harrison (2003) point out, "The current process deepens and intensifies Africa's adverse terms of integration within the global political economy—terms which continue to be characterised by external dominance and socially damaging and extraverted forms of accumulation" (ibid., 9). In the same vein, Taylor (2014) argues that in China-Africa relations, "we are not witnessing auto-development, but rather high growth grounded firmly in the external, with all the vagaries and vulnerabilities that this brings" (ibid., 58). Bergesen (2008), adopting David Harvey's accumulation-by-dispossession thesis,⁷ describes Chinese engagement with Africa as a form of "surgical

⁶ The Diplomat, <https://thediplomat.com/2018/03/tillerson-slams-chinese-financial-practices-in-africa/>. Accessed 1 June 2019.

⁷ David Harvey refers to the persistence of accumulation practices, which Karl Marx described as "primitive" or "original" in relation to the birth of capitalism. Accumulation practices include "the commodification and privatization of land and the forceful eviction of peasant populations; conversion of various forms of property

colonialism that involves a minimum of local disruption, a lack of local multipliers, repatriation of surplus and, eventually, limited sustainability” (ibid., 4).

Along these lines, some scholars consider Chinese engagement in the infrastructure sector to be potentially damaging. Both technological transfer and linkages with local development practices are key. “In theory”, as Corkin (2012, 475) argues, “the infrastructure sector should be able to foster production linkages . . . given the lower entry skills threshold. Furthermore, according to global value chains theory, companies operating internationally should eventually look to localise and develop local linkages in order to out-source their no-core competencies”. However, several authors (Le Pere 2015; Corkin 2012) describe China’s supply chains and procurement strategies in Africa as strongly based on the so-called vertical-integration formula, in which all inputs (labour, management, project design, technology, and materials) are Chinese, with no or very little local involvement. Specifically, Mohan (2013) argues that China’s supply chains and procurement strategies, without any organic domestic base, might limit local linkages and the development of local capacity in its partner countries. In the same way, Dollar (2016, 65) points out that among Africans, there are rising concerns about Chinese firms crowding out African construction companies. Others argue that Africa’s borrowing to finance infrastructure projects might lead to Chinese “debt trap diplomacy”—the idea that China seeks to trap countries to secure its assets or strategic advantages (Krakowska 2017; Zhang and Miller 2017). In the infrastructure sector, corruption, poor working conditions, low quality of work, and low maintenance are also sources of widespread concern among scholars studying China’s presence in the African infrastructure sector (Ezechukwu 2015; Konijn 2014).

This literature proves that among scholars, there is widespread concern about Chinese engagement in Africa in general and its infrastructure sector in particular. In certain cases, they reflect a general scepticism towards China-Africa relations (debt-related issues, geopolitical imperialism); in other cases, they reflect preoccupations about specific infrastructure-sector-related matters, such as vertical-integration practices and lack of local linkages. My research takes Ethiopia as a case study to address these debates. I focus on a specific aspect of Chinese engagement with Africa: Chinese-financed, Chinese-built infrastructure projects. Such projects seem to be the ideal case for exploring the debates about China-Africa relations.

rights (common, collective, state, etc.) into exclusive private property rights; suppression of rights to the commons . . . colonial, neo-colonial and imperial processes of appropriation of assets (including natural resources)” (Harvey 2006, 43).

While Chinese infrastructure provision in Africa has been much larger in magnitude than its FDI in Africa, much of the discussion of China-Africa relations has focused on trade and investment, with infrastructure receiving comparatively less attention. Yet infrastructure projects are central to China-Africa strategic relations. In 2016 alone, the turnover realised by Chinese infrastructure companies in Africa was more than twenty-five times higher (US\$ 5.5 billion) than net overseas Chinese investment in the region (US\$ 239 million) (MOFCOM, 2018; see chapter 5 for elaboration).⁸

The thesis's focus on the infrastructure sector has three additional justifications. Firstly, it is commonly agreed in the literature that adequate provision of infrastructure is an essential ingredient of long-term economic growth and development.⁹ China is a case in point: its continuous increase in economic growth and competitiveness have been supported by a huge development of physical infrastructure; that development was also a key feature of China's stimulus following the Asian financial crisis of 1997 and the global financial crisis of 2008 (Stern et al. 2017).¹⁰ Over time, infrastructure investments provided an opportunity to make China's economy, in particular the manufacturing sector, more competitive, thereby attracting FDI and contributing significantly to China's economic and social development.

Secondly, infrastructure is the central component of the "China-Africa infrastructure plan", formulated at the 6th Ministerial Conference of the Forum on China-Africa Cooperation (FOCAC),¹¹ held in South Africa in December 2015. The plan is part of a comprehensive partnership comprising ten strategic areas: "industrialization, agricultural modernization, infrastructure development, financial cooperation, green development, trade and investment facilitation, poverty reduction, public health, cultural and people-to-people exchanges, and peace and security cooperation" (MOFCOM 2016). According to the plan, "China will step up its mutually-beneficial cooperation with Africa in infrastructure planning, design, construction, operation and maintenance. [China will] support

⁸ The value of completed contracts is published every year in the *China Statistical Yearbook* website in the chapter titled "Economic Cooperation with Foreign Countries or Region". "Overseas contracted projects" refers to projects contracted by Chinese enterprises in the infrastructure sector.

⁹ See French (2014); Rotberg (2015); Slabbert (2012); Shelton and Kabemba (2012).

¹⁰ Financing for infrastructure has been provided largely by the Chinese state, accounting for 85 percent of total investments in 2012 (Wilkins and Zurawski 2014).

