

Chinese firms and employment dynamics in Angola and Ethiopia

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Key messages:

1. Despite long-standing criticism, **Chinese firms and construction projects in Africa are found to provide substantial contributions to employment creation**, and to have high localisation rates.

2. More than the origin of the job-providing firms, **labour outcomes** (such as wages and benefits, labour relations and opportunities for skills development) **are influenced by the characteristics of workers, firms, the sector or production network, and the host country**.

3. Despite the presence of domestic and foreign firms offering jobs, **the creation of an industrial workforce is a long and uneven process** that does not take place automatically and requires concerted efforts.

This brief sets in context and summarises findings from the DFID-ESRC Growth Research Programme (DEGRP) project '[Industrial Development, Construction and Employment in Africa](#)' (IDCEA). The project examined the employment and labour market effects of Chinese and non-Chinese firms investing in manufacturing and building infrastructure with a focus on Angola and Ethiopia. The research was led by SOAS University of London (UK) in collaboration with Renmin University (Beijing, China), Universidade Agostinho Neto and JMJ Angola (Luanda, Angola), the Ethiopian Economic Policy Research Institute of the Ethiopian Economics Association and the Forum for Social Studies (Addis Ababa, Ethiopia).

What do we know?

With the increase of Chinese outward investment and financing to African countries, both academics and the press have raised more or less veiled concerns about the effects that Chinese activities may have on African labour markets (Lahtinen, 2018; Lee and Shalmon, 2008; Mekonnen, 2015; The Economist, 2014). Three issues are persistently raised about Chinese firms investing and undertaking construction projects in Africa.

The first issue is the claim that Chinese firms do not create local employment, with few jobs going to African workers. Although there is no total estimate of the number of jobs created by Chinese enterprises in Africa, the evidence suggests that job creation does take place, often on a significant scale. The numbers range from a few dozen jobs in small Chinese-run mines in Tanzania (Cerutti et al., 2018), to 9,000 workers employed in a special economic zone in Zambia (Bräutigam and Tang, 2014), to tens of thousands of jobs indirectly created in the cotton sector in Zimbabwe (Blackmore et al., 2018). Investment promotion agencies in several African countries reported that Chinese firms created jobs in the thousands, from 3,000 in Rwanda and Liberia to 69,000 in Nigeria (Shen, 2015).

A corollary to the job creation issue concerns localisation rates, or the shares of local African workers employed by Chinese firms in Africa. There are claims that Chinese firms mostly create jobs for Chinese workers, but again, the evidence available challenges these claims. A survey of over 60 literature sources conducted by Oya and the IDCEA team (2019) revealed localisation rates ranging from 10% to 99%, with a weighted average of 85% African workers in the total workforce. Chinese firms often hire local African workers for the majority of unskilled or low-skilled jobs, keeping managerial and technical positions for Chinese staff (Bräutigam, 2009; Chen et al., 2009; Jayaram et al., 2017; Lampert and Mohan, 2013), and where possible, Chinese companies prefer to employ local staff to save on expensive expatriate salaries and work permits. Chinese companies that have been in a country for a longer time tend to employ more local staff, as they gradually replace their expensive foreign experts with domestic workers (Tang, 2016).

The second commonly raised issue relates to the working conditions of African workers in Chinese firms, often claimed to be exploitative. Some studies report that Chinese firms pay lower wages compared to other firms, or to national averages (Baah and Jauch, 2009; Human Rights Watch, 2011; Tang, 2016), however other studies point to the exact opposite (Akorsu and Cooke, 2011; Bashir, 2015; Fei, 2018). There is some evidence of poor working conditions in Chinese firms (Huang and Rounds and Huang, 2017; Jayaram et al., 2017; Jenkins, 2018; Lee, 2017), but these are not systematic studies, and it is unclear whether this level of scrutiny has been applied to Chinese companies only, or to the entire spectrum of national and foreign firms. Poor working conditions in African labour markets are unfortunately not unusual.

