The EU as a Strategic Partner to the AU on Connectivity, Investment and Digital Governance

Policy Brief

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INTRODUCTION

As the European Union and the African Union deepen their partnership through the commitments made in the Luanda Summit, the Joint Vision 2030, and the AU's Agenda 2063, the upcoming negotiations on the EU's 2028–2034 Multiannual Financial Framework (MFF) provide a timely opportunity to **turn these political commitments into concrete action**. Despite growing investment in digital infrastructure, **nearly 900 million Africans don't have access to networks, with the landlocked countries facing even deeper challenges because of their dependence on coastal neighbours for international connectivity**. This policy brief argues that **the EU can become the AU's leading strategic partner in digital transformation** by supporting an integrated approach that combines submarine cables, terrestrial fibre networks, and satellite connectivity. By aligning infrastructure, investment, and digital governance with African priorities, **the EU could help close the continent's gap while developing a partnership based on shared objectives, mutual benefit, and long-term resilience.**

FINDINGS

Infrastructure

GSMA's latest report identified that **among the 416 million people using mobile internet in Africa in 2024, almost 75% of the population remain unconnected**. Africa has seen a rapid evolution of its digital infrastructures **mainly through the implementation of submarine cables** allowing more citizens to have access to network and internet. However **submarine cables alone are insufficient**, as landlocked countries lack access to them, creating **energy inequalities**. Therefore, it has to be complemented with terrestrial fibre, that works as the missing links to connect the seaside to central territories, and satellite technologies to help extend the broadband coverage to underserved regions. Moreover, **investment in this sector is important not only for connectivity, but also accessibility**, as 2024 data shows that about **64% of Africans are not using mobile internet even though coverage is available because of high costs**. This policy brief shows that **those three technologies are compatible** and need to be further developed to achieve connectivity goals, and that **the EU is the only strategic actor capable of tackling all of these at once without operating on commercial terms**.

Submarine cables play a backbone role in network connectivity. To strengthen this area, the European Union launched **the MEDUSA project** as an international partnership to link Northern Africa to Southern Europe. It represents its first major digital Global Gateway project, with **€342 millions invested and 7100km of submarine optical fibre cable coverage in the Mediterranean**. This project was born with the help of blended public instruments, including particularly Connecting Europe Facility instrument (CEF Digital), which allowed the infrastructure and telecom operator AFR-IX Telecom to receive funding to implement the project, but also through the help of the European Central Bank who contributed with a €40 million investment grant. Through this initiative, **the EU has become an actor who already takes into consideration the challenges that landlocked countries face.**

Improving cooperation between the two regions would reinforce development for both sides and help tackle directly the backbone of connectivity.

However, **submarine cables remain insufficient by themselves if the objective is to offer a wide broadband access to the African continent**. In order to solve this issue, the EU pairs these initiatives with instruments to **close regional "missing links"**. It does so **through the regional fibre optic backbones initiative, under the Global Gateway**, that focuses on less connected countries in Central-East-Southern Africa. It is set to create a **12,000km of optic-fibre cables to bridge the digital divide of 8 African countries**: the Democratic Republic of Congo, Malawi, Mozambique, Tanzania, Uganda, Zimbabwe, Zambia, and Madagascar. This project doesn't only affect individuals but also schools, hospitals and public institutions, benefiting multiple public sectors in the region. **Funds are operated through EU's €90 million grants, with support from the European Investment Bank and other European financial institutions**.

Cooperation also has high relevance with **the implementation of satellites to breach the infrastructure inequalities in the regions with the most closure**. The **EU's IRIS² project** (Infrastructure for Resilience, Interconnectivity and Security by Satellite) goes beyond territorial backbones with satellite technology **to target not only Europe, but also Africa as a whole**. While territorial and submarine cables offer backbone connectivity, **satellites offer mobile networks with less geographical constraints, offering access to the most secluded places**. This also takes part in a broad 5G development for high speed and internet access. This offers **more strategic autonomy for the EU in spatial-digital infrastructures on the one end and works as a development program to improve broad sectors for both government users and civilians on the other hand**. This puts the EU as a strategic partner with no China or the US equivalent to offer.