¹¹ The Forum on China-Africa Cooperation (FOCAC), established in 2000, is playing a leading role in facilitating cooperation in the China-Africa partnership. The FOCAC is the institutional expression of the relationship between China and Africa. China made its largest commitment at the 6th FOCAC summit, in December 2015, with a US\$ 60 billion package. In the last FOCAC meeting, held in Beijing on 3–4 September 2018, China pledged the same amount.. During the summit the Chinese president, Xi Jinping announced that China and Africa would work together to implement a "China-Africa industrialization plan", a "China-Africa agricultural modernization plan", a "China-Africa infrastructure plan", a "China-Africa green development plan", a "China-Africa trade and investment facilitation plan", a "China-Africa poverty reduction plan", and a "China-Africa public health plan".

Chinese enterprises' active participation in Africa's infrastructure development, particularly in sectors such as railways, roads, regional aviation, ports, electricity and telecommunications, to enhance Africa's capacity for sustainable development" (MOFCOM 2016).

Against this background, understanding Ethiopia is key to understanding more about China-Africa relations in the infrastructure sector. According to official data from the World Bank, Ethiopia's growth rate over the past decade has been one of the highest among low-income countries (averaging 10.9 percent in the period 2004–14) (World Bank 2015). Public infrastructure investment was the key structural driver of that growth. Ethiopia stands out as being among the top 20 percent of countries in terms of rate of growth of infrastructure investments: the public investment rate rose from 5 percent of GDP in the 1990s to 17.5 percent in 2016, the highest rate in Africa (Sennoga et al., 2016).

The provision of infrastructure services, transport (roads, railroads, and air), telecommunication, and energy is integral to Ethiopia's Sustainable Development and Poverty Reduction Programme (SDPRD) and the central focus of efforts to industrialise and structurally transform the country. In adopting the Growth and Transformation Plan I (GTP I, 2010–15) the Ethiopian government stressed the importance of infrastructure for growth and structural transformation, allocating 66 percent of its US\$ 11.4 billion of total investments. The same position was reinforced in the Growth and Transformation Plan II (GTP II, 2015–20), in which the government expressed the significance of the promotion of infrastructure.¹² Against this backdrop, Chinese stakeholders have been greatly involved in Ethiopia's infrastructure sector by building and financing many infrastructure projects. Despite not being rich in natural resources, Ethiopia was the second-greatest beneficiary (after Angola) of China Exim Bank (CHEXIM) financing between 2000 and 2015 (SAIS-CARI).

I focus on Ethiopia not only because of the visible presence of Chinese projects in the country. I also aim to expand the literature by including the so-called African perspective (Mohan and Lampert 2013) in the narrative. It is striking how, in the study of Africa-China relations, the effect and multiplicity of forms of African agency has only been marginally covered.¹³ Africa is often referred to as an inert subject of outside forces with no or very little agency. Pundits and the media present a spectacle of China in the driver's seat, in a relationship in which local agents are passive and complacent about China's abusive practices, assuming China's manipulations or a certain local

¹² As part of its ambitious plan, GTP II aims to nearly double the total length of the roads in the country (up to 220,000 km from the target of 120,000 km defined in GTP I).

¹³ Exceptions are Corkin (2013), Gadzala (2015), Mohan and Lampert (2013), and Procopio (2016) Soulé-Kohndou (2018).

inclination to corruption and rent-seeking. While it would be misguided to reject the assumption of asymmetric relations between Chinese and African actors, a more nuanced understanding of the role of local agents in shaping the partnership is crucial and desirable.

What is often overlooked in the scholarship on China-Africa relations is the “reciprocal dimension”—that is, the mutual interaction and bilateral influence of the actors involved, in contrast to a one-way domination of a passive Africa by a monolithic China. In particular, in analysing China-Ethiopia relations in the infrastructure sector, we should recognise the role of Ethiopian actors in shaping the partnership, analyse how local forces are linked with external forces, and consider the actors, incentives, and power relations at play in this partnership. Specifically, we should include in the analysis the social, political, cultural, and ideological circumstances of this relationship and the involved actors’ power dynamics and agency. The thesis thus seeks to add an important piece to the puzzle of Ethiopia’s interaction with China. It suggests we have reason to adopt a more optimistic interpretation of local actors’ agency in their relationship with their Chinese counterparts.

1.2 Research objectives and questions

China has been the object of widespread criticisms, but many of the objections to Chinese activities, as Arewa (2016) writes, “are fairly astonishing given the history of prior unequal and exploitative relationship between Africa and varied external powers” (ibid., 108). Moreover, China is often presented as a single and homogeneous bloc operating simultaneously in different parts of Africa (Lee 2006; Manning 2006). This way of describing the engagement of China with Africa is misleading; nonetheless, it has led to a great wealth of scholarship (Dreher and Fuchs 2015; Taylor 2017) scrutinising China’s “real” motives and “true” strategic interests. My dissertation follows other studies (Arewa 2016; Kragelund and Carmody 2015; Gu 2009; Mohan et al. 2014) in disaggregating the China-Africa relation into its constituent parts and in reading them in relation to structures and processes within African countries. On this view, it is important to map all Chinese actors and local actors that participate in the development of Chinese-financed, Chinese-implemented projects in Africa. This perspectival shift complicates the picture, but it also helps us to evaluate how and why the interplay between Chinese interests and local interests can lead to more or less positive development synergies in African countries.

At a time in which African countries at both domestic and regional levels are multiplying efforts to access the global value chain and to facilitate intracontinental movement of goods and people through

treaties and cooperation arrangements, the infrastructure sector is an entry point for studying both China's presence and how African actors influence China-Africa relations. After years of low infrastructure investments by Western donors, those in the region are expressing a widespread demand for infrastructure (Grimm 2014). Meanwhile, infrastructure projects are the main object of China's involvement in the continent (Sun 2014). While poor infrastructure is frequently identified as a key constraint on development in many countries, little rigorous evidence has been produced on the impact of infrastructure investments in settings such as Ethiopia. In the context of Ethiopia, where urbanisation and industrialisation are both at low levels, it is particularly important to understand the extent to which infrastructure financing has led to positive development outcomes. Against this background, the expansion of Chinese infrastructure firms in Ethiopia and their possible impact on Ethiopian society as a whole speak to my fundamental research question: to what extent does Chinese penetration in the Ethiopian infrastructure sector contribute to positive development synergies?