The third issue usually raised is that Chinese firms make very limited contributions to skills development for African workers (Baah and Jauch, 2009). However, some literature shows that Chinese firms are, indeed, engaged in skills development and training (Bashir, 2015; Fei, 2018;

Huang and Rounds, 2017; Jayaram et al., 2017; Shen, 2015; Tang, 2016), although with huge variations between sector and firms.

The challenge with assessing the accuracy of these issues is the scarce evidence available, which is piecemeal and often contradictory. Large-scale, comparative research that considers country and sector characteristics had not been undertaken. This is the gap that the IDCEA research aimed to fill.

The DEGRP research

Aims

The 4-year research project set out to review the existing evidence on employment outcomes of Chinese firms in Africa, focusing on job creation, employment conditions and skills development for African workers employed in Chinese firms. The review confirmed the lack of large-scale, rigorous and comparative evidence. Most previous studies had just focused on small samples of Chinese firms, with no large-scale quantitative evidence and no comparators from other origins. The research team proposed a research design that would provide a comparative analysis looking at sector- and country-specific differences, as well as variations within groups of firms of the same origin. This comparative approach allowed the research to move away from 'methodological nationalism', which assumes the nationality of the investor or the employer to be a critical factor (Oya and IDCEA team, 2019).

In order to engage with common perceptions about employment outcomes of Chinese firms in Africa, the research focused on patterns and determinants of job creation and labour localisation; objective working conditions and skills development opportunities; and the characteristics of the emerging non-agricultural workforce across firms' sectors, size and ownership (Oya and IDCEA team, 2019). Specifically, the research tried to address the following questions (Oya and Schaefer, 2019):

- 1) What are the patterns and determinants of job creation and labour localisation in manufacturing and infrastructure development?
- 2) What are the working conditions in the leading firms in infrastructure construction and manufacturing?
- 3) To what extent and how do foreign and domestic companies contribute to skills development for African workers?
- 4) What are the characteristics of the emerging non-agricultural workforce and their implications for structural transformation?

Methods

The research project focused on two countries (Angola and Ethiopia), two sectors (construction and manufacturing), three types of ownership (domestic, Chinese and foreign non-Chinese), and two varieties of capital (state and private). The researchers adopted a multi-scalar labour regime analytical framework that combines three levels of analysis: i) *micro*, or firm-level, to analyse labour processes and workplace dynamics around wage bargaining, productivity, workplace safety, benefits etc.; ii) *meso*, or sector/supply chain-level, to look at market structures, global production networks, technology and types of firms; and iii) *macro*, or country and sub-national level, to assess the national and local labour markets and institutions, government policies and politics (Oya and IDCEA team, 2019).

As part of the preparatory work, several working papers and background studies were produced by the team. These investigated specific issues around China's role in late industrialisation, the Chinese labour market and trends and drivers of Chinese investment and construction projects in Angola and Ethiopia.

The project then employed a sequential mixed-method design to undertake the comparative analysis of labour outcomes in domestic, Chinese

and other foreign firms in Ethiopia and Angola. Combining qualitative and quantitative techniques allowed the team to triangulate and make sense of the data collected in three different phases.

After an extensive field scoping phase to select sites, sample targets and understand the micro, meso and macro contexts in each country, large N-sample surveys were used to capture measurable labour standards and workers' characteristics on a large scale—through firm-level employee and management interviews, and followed by a smaller scale follow-up phone survey to monitor trends 12-18 months after the main surveys (Oya and IDCEA team, 2019). The approach was to compare firms with similar characteristics. The team selected all leading foreign non-Chinese and domestic firms in their sectors (Oya and Schaefer, 2019). A total of 76 firms were included in the survey (42 in manufacturing and 34 in construction), of which 23 were domestic, 31 were Chinese and 22 were foreign non-Chinese. Over 1,500 low- and semi-skilled workers were interviewed, 850 in Ethiopia and about 700 in Angola. The sampling protocol is discussed in detail in Oya and IDCEA team (2019).