Satellites also allow for a better development of 5G, which work as a last-mile rollout to complete the infrastructure chain. However, **its implementation in dead-zones is rarely commercially viable on its own; most private sectors might**

avoid this market as they consider it to be unprofitable. The EU's investments tackle this issue with projects such as the one between EIB Global and Axian Telecom, a panafrican group, that aims to use financial guarantees as **a way to de-risk the telecom market**.

Investment

Investing in a digitalisation project of this magnitude—involving the development of submarine cables, fibre infrastructure and satellite secure connectivity—requires **financing at a scale that exceeds the capacity of Official Development Assistance (ODA)**—defined as government aid that promotes and specifically targets the economic development and welfare of developing countries (OECD)—**alone**. While development aid remains an indispensable source of funds for landlocked African countries—the majority of them categorised as "least developed countries" by the OECD and thus being eligible as prioritary, recipient countries—the Organization for Economic Cooperation and Development has widely recognised that **aid is insufficient to close the huge investment gap present in many regions of Africa**. On top of this, the OECD registered a **historic drop of 23.1% of assistance funds coming from the Development Assistance Committee (DAC)**—of which 22 out of the current 27 EU Member States are part of—from 2024 to 2025.

Considering the crisis that public aid assistance is currently undergoing, as well as the scope and size of the proposed initiative, **both public and private capital would need to be mobilised for this project to be implemented**. The EU has seemed to realize this necessity as well: in the midst of the new framing of the Multiannual Financial Framework (MFF) that will cover the period of 2028 to 2034, the Commission has unveiled its **new Global Europe instrument**. This new mechanism aiming to replace the current NDICI Global Europe promises to, among other objectives, **adopt a more investment-focused stance by promoting blended finance and de-risking private investments through guarantees**. Nonetheless, **the assumption that blended finance alone can unlock sufficient investment alone is highly questionable**. Due to political instability, currency volatility, high levels of corruption and difficult access to the targeted countries, **private investors continue to perceive many of these markets as high-risk ones** (UNDP). In order to attract more commercial capital, the EU should instead adopt a **grant-plus-guarantee model**. Under such an approach, **the EU-backed guarantees would de-risk investment and further promote inclusion on investment plans of particularly fragile economies**.

To maximise effectiveness, **all investment flows should be coordinated by both Team Europe**—bringing together MS, the Commission, the EEAS, and the EIB—**and the Digital4Development (D4D) Hub**—the EU's platform specifically focused on digital cooperation with partner countries—building on existing regional Team Europe Initiatives in East Africa. Such a cooperative approach also **reduces the risk of digital connectivity funds, and landlocked equity in particular, to be left out of the forthcoming MFF negotiations**, as an increased political pressure will contribute to **ring-fence a dedicated digital-connectivity envelope within the Union's external action budget**. This would, in turn, **provide a concrete and measurable contribution to the objectives of EU-AU's Joint Vision 2030**.

Digital governance

In order to establish a credible, trustful and effective partnership in the field of digital governance, the relationship between the EU and the AU must be understood by both parties as one of **equal partners**. The practical application of this approach is quite simple: **the strategy of the EU should be enabling rather than exporting**. In other words, **the support provided by Europe has to follow African-defined rules and frameworks anchored in the Agenda 2063 instead of trying to impose its own templates**, all while **promoting knowledge sharing and the diffusion of technical expertise**. In this sense, it is also important to highlight that **infrastructure financing alone is not a sufficient measure by itself**, and needs from **institution-building, interoperability and digital sovereignty for a correct implementation of a resilient, long-lasting and overall successful project**. This logic not only creates a **fairer ties between both regions**—avoiding the formation of unequal relationships and dependencies, as well as the adoption of a European neocolonialist approach—, but also **makes the EU stand out as a partner with a more respectful and comprehensive, local-based, development focus** than that of other global competitors such as the US and China.