Against this background, my dissertation studies the Chinese presence in the Ethiopian infrastructure sector by looking at Chinese-financed, Chinese-built infrastructure projects. In so doing, it deconstructs the ideas of a homogeneous China and of a homogenous and passive African continent. Chinese actors are different and have many, sometimes competing, interests. Actors within African countries often have also contradictory interests. For this reason, I do not take the China-Ethiopia relation as one with two poles, but rather as a constellation of processes, mechanisms, and nodes in which local and Chinese interests may or may not intersect. In doing this, I apply a multilevel framework to describe the motives and mechanisms of Chinese engagement, the agency of local actors, and the outcomes for local development.

To achieve these research objectives, I divide my overarching research question into three specific research questions (SRQs):

SRQ1: What are the drivers of Chinese firms' engagement in the Ethiopian infrastructure sector?

SRQ2: How do Ethiopian actors express their agency in Chinese-financed, Chinese-built infrastructure projects?

SRQ3: To what extent do Chinese infrastructure projects enhance linkages with the local economy and support broader development outcomes?

My specific research questions address the two poles of China-Ethiopia relations by identifying motives and actions on both sides and then explaining how the results of this encounter between the pair's motives and actions play out in Ethiopia. The first question can be understood as a necessary

step to unpack the role of China in Africa. It is an explanatory question that aims to situate Chinese firms within a broader political, economic, and historical trajectory. Understanding the drivers of Chinese firms operating in the Ethiopian infrastructure sector is a preliminary step towards a description of agency distribution among Ethiopian state and nonstate actors. The second question inspires a description of how Ethiopian state and nonstate actors operate vis-à-vis Chinese stakeholders. This question is both theoretical and explanatory. It conceptualises African agency as the capacity of a set of different actors that operate within more or less stringent structures and contextual preconditions, and it motivates an explanation of the ways through which Ethiopian actors express their agency in a recognisable way. The third question is empirical. The study of Chinese-financed, Chinese-built infrastructure projects aims to generate new evidence about development linkages in Ethiopia-China relations. Development linkages are understood here as not only infrastructure linkages—that is, the construction of roads, railways, water infrastructures, communication infrastructures, and power grids—but also economic linkages, including forward and backward employment linkages, technological transfer, transfer of know-how, linkages with the manufacturing sector, and outsourcing practices with local enterprises.¹⁴ Taken together, my three specific research questions inform an explanation of the ways through which Chinese stakeholders and Ethiopian actors interact with one another, and they inform an assessment of the results of such interactions. In order to address these questions, this thesis will apply a new conceptual framework, the Global Infrastructure Network (GIN). The GIN was created by bringing together concepts from a range of disciplines and drawing from Global Production Network (GPN) theory, agency theory, and linkage theory. These theories reflect the key dimensions that frame the research.

1.3 Research contribution

By taking the Ethiopian infrastructure sector as a case study, this dissertation contributes to the theorisation of Chinese engagement in the African infrastructure sector and contributes to different interconnected debates (about Chinese involvement in the Ethiopian infrastructure sector, the presence of Chinese firms in Africa, African agency, and the development linkages associated with Chinese engagement in the infrastructure sector in Africa) in the literature on China-Africa relations.

¹⁴ For an in-depth discussion about the definition of economic linkages see section 2.1.3.

Theorisation of Chinese engagement in the African infrastructure sector

This dissertation provides a new theoretical concept, the Global Infrastructure Network, to study Chinese-financed and Chinese-built infrastructure projects within the context of contemporary Africa-China relations. The GIN is a distinctive application of the widely studied GPN to the infrastructure sector. Besides making that application, this dissertation brings into the GPN framework a refined conception of agency and of linkage theory. The result is a relational framework in which different state and nonstate actors interact in negotiations at different levels—macro (national level and beyond), meso (infrastructure sector), and micro (infrastructure firms). Studying such negotiations can make sense of different perceived self-interests and the economic and political processes at several geographical levels, and it has the potential to connect the study of domestic market dynamics within China with the study of domestic market dynamics within Ethiopia by scrutinising the potential of Chinese infrastructure projects to generate positive development synergies and drive favourable economic outcomes.

Chinese economic involvement in Africa

My dissertation adds to the literature on China's increasing economic involvement in Africa, looking at the rising dominance of Chinese firms in Ethiopia and exploring the drivers of Chinese firms' engagement in the country's infrastructure sector. In particular, it confirms that Chinese banks and state actors have crafted normative and financial conditions to support the expansion of Chinese firms in Africa. Yet it also demonstrates that the notion of China as a coherent and assertive monolith and the idea of an overarching foreign policy interest linked to China's political, strategic, and security concerns should be problematised. It is true that Chinese companies have had the support of the Chinese state in entering the country, but it is also true that a state-centred perspective explains just a part of Chinese success in Ethiopia. Specifically, my dissertation demonstrates that after several years in business in Ethiopia, Chinese firms are gaining more and more room for manoeuvring. It also proves that an increasingly large number of SMEs and individual entrepreneurs are operating beyond the Chinese government's control and following self-interested commercial objectives.

African agency

According to an increasingly large body of literature on China's presence in Africa, local actors influence Chinese internationalisation strategies. My dissertation confirms this literature. It demonstrates that several Ethiopian actors influence their relations with Chinese actors at different stages of infrastructure projects. It also shows that agency is not equally distributed across Ethiopian actors. The ability of Ethiopian actors to obtain results depends on their position in a network of reciprocal relationships and, chiefly, on the presence of adequate political and economic structures. Specifically, I demonstrate that federal officials extract concessions from Chinese stakeholders by prioritising the repayment of loans from other lenders while regularly delaying repayment of Chinese loans. Regional officials defend local interests through vetoes or delays in activating otherwise-agreed projects. Workers have been able to gain better workplace conditions through on-site negotiations with Chinese business representatives. Ethiopian private firms have started cooperating with one another to push for reform to an otherwise very unfavourable economic environment.