Qualitative research was used for scoping purposes at the beginning of the project and for triangulation, as well as to complement the data at the end of the project. Qualitative techniques included work-life histories and semi-structured and open interviews with company managers, supervisors, government officials and other respondents, as well as field visits and observations (Oya and IDCEA team, 2019; Oya and Schaefer, 2019).

Findings

The context

The research is situated in the context of China's 'Go Out' (or 'Go Global') strategy, which has encouraged Chinese firms to invest abroad since

the early 2000s. At the same time, from the 1990s onwards, the Chinese labour market was affected by profound changes, which included an informalisation of employment and a weakening of labour's strength in discussions with management. These changes, however, were accompanied by a consistent wage growth, which may be one of the driving factors of outward investment, especially in labour-intensive light manufacturing (Pringle and Qi, 2019), although it has been suggested that Chinese firms use other mechanisms to cope with increasing wages such as technology upgrading (Gelb et al., 2017).

Since the launch of the 'Go Out' strategy, China has become a large investor in Africa. From the Chinese perspective, Chinese foreign direct investment (FDI) to Africa remains marginal: in 2013, only 3.7% of the total Chinese outward FDI stock (US\$20.3 billion) was in sub-Saharan Africa (excluding South Africa). From Africa's perspective, the picture is different. In 2017, China was the fifth largest investor on the continent in terms of FDI stocks (UNCTAD, 2019). In 2013, Chinese firms invested in 52 African countries (though investments were highly concentrated in 21 countries). In terms of sectors, mining and construction received the highest shares of Chinese investment (Cheng and Wolf, 2018a).

In 2013, Angola and Ethiopia ranked 3rd and 10th as China's FDI stock destinations in sub-Saharan Africa. In Angola, the reported volume of Chinese investment was not particularly large, but the presence of Chinese infrastructure projects stimulated the emergence of new business activities such as the manufacturing of construction materials. Many of these Chinese businesses were not counted as FDI, as they were officially reported as domestic investment. In Ethiopia, China was by far the largest foreign investor, with a strong presence in the manufacturing sector. Chinese investment was predominantly market-seeking (Cheng and Wolf, 2018a).

Far larger in volume than Chinese investment are Chinese overseas contracted projects, which should be seen as exports of construction services from China. In 2004, 15% of revenues gained by the top 250 international contractors in Africa went to Chinese firms; by 2017, this share had increased to 60%. Angola and Ethiopia are among the main destinations for Chinese construction activities. In both countries, these construction projects have generated significant backward linkages towards domestic industries for construction materials, starting with cement and steel (Cheng and Wolf, 2018b).

Both Angola and Ethiopia have experienced limited structural change, although Ethiopia has a pro-active industrial policy that is starting to bear fruit. In the labour market, the lack of structural change is reflected in high levels of underemployment and poorly paid jobs. In these contexts, the effects of a large and growing presence of Chinese firms are investigated in a comparative perspective by IDCEA research.

Labour outcomes in Ethiopia and Angola

This section presents the findings of the research, as presented in Oya and Schaefer (2019).

The project found that Chinese firms had created many jobs, with a high proportion of them going to local workers. The Chinese firms sampled had created large absolute numbers of jobs, especially in subsectors such as road construction. Localisation rates were also found to be higher than generally assumed. In Ethiopia, they were above 90% (up to 100% for low-skilled occupations), and there were similar rates in other foreign companies. In Angola, where skill shortages make localisation more difficult, and where most Chinese firms interviewed were operating in the country for less than 10 years, localisation rates were found on average at 74% of the workforce in Chinese firms, compared to 88% in domestic and foreign non-Chinese firms. Localisation rates had grown in the past few

years due to a combination of increased availability of skills and growing costs of Chinese expatriate labour.