Looking at the current African digital infrastructure, some remarkable progress has recently been made. The adoption of initiatives such as **the AU Data Policy Framework and the AfCFTA Digital Trade Protocol**, and the ongoing work towards a **continental Digital Single Market by 2030**, provide a strong normative and institutional foundation that serves as a reference point for external partners. Once again, following the approach provided by this brief and in view of the advancements coming from the African continent, we suggest that **the EU should align with the existing norms, to build on these foundational agreements rather than to introduce a parallel, competing framework**.

Nevertheless, and despite the aforementioned progress, the main challenge of the AU is to **overcome the obstacles resulting from an uneven, and sometimes unsupervised, implementation**. The Malabo Convention—AU's main legal framework designed to address cybercrime and promote data protection in Africa—remains **the only legally binding continental instrument** on cross-border data flows, and **out of the 55 AU Member States, only 15 have ratified the convention** (Data Protection Africa). The persistent fragmentation of Africa's digital regulatory landscape caused by this implementation gap **severely weakens legal certainty, making cooperation much more difficult**. In this context, **European cooperation is well-placed to help. Supporting implementation, harmonisation and institutional capacity**—tasks that the EU is accustomed to manage in its own territory—**is a field in which the regulatory experience of the EU can provide a great added-value**. However, in order to successfully cooperate in this area—and continuing with our enabling-rather-than-exporting philosophy—we propose, once again, **an approach developed under the existing Team Europe D4D initiative rather than a conditionality-based implementation support**. In short, the goal is to **reinforce and promote African institutions and priorities with the help of European expertise, but**

without imposing European norms that do not take into consideration the preferences of the locals.

POLICY RECOMMENDATIONS

To tackle the issues stated above, this policy brief will propose **a series of recommendations** regarding key aspects of EU-AU cooperation on digital governance.

First, **infrastructures should be addressed simultaneously through the three core technologies which are seen as compatible and sequential together rather than competing**. Programming them through the **Global Gateway** while **prioritizing landlocked countries that currently lack the necessary infrastructures**. The **MEDUSA Submarine cable system** proves that blended public investment can impact digital infrastructure a lot, and other projects can help bridge the connectivity gap. This should go with **deeper terrestrial fibre backbone development and satellites** which are currently insufficient to cover the most secluded areas. These recommendations would be **even more effective if paired with closer cooperation on the energy sector**. Today, Sub-Saharian Africa accounts for over 80% of the global population without electricity. We recommend aligning digital infrastructure planning with energy rollout strategies like the Mission 300 initiative. The projects can also benefit from Digital innovation hubs' support such as Kenya's Team Europe Initiative which connects underserved areas while simultaneously providing digital servicing from schools and health centers.

Secondly, the brief proposes to **create a dedicated digital connectivity envelope in the MFF 2028-2034 specifically for these regions as to prevent digital equity from being displaced or supplanted by competing priorities** like migration or external conflicts. Moreover, **investment in satellites and 5G in landlocked countries is too costly and remains uncertain for investors**. For the Least Developed Countries (LDCs) and fragile states, **blended investment isn't sufficient because investors are often reluctant to enter these markets due to financial fears**. Therefore, **the EU needs to ensure grant and guarantee systems to attract investors in the area, and also to make connectivity affordable for local populations.**

Next, **digital governance should also be framed as a "partnership of equals" with a credible, enabling offer rather than simple rhetorical benefit**. By anchoring the support on the continent's Agenda 2063 as well as other frameworks within Africa, **the EU can present itself as a valuable partner that brings value addition to Africa's regulations rather than introducing its own set of rules**. As such, we shouldn't impose the GDPR and EU AI Act to our partners but instead, t**he D4D Hub can provide the necessary capacity-building in terms of data protection as well as cybersecurity guidelines**. The focus should be on the AU's 2025 work towards a continental Digital Single Market by 2030, and not on governance conditionality.

Finally, **the initiatives should also ensure a co-creation safeguard to make sure ownership doesn't constitute a dispute area between partners**. This addresses the Luanda ownership critiques by proposing that future digital Team Europe initiatives follow priorities from the different partners from the start. The Kenyan Team Europe Initiative proves the feasibility of the model as it successfully aligns digital governance with local objectives like reducing the digital gap and leapfrogging the digital economy through inclusive e-government systems.

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