Development linkages of Chinese engagement with the infrastructure sector in Africa

My dissertation provides new evidence to evaluate the impact of Chinese-built and Chinese-financed infrastructure on development outcomes. While the literature on China-Ethiopia trade and investment is quite extensive, the literature on infrastructure is largely absent from the latest accounts of Ethiopia's development and is largely speculative. As one of the first attempts to apply the GPN framework to the infrastructure sector and the first one to do so in the Ethiopian context, this dissertation shows that Chinese companies behave like other transnational companies operating in the same sector. It also demonstrates that, despite the persistent lack of regulations supporting local firms and workers, Chinese companies are increasingly integrated with the local economy and have contributed to the creation of employment opportunities, technology transfer, know-how dissemination, and economic diversification.

1.4 Structure of the thesis

The thesis is divided into eight chapters. Chapter 2 situates the study within the theoretical debate and presents the theoretical and conceptual framework for understanding and analysing China's engagement in the African infrastructure sector. In section 2 I discuss the reasoning behind my methodological choices underpinning the study. This is followed by a discussion on how I selected

my case study, how I collected and analysed my data, the challenges I encountered during the fieldwork, and issues related to research ethics.

Chapter 3 focuses on the core aspects of China's outward engagement, from the reform period until today. In section 1, I highlight the importance of disaggregating the different Chinese actors and the tensions between market and political objectives in China's external engagement. I then frame the chapter within the broader discourse on the restructuring process by inquiring into the evolution of state-business relations, and I scrutinise how Chinese businesses' evolution into hybrid state/private actors has influenced internationalisation and China's going-out strategy. In section 2, I analyse the political side of this tension, assessing the bureaucratic aspect of China's outward engagement. Here I pay special attention to the actors and modalities involved in structuring loan finance and I clarify how the public-entrepreneurship approach of the Chinese state still guides and influences Chinese business actors through financial and political support.

The fourth chapter shifts the focus to Ethiopia. When analysing the dynamics of Sino-African relations, most scholarship fails to consider the identity of the actors at the different state levels, how their choices are influenced, and what interests, resources, and structures determine the modalities of African actions in response to the Chinese presence. This is important as Chinese actors respond to local political and economic conditions and as the host country (Ethiopia) plays an important part in shaping the relationships among the actors. The first section of chapter 6 thus focuses on unpacking the distinctive features of the Ethiopian developmental process and scrutinising the underlying interests of, pressures on, and constraints on the Ethiopian political class. The chapter then traces the history of China-Ethiopia relations and suggests ways in which the historical narrative has influenced today's interactions. The third and final section of the chapter is a fine-grained analysis of the infrastructure sector, analysing its distinctive features and the factors explaining the growing dominance of Chinese companies in the power, telecommunication, transportation, and water sectors.

Chapter 5 responds to the first subquestion, which concerns the drivers of Chinese engagement in the Ethiopian infrastructure sector. By elaborating on the macroeconomic context, in section 2 I offer a macrolevel quantitative analysis of Sino-Ethiopian economic engagement by analysing the bilateral trade and investment relationships and portraying the dynamics of China's development financing in the country during the last decade. Following this overview, I consider the factors explaining the recent increase of Chinese firms' engagement in the country, differentiating them into institutional and structural push and pull factors. Through this analysis I examine whether Chinese companies

respond primarily to political and geostrategic interests, whether the engagement is best explained as a market process, or whether both are true.

In chapter 6 I analyse agency distribution across Chinese and Ethiopian actors participating in the negotiation and implementation of infrastructure projects. After mapping all Chinese and Ethiopian actors directly involved in these projects, the chapter goes into the modalities of Chinese financing in Ethiopia in more depth by evaluating ways in which different Ethiopian actors engage, negotiate with, accommodate, and contest Chinese actors in the latter's involvement in the country. In particular, through the loan-agreement mechanisms, I assess the ownership and agency of the Ethiopian ruling- elite coalition vis-à-vis the Chinese actors. In addition to exploring macro intergovernmental connections, I scrutinise the implementation mechanisms and the micropolitics of everyday activities with the aim of assessing how the decisions made at the top are leveraged at a lower level of bureaucracy and how the conditions of the Sino-Ethiopian partnership are shaped and adjusted through interactions with broader social forces such as workers and local businesses.

In chapter 7, I turn to Chinese infrastructure projects in Ethiopia's power, telecommunication, and transportation subsectors and explore the behaviours of Chinese infrastructure firms at the micro level through a critical and systematic analysis of development linkages. Through a firm-level survey, the chapter analyses the ways different Chinese infrastructure companies incorporate their operations into wider strategies of corporate development, and it explores how these strategies are impacting local employment, local companies, technological transfer, and skills development. Through this framework I assess how both public and private Chinese companies are evolving and adapting over time to the host country and local contingencies.

The concluding chapter summarises the thesis's findings and draws final conclusions.

CHAPTER EIGHT—CONCLUSION

8.1 Contribution of the thesis

This thesis opened with a puzzle of two countries, named A and B, in a scenario in which country A (Ethiopia) is expanding and developing its infrastructure with the hope of unlocking its development potential and country B (China) is increasingly engaging in the infrastructure sector of country A through a large pool of financing, inputs, and technically advanced construction companies. Then I posed the central research question: to what extent does Chinese penetration in the Ethiopian infrastructure sector contribute to positive development synergies? I followed that question with three related sub-questions: What are the drivers of Chinese firms' engagement in the Ethiopian infrastructure sector? How do Ethiopian actors express their agency in Chinese-financed, Chinese-built infrastructure projects? To what extent do Chinese infrastructure projects enhance linkages with the local economy and support broader development outcomes?

The purpose of this concluding chapter is to review the answers provided through the thesis, to draw implications for Ethiopia's development, and to reflect on their applicability beyond Ethiopia to the broader African context. My exploration has led me to draw several broad conclusions, often at odds with the conventional wisdom that informs China-Africa scholarship.