The labour market in both countries presented significant segmentation. In Angola, the workforce was divided into poor migrant workers (with lower education levels and limited work experience, and very often working for Chinese firms), and older, more skilled and educated urban workers (concentrated in domestic and foreign non-Chinese firms with more formal labour arrangements). This is partly because Chinese firms entered the Angolan market more recently compared to domestic and other foreign counterparts. In order to organise their workforce, many Chinese firms resorted to 'dormitory labour regimes' by bringing migrant workers from the centre-south of Angola and housed and feeding them in company dormitories, as it is common practice in some parts of China. This was not the case in the non-Chinese sampled firms, which had more established non-migrant workforces. In Ethiopia, the low-skilled workers employed by Ethiopian companies were older and with more years of work experience in the same firm, but less educated than those employed by Chinese and other foreign companies. Among the low-skilled workers, women made up a larger part of Chinese and other foreign firms' workforce. Women dominated the workforce in the textile, garment and footwear factories in Ethiopia, and men dominated construction material manufacturing in Angola.

The formality of working arrangements, defined by the presence of a written contract, was linked to the firms' origin in Angola and to the sector in Ethiopia. In both countries, written contracts are the exception rather than the norm, given informality in labour relations. However, the study compared conditions with leading, rather than average, domestic and other foreign firms in the target sectors. In Angola, workers in

Chinese firms were less likely to have written contracts than workers in domestic and foreign non-Chinese firms. This can be explained by the very different workforces that Chinese firms employed compared to other companies, as described above. In Ethiopia, on the other hand, workers in the manufacturing sector were more likely to have higher levels of formality than workers in construction, more often being hired on a temporary basis and with no significant differences by origin of firm. In terms of length of job tenure, in Ethiopia the longest tenures were with Ethiopian firms in both sectors, whereas in Angola these were with Angolan and foreign non-Chinese firms.

Wages in both countries depended on the characteristics of the workers, the sector and the country, but not on the firm's origin. In Angola, the main determinants of wages were skill levels, job tenure, work experience, socioeconomic status and location effects.¹ In Ethiopia, the main determinants of wages were skill levels, sector (with the construction sector paying higher wages), job tenure, education, work experience, socioeconomic status of the workers and location effects (where being in an industrial park was associated with lower wages). In both countries, the origin of the firm was not a determinant for wages: once the characteristics of the individual workers and the sectors were considered, Chinese firms were offering similar wages to domestic and other foreign firms. In Angola, wages were lower for workers employed in factories with a 'dormitory labour regime' (predominantly Chinese). However, these workers obtained free food and accommodation, and ended up saving more and having more disposable income compared to workers employed in other firms. Interestingly, the 'dormitory labour regime' was far less common in Ethiopia, even among Chinese firms.

All workers received wages above the international poverty lines. In Angola, all

¹ Data for Angola showed sample bias as due to force majeure only the permanent workforce was interviewed (Oya and Schaefer, 2019).

workers were earning above the sector minimum wage. In Ethiopia, a national minimum wage has not yet been set. Workers interviewed considered their wages as too low, especially those migrant workers who had to pay for their own food and accommodation and managed to save little of their income.

In addition to wages, firms offered non-wage benefits. Both countries did not have labour intermediaries nor complex labour recruitment systems; direct recruitment was far more common. In Angola, Chinese firms were more likely than other domestic and foreign non-Chinese firms to offer food and accommodation, whereas other firms had, at least on paper, more formal contracting arrangements with better sick leave, holidays and medical assistance. In Ethiopia, most Chinese and other foreign firms offered meals and transport allowance in factories unlike Ethiopian companies, where the proportion offering these benefits was much lower. Occupational hazards were broadly similar across firms, though were more common in the construction sector compared to manufacturing, and were slightly less common in Chinese firms than in domestic and other foreign firms.

Across all types of firms studied, training and skills development were offered more commonly in manufacturing firms. Chinese firms contributed to training and skills development at least as much as their counterparts; differences were in the formality of the training provided to workers, and in the modalities in which it was offered. In Angola, domestic and some foreign firms were providing formal training more often than Chinese firms. Both formal and informal training contributed to skills development of the workers, especially considering the low starting point in terms of skills. Migrant workers who entered the industrial and construction labour market for the first time with these jobs were the ones who gained the most in terms of skills.