The GIN as a theoretical tool

This study contributes to ongoing attempts (Fei 2020; Wethal 2017, Corkin 2012, Foster and Graham 2017) to apply the GPN to the infrastructure sector. To do so, I presented an application of the GPN to the infrastructure sector and brought in linkage theory and a conceptualisation of agency. The result of this combination is the GIN framework.

The GIN framework offers insights to rethink the widespread belief that infrastructure projects are distinctly local phenomena. By integrating them into a broad relational framework where actors are at the centre, it is possible to see construction projects as outcomes of different economic and political interactions that, from negotiation and conception to construction and maintenance, occur at different *macro* (national level and beyond), *meso* (infrastructure sector), *micro* (infrastructure firms) levels. In order to develop a more fine-grained conceptualisation of what agents are capable of doing, I added a definition of agency to the standard framework. Further, I combined these insights with linkages

theory, providing guidance in exploring the potential of Chinese finance, Chinese-built infrastructure projects beyond economic growth into development outcomes linked to localisation, technological and know-how transfer and linkages with the manufacturing sector.

This analytical framework can thus account for the various actors, formal and informal institutions, and norms involved in the daily interaction between Chinese actors and Ethiopian actors inside and outside Ethiopia, making sense of the social, economic, and political processes involved at every geographical level. Such an approach helps us also to identify actors' perceived self-interest and to understand both how they negotiate and rethink that interest and where, when, and how they exercise their agency. Finally, it addresses the central actors—namely, firms—and their potential to develop positive economic linkages to host economies, given certain local preconditions. This framework, thus, encourages a multifaceted and nuanced exploration of the ways international actors playing in the infrastructure sector impact the particular political economy of a host country.

In an industry marked by close economic cooperation between China and Ethiopia, it is important to understand how state actors on both sides contribute to the strengthening and stability of economic cooperation. But it is also imperative to grasp whether nonstate actors, on both the Chinese and Ethiopian sides, behave autonomously or align with broader government strategies. The available frameworks, which tend to emphasise either activism of Chinese firms or the control of states over development processes and forms of economic cooperation, do not acknowledge the involvement of Ethiopian state and nonstate actors in shaping the operations of Chinese companies in the country and in influencing development outcomes. It is against this backdrop that my reinterpretation of the GPN framework can help one get a better picture of Chinese engagement in the Ethiopian infrastructure sector. It helps one to understand to what extent and in what ways Chinese firms are connected with their home base. Meanwhile, with Chinese companies performing a dominant role in the market, the GIN framework can capture how local firms and workers actively work to entertain relationships with Chinese counterparts and to push the Ethiopian state to work to regulate foreign activities. Moreover, in a country such as Ethiopia, where the federal government controls key national projects, the GIN framework can identify discrepancies between the different levels of governance and determine how consistency or divergences between the actions of different state actors operating at different levels can impact the implementation of infrastructure projects.

The GIN framework shows that infrastructure projects are also the results of negotiations with host-country state and nonstate actors. The GIN provides a conceptual account of the interconnected negotiations around the design, implementation, and management of an infrastructure project, and it conceptualises the limited range of possibilities within which host-country state and nonstate actors

can construct and negotiate their perceived self-interest. By doing so, the GIN framework can also provide a more accurate evaluation of the development outcomes of infrastructure projects. The GIN framework deconstructs infrastructure projects into several negotiations between state actors, between nonstate actors, and between state and nonstate actors. In this way, it provides a conceptual approach to describe which factors shape the impact of the Chinese presence at the macroeconomic level, but it also provides a conceptual framework to study which factors influence micro-level interactions between local firms and Chinese firms, to study the interactions between Chinese firms and local workers, and to study how these interactions connect with the result of negotiations at higher levels of decision making.

Chinese firms' internationalisation in Ethiopia: who, how, and why?

Chapter 4 explored the drivers of the growing engagement of Chinese firms in the Ethiopian construction market. In this chapter, I problematised the notion of China as a coherent and assertive monolith and the idea of an overarching foreign policy interest linked to China's political, strategic, and security concerns. To do this, I began by analysing the factors behind the substantial increase in China's market share of Ethiopian infrastructure development and found that the expansion of large, medium, and small companies in the Ethiopian infrastructure sector can be understood in three interconnected ways. First, the Chinese economy's readjustment has been characterised by domestic market saturation, escalating competition, and overcapacity. Faced with these pressing challenges, the Chinese government, through its ministries and banks, has incentivised Chinese companies to internationalise with the principal aim of supporting the types of companies and sectors that fit strategically with Beijing's vision of modernisation. Chinese banks and state actors have created normative and financial conditions to support the expansion of Chinese firms, thereby lowering the costs of working in risky settings, facilitating market access, and ensuring integration in the production network. Through such contributions, Chinese companies have found a fast lane into the country, thanks in part to their competitive advantage and their link to capital, technology, and skills.

However, China's success in the Ethiopian infrastructure sector cannot be explained solely from a state-centred perspective. The attractiveness of a stable political environment and of a recipient country commitment to invest heavily in the country's infrastructure as part of its development strategy played an important role. After several years in business in Ethiopia, Chinese firms have sought to expand market share and increase profits. They are following their commercial objective, winning contractors from other financing institutions, and harshly competing among themselves and with their foreign competitors, often beyond Beijing's control.

The residual control of the central government over Chinese firms in Ethiopia is further expressed by the strong presence of a large set of SMEs and individual entrepreneurs that operate beyond the Chinese government's control and follow self-interested commercial objectives. Against the idea of a highly coordinated strategy, the Ethiopian case demonstrates that Chinese firms' engagement in the infrastructure sector is increasingly diverse and diffuse: from centrally and provincially owned SOEs, to private firms of every size, to the growing number of individual entrepreneurs, each of them seeking different opportunities. The capacity of the Chinese government to control these firms' actions is limited, and the emerging fracture between the commercial objective of the companies and the political objectives of Beijing is likely to widen in the years to come.

Ethiopian agency: noncompliance, cooperation, and contestation

In chapter 6, I studied the negotiations between Ethiopian actors and Chinese actors in a context, the infrastructure sector, in which the Chinese actors seem to have an advantage and strong bargaining power. The chapter examined how Ethiopian government elites, regional bureaucrats, local firms, and workers respond to the increasingly large presence of Chinese stakeholders in the country. In seeking to understand the role Ethiopian actors play in relation to Chinese actors, I countered the argument of a one-way domination of a monolithic China over a passive Africa. I demonstrated that a plethora of Ethiopian actors can influence their relations with their Chinese counterparts before, during, and after the implementation of infrastructure projects; this prove that the agency Ethiopian actors express in their negotiations with Chinese counterparts is critical and deserves to be taken into account. These observations echo the growing literature on African agency. Scholars have demonstrated that in other countries, local actors influence Chinese internationalisation strategies. However, my study shows that African agency should not be taken to be black-or-white and that it is incorrect to measure agency by the immediate results that each agent is able to obtain. The ability of Ethiopian actors to obtain immediate and expected results depends on their position in the network and by the presence or absence of appropriate political and economic structures. For this reason, it is important to stress that Ethiopian actors express their agency and that such expressions of agency are critical to create positive development patterns and dynamics.

It is also important to remember that Ethiopian actors do not express agency without constraints. Therefore, when we speak of African agency, we must be sensitive to the context in which the different agents operate. Federal officials have been able to keep their ownership of infrastructure projects and to prioritise the repayment of loans from other lenders while regularly delaying repayment of Chinese loans in order to extract concessions from China. By vetoing and delaying otherwise-agreed projects, regional officials have been able to defend the interests of local

communities. Meanwhile, workers, who remain very unprotected and have insufficient rights and weak unions, are able to ensure better workplace conditions by negotiating with their Chinese counterparts on the construction site. My study demonstrated that among Ethiopian actors (officials, regional bureaucrats, private firms, and workers), private firms have tried to cooperate with one another in order to pressure Ethiopian institutions, despite the very unfavourable economic, legal, and political environment.

Development linkages in the infrastructure sector: are Chinese firms so bad?

Chapter 7 examined the extent to which Chinese entry into the Ethiopian infrastructure sector has contributed to positive development synergies. In doing this, I challenged the assumption in the China-Africa scholarship that frames the Chinese infrastructure projects as secured enclaves. In the Ethiopian case, that assumption is not accurate, given the diversity of Chinese construction firms operating in the country. As a result, I argue, it is important to identify the characteristics of such firms as well as the circumstances in which they operate. Despite the widespread adoption of vertical integration, the lack of regulations supporting local firms and workers, and weak local capabilities, several Chinese companies in the Ethiopian infrastructure sector are increasingly integrated with the local economy. Such group of companies are contributing to the creation of new employment opportunities, to the acceleration of know-how and technology transfer, and to economic diversification through linkages with the manufacturing sector.

In particular, the claim about limited job creation is unfounded as the ratio of Chinese labour to Ethiopian labour has decreased over time and as the ratio for Chinese companies is similar to that for other transnational companies working in the sector. While Chinese firms are keeping control of their intellectual property, they have transferred technology and know-how. Moreover, linkage formation with the manufacturing sector has helped diversify the economy. The tendency to privilege turnkey projects and the style of Chinese management have created limited subcontracting opportunities for Ethiopian local companies. However, China's mere presence has put pressure on competing domestic firms to learn and be more productive. Overall, despite some peculiarities, Chinese companies align significantly with other transnational companies operating in the sector; they share interests, agendas, and *modi operandi*. Yet, to fully understand China-Ethiopia relations and China-Africa relations more generally, we must look at the way local government actors respond to the presence of Chinese companies in their country. In an environment with very few policy instruments to regulate the operations of foreign firms, such synergies are not structural or consistent across all firms or projects.

8.2 Final thoughts and implications of research findings

The findings of my research support broader conclusions on drivers, modalities and local development linkages within the context of China-Africa relations. Future research on infrastructure deals between African and Chinese stakeholders could benefit from the GIN framework. While available conceptual instruments are often focused on single aspects of China-Africa relations, my theoretical framework can map actors, power relations, negotiations and impacts. In this way, it is easier to detect key junctures and actors in the process leading to the implementation of infrastructure projects.

My findings also contribute to the study of African agency with new evidence. A focus on African agency is crucial because it demonstrates how different local actors are able to shape the outcomes of their encounter with donors and non-African powers. In the Ethiopian infrastructure sector, I have identified four classes of actors and three types of agency: agency through noncompliance (officials and regional bureaucrats), agency through cooperation (private firms), and agency through opposition (workers). Over the years, all Ethiopian state and nonstate actors have progressively pursued their perceived interests and adapted or responded to an increasing Chinese presence. A common feature across Ethiopian actors is that they have been able to identify critical junctures at which their agency can be more effective.

Furthermore, my study of modalities offers a term of comparison that can help scholars to study infrastructure deals in other African countries. As the Ethiopian case demonstrates, development linkages also depend on the capacity and willingness of African legislators to create adequate conditions for the parallel development of local businesses and to establish a system of rights that can empower workers in their negotiations with foreign companies. However, in order to keep up the pace of its development agenda, the Ethiopian government has not focused on a strategy that includes all actors. As a result, the benefits and burdens of China's presence have been unequally distributed. Yet, while the China option is not the silver bullet to resolve all African problems, it has helped to reduce the infrastructure gap, and it has contributed to positive local development outcomes. Whether or not Chinese financial backing will be sustainable in the long run remains an open question. Whether or not the construction of infrastructure projects will bring prosperity to the masses is also an open question. In responding to this challenge, what matters the most is the proactiveness of African governments to balance between the opportunities China can provide and the need to ensure a sustainable and inclusive development.