In terms of labour relations, leading national firms, which had been long established in the country, were more used to having trade unions than foreign firms. Foreign firms (Chinese and others) were found to be more reluctant to engage with unions, and preferred settling disputes directly with workers. Labour conflicts were present in both countries, especially in the form of strikes over wages, but were more common in the Ethiopian manufacturing sector. Absenteeism and theft were especially common in Angola. Verbal abuse by managers and supervisors was found to be common in Ethiopia, and poor communication between workers and their managers was present in both countries. The weakness of labour institutions, especially the lack of a minimum wage in Ethiopia, contributed to the tensions among workers and employers, especially among recent foreign investors of different origins.

Overall, the research found that **the national and sector contexts, as well as the broader historical and political contexts of the host countries, had more influence on the labour outcomes and labour relations than the firm's origin.**

Industrialisation, movement of labour and structural transformation

Beyond the current effects of the presence of Chinese firms in African labour markets, the research also investigated broader structural transformation dynamics. In particular, it looked at the extent to which the existence of a large pool of unemployed or underemployed people in Ethiopia could translate into the creation of an industrial workforce. For Lewis (1957), unlimited supply of labour in the traditional sector allowed for labour transfers to the modern sector. Therefore, in Ethiopia, the large pool of labour employed in low-productivity activities can be, in theory, the basis for a labour surplus transfer.

The research showed that this movement of labour and the creation of an industrial workforce is neither automatic nor inevitable. In Ethiopia,

there were several key challenges affecting labour mobility across sectors. First, there were costs and frictions associated with the transfer of workers from agrarian-based settings to industrial production locations, especially around housing in secondary cities. Secondly, finding enough workers with the skills required by the modern sector is difficult, and similarly complicated is setting up systems to develop workforce skills, especially in a context where labour turnover is very high. Indeed, challenges exist not only in finding but also in retaining workers, who may have very different expectations and requirements around the job and wages vis-à-vis their employers. Overall, the research concludes that building an industrial workforce is a long and uneven process requiring concerted policy efforts and significant coordination between different levels of government and private business (Oya, 2019a).

Beyond the implications for the labour markets in Ethiopia and Angola, the research also addresses broader questions about China's role in contributing to (or hindering) structural changes in other developing countries. The literature has highlighted two main concerns regarding the potential negative impact of China on late industrialisation. First, that by exporting manufactures at competitive prices, China crowds out products from other developing countries, thus reinforcing Southern de-industrialisation. Secondly, that China's growth has been reliant on 'cheap labour', driving other developing countries to do the same, and pursuing the same cheap labour when investing in developing countries (Lo, 2018). However, the research indicates that the rest of the developing world has seen an expansion in manufacturing production and export at the same time as China's. Moreover, Chinese exports have been sustained by productivity growth, driven by

productive investment, rather than simply relying on low wages in a 'race to the bottom' (Lo, 2018).

What does this teach us?

This DEGRP research project started by examining the labour outcomes of Chinese investment and construction projects in Angola and Ethiopia. There is no doubt that the expansion of industrial investment and construction projects by Chinese companies in Africa has created a huge number of non-agricultural jobs. Beyond this, the project investigated whether there are major differences in labour outcomes for domestic, Chinese and other foreign firms. Overall, the project found that the main differences in labour outcomes are attributable to the context of the country and sector/production network, rather than the firm's origin.

The research findings challenged the idea of Chinese 'exceptionalism' in labour relations, thus contributing to dismantling the 'methodological nationalism' often implied in China-Africa studies. Labour practices are fluid, and to understand the multiple outcomes of labour relations of Chinese firms in Africa, one has to consider the diversity of Chinese firms and financing modalities, as well as the characteristics of other comparable firms (Lee, 2017), the features of the country context, the sector-specific patterns and production regimes (Oya, 2019b).

Finally, the research shed a light on China's contribution to the process of structural transformation in African countries, from the labour perspective. It highlighted the challenges embedded in the process, which again depends largely on the country, sector and firms' contexts in which it is situated (Oya, 2019a).

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