Annex I. List of interviews

Code	Place	Date	Position	Language
C1	Beijing, China	August 2017	Senior Staff, World Bank Manager Transport and ICT	English
C2	Beijing, China	August 2017	Senior Fellow, Brooking Institute Thorton China Center	English
C3	Beijing, China	August 2017	Head Economic Unit, Asian Development Bank	English
C4	Beijing, China	August 2017	Professor, Peking University	English
C5	Beijing, China	August 2017	Professor, Tsinghua University	English
C6	Beijing, China	August 2017	Professor, Remin University	English
C7	Beijing, China	August 2017	Head of Political Press and Information Section, Asian Development Bank	English
C8	Beijing, China	September 2017	Professor, Chinese Academy of Social Sciences	English
C9	Beijing, China	September 2017	Deputy Head of Mission, Embassy of Ethiopia in China	English
E1	Addis Ababa, Ethiopia	July 2018	Manager, Eastern Industrial Zone	English

E2	Addis Ababa, Ethiopia	July 2018	Assistant Manager, Eastern Industrial Zone	English
E3	Addis Ababa, Ethiopia	July 2018	Director, Ethiopia Ministry of Construction	English
E4	Addis Ababa, Ethiopia	July 2018	Journalist, Chinese Newspaper	English
E5	Addis Ababa, Ethiopia	August 2018	Professor, Addis Ababa University	English
E6	Addis Ababa, Ethiopia	August 2018	Professor, Addis Ababa University	English
E7	Addis Ababa, Ethiopia	September 2018	Professor, Addis Ababa University	English
E8	Addis Ababa, Ethiopia	September 2018	Director, (MoFEC) Multilateral Organization Department	English
E9	Addis Ababa, Ethiopia	September 2018	Director, (MoFEC) Debt Management Directorate	English
E10	Addis Ababa, Ethiopia	September 2018	Deputy Director POWERCHINA	English
E11	Addis Ababa, Ethiopia	September 2018	Advisor, Ethiopian Ministry of Culture and Tourism	English
E12	Addis Ababa, Ethiopia	September 2018	Legal Consultant for Chinese companies in Ethiopia	English
E13	Addis Ababa, Ethiopia	September 2018	Director, UNECA Capacity Development Division	English

E14	Addis Ababa, Ethiopia	September 2018	Consultant, China-Ethiopia relations	English
E15	Addis Ababa, Ethiopia	September 2018	Expert, European Union	English
E16	Addis Ababa, Ethiopia	September 2018	Analyst, Ethiopian Investment Commission	English
E17	Addis Ababa, Ethiopia	September 2018	Director, Ethio Telecom	English
E18	Addis Ababa, Ethiopia	September 2018	Expert, ILO	English
E19	Addis Ababa, Ethiopia	September 2018	Director, (MoFEC) China-Ethiopia Department	English
E20	Addis Ababa, Ethiopia	September 2018	Expert, Ethiopian State Ministry of Foreign Affairs	English
E21	Addis Ababa, Ethiopia	September 2018	Director, Ethiopian Electric Utility	English
E22	Addis Ababa, Ethiopia	September 2018	Infrastructure Expert, World Bank	English
E23	Addis Ababa, Ethiopia	September 2018	Director, Ministry of Labour and social affairs (Employment service promotion directorate)	English
E24	Addis Ababa, Ethiopia	September 2018	Director, Ministry of Labour and social affairs (Expatriate service promotion team leader)	English

E25	Addis Ababa, Ethiopia	September 2018	Director, Ministry of Foreign Affairs (Asia and Oceania)	English
E26	Addis Ababa, Ethiopia	September 2018	Programme Manager, Ethio telecom Strategy and Programme/Project Management	English
E27	Addis Ababa, Ethiopia	September 2018	Account Manager, Huawei Technology Ethiopia	English
E28	Addis Ababa, Ethiopia	September 2018	Deputy Managing Director, East Africa CGCOC Group Co.	Chinese
E29	Addis Ababa, Ethiopia	September 2018	Marketing Supervisor, CGCOC Group Co.	Chinese
E30	Addis Ababa, Ethiopia	September 2018	Senior staff, Ministry of Labour and social affairs (Expatriate service promotion team leader)	English
E31	Addis Ababa, Ethiopia	September 2018	Director General, MoFEC Public Private Partnership Department	English
E32	Addis Ababa, Ethiopia	September 2018	Deputy General Manager, CCECC Ethiopia Construction PLC	English
E33	Addis Ababa, Ethiopia	September 2018	Senior staff, Chinese Embassy in Ethiopia	English
E34	Addis Ababa, Ethiopia	October 2018	Expert,	English

			Industrialization and Infrastructure Section UNECA	
E35	Addis Ababa, Ethiopia	October 2018	Deputy Director general, Ethiopian Roads Authority Planning and ICT Department	English
E36	Addis Ababa, Ethiopia	October 2018	Team Leader, Monitoring and evaluation Ethiopian Roads Authority	English
E37	Addis Ababa, Ethiopia	October 2018	Senior Staff, Plan & Programme Directorate Ethiopian Roads Authority	English
E38	Addis Ababa, Ethiopia	October 2018	Regional Trade Advisor, African Union	English
E39	Addis Ababa, Ethiopia	October 2018	General Manager, State Grid Co. Ethiopia Branch	English
E40	Addis Ababa, Ethiopia	October 2018	Business Manager, State Grid Co. Ethiopia Branch	English
E41	Addis Ababa, Ethiopia	October 2018	Country Manager, China Communications Construction Company Ltd.	English
E42	Addis Ababa, Ethiopia	October 2018	Marketing Manager, China Gezhouba Group Co., Ltd. Ethiopia Branch	English

E43	Addis Ababa, Ethiopia	October 2018	Human Resources Manager, China Gezhouba Group Co., LTD. Ethiopia Branch	Ethiopian
E44	Addis Ababa, Ethiopia	October 2018	Chief Executive Officer, ZTE Limited Ethiopian Branch	English
E45	Addis Ababa, Ethiopia	October 2018	Public Relations Manager, ZTE Limited Ethiopian Branch	English
E46	Addis Ababa, Ethiopia	October 2018	General Manager. SWS Construction	Chinese
E47	Addis Ababa, Ethiopia	October 2018	Executive Officer, Transmission, substantial operation and maintenance Ethiopia Electric Power	English
E48	Addis Ababa, Ethiopia	October 2018	Deputy CEO, Ethiopian Railways Corporation	English
E49	Addis Ababa, Ethiopia	October 2018	Manager, Salini Impregilo Ethiopia	English
E50	Addis Ababa, Ethiopia	October 2018	Economist, IMF	English
E51	Addis Ababa, Ethiopia	October 2018	CEO, Flinston Engineering	English
E52	Addis Ababa, Ethiopia	October 2018	Deputy General Manager, Midroc Techn. Ethiopia	English
E53	Addis Ababa, Ethiopia	October 2018	Manager, Planning & monitoring Department	English

			Rama Construction	
E54	Addis Ababa, Ethiopia	October 2018	CFO, Sur corporation	English
E55	Addis Ababa, Ethiopia	October 2018	Deputy General Manager, Yotek construction PLC	English
E56	Addis Ababa, Ethiopia	October 2018	General manager, Sunshine construction Group	English
E57	Addis Ababa, Ethiopia	October 2018	General manager, Afro-Tsion Construction Plc.	English
E58	Addis Ababa, Ethiopia	October 2018	Chief Managing Director, Tekleberhan Amabaye construction PLC	English
E59	Addis Ababa, Ethiopia	October 2018	General Manager Bright Construction	English
E60	Addis Ababa, Ethiopia	October 2018	Senior Manager, Satcon Construction PLC	English
E61	Addis Ababa, Ethiopia	October 2018	General Manager, Jiangxi Zhongmei.co Ltd	English
E62	Addis Ababa, Ethiopia	October 2018	President, Construction Contractors Associations of Ethiopia	English
E63	Addis Ababa, Ethiopia	October 2018	Human Resources Manager, CCECC	English
E64	Addis Ababa, Ethiopia	October 2018	Human Resources Manager,	English

			Dongfang Electric Corporation Limited	
E65	Addis Ababa, Ethiopia	October 2018	Human Resources Manager, Salini Impregilo Ethiopia	English
E66	Addis Ababa, Ethiopia	October 2018	Senior Manager, CGCOC Road	Ethiopian
E67	Addis Ababa, Ethiopia	October 2018	Senior Staff, Yapi merkezi	Ethiopian
E68	Addis Ababa, Ethiopia	October 2018	Financial Manager, Grid solutions SAS	Ethiopian
E69	Addis Ababa, Ethiopia	October 2018	Finance Manager, Xinjiang Power Transmission and Transformation Co.	Ethiopian
E70	Addis Ababa, Ethiopia	October 2018	Legal Advisor, China Electric Power Equipment and Technology Co., Ltd.	Ethiopian
E71	Addis Ababa, Ethiopia	October 2018	Logistic Manager, NCC17 Construction Co.	Ethiopian
E72	Addis Ababa, Ethiopia	October 2018	Project Manager, Chinese Company CGCOC - Water	Ethiopian
E73	Addis Ababa, Ethiopia	October 2018	Senior Staff, Siemens	English
E74	Addis Ababa, Ethiopia	October 2018	Senior Staff, Ericsson	English
E75	Addis Ababa, Ethiopia	October 2018	Senior Official, MoFEC China-Ethiopia Department	English
E76	Addis Ababa, Ethiopia	October 2018	Data Management Expert,	English

			Ethiopian Investment Commission	
E77	Addis Ababa, Ethiopia	October 2018	Senior Official, Oromia Regional government	English
E78	Addis Ababa, Ethiopia	October 2018	Assistant Manager, Jiangsu Baoli International Construction	English
S1	Skype	August 2018	China-Ethiopia Expert, Adelaide University	English
S2	Skype	August 2018	Telecommunication Specialist, Kent University	English
S3	Skype	September 2018	Researcher, Overseas Development Institute (ODI)	English
S4	Skype	October 2018	Expert Environment and infrastructure, European Union	English

Annex II. List of cooperation agreements between China and Ethiopia

Evidence shows that approximately sixty bilateral cooperation agreements have been signed between China and Ethiopia. Some of the most important are listed below:

Sino-Ethiopian Agreement for Economic and Technological Cooperation (1971, 1988 and 2002);

Sino-Ethiopian Trade Agreement (1971, 1976);

Sino-Ethiopian Trade Protocol (1984, 1986, 1988);

Sino-Ethiopian Agreement for Mutual Promotion and Protection of Investment (1988);

Sino-Ethiopian Agreement for Trade, Economic and Technological Cooperation (1996);

Agreement for Investment Protection and Promotion (1998);

Agreement for Economic and Technological Cooperation (2002);

Agreement for Information Release (2003);

Agreement to eliminate double taxation and others (May 2009);

The Memorandum of Understanding signed between the Communist Party and the EPRDF (2010);

The agreement to provide Chinese-language teaching centres for Addis Ababa, Hawassa and Mekelle Universities (2011);

Investment Expansion and Protection Tax Agreement (2013);

Air service agreement (2013);

A Joint Visa Removal Agreement for Travelers with a Diplomatic and Services Passport (2014);

Approved Destination Status Agreement, under which Chinese citizens can travel in organised group tours to countries the government has approved (2014);

The 16th Economic Development Agreements (2015);

The Memorandum of Understanding signed between the two Ministry of Defense (2016);

Agreement to strengthen the Cooperation between the EPRDF and the Chinese Communist Party (2016);

Agreement on bilateral economic cooperation, technology and human resources development (2017).

Source: Chinese Embassy in Ethiopia.

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