UKR Journal of Economics, Business and Management (UKRJEBM)
Homepage: https://ukrpublisher.com/ukrjebm/
Email: submit.ukrpublisher@gmail.com
Volume 2, Issue 7, 2026 ISSN: 3049-429X (Online)

Strategy of the main Asian and Western players in Cameroon's natural resources sector

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DOI: *https://doi.org/10.5281/zenodo.21350402*

Article History
Original Research Article
Received: 17-05-2026
Accepted: 22-06-2026
Published: 14-07-2026

Citation: Tsafack, O., & Mfewou, A. (2026). Strategy of the main Asian and Western players in Cameroon's natural resources sector. UKR Journal of Economics, Business and Management, 2(7), 82-90.

Abstract

Cameroon, rich in natural resources (oil, gas, minerals, timber, etc.), attracts many international players, particularly from Asia and the West, who deploy various strategies to secure their supplies and maximize their profits. Western players, such as European and American multinationals, focus mainly on oil, mining and forestry. As part of our research, we conducted a three-year study of the presence of these players in Cameroon. The survey was conducted among 98 large traders, 232 small traders and 335 consumers in different regions of the country. Semi-structured interviews were conducted with a wide range of stakeholders: heads of regional delegations of ministries, the Chamber of Commerce and the Groupement inter patronal du Cameroun (GICAM). Our results show that the strategies of Asian and Western players have distinct characteristics, but sometimes complement each other in certain areas, while creating significant competition for the country's natural resources. In the Western approach. It favors long-term strategies based on strict environmental standards, investment in sustainable infrastructure, and partnerships of varying degrees with local players and the Cameroonian state. However, slow administrative procedures and stringent regulatory requirements can put the brakes on some projects. The Asian approach, on the other hand, is more attractive, based on rapid and massive investment, often in infrastructure projects and key sectors such as mining and forestry. While these projects create jobs and promote infrastructure development, their environmental impact is often less controlled. Overall, this strategy is having a profound influence on Cameroon's economic and geopolitical relations, as the country finds itself at a crossroads between these economic powers. In 2020, Cameroon's oil production was around 30,000 barrels per day. The mining sector accounts for 4 to 5% of Cameroon's GDP. Companies such as Rio Tinto and Lundin Mining (Canada) are involved in the exploitation of mineral resources, particularly precious metals and ores. By 2024, around 60% of foreign direct investment (FDI) in Cameroon will come from China, particularly in the infrastructure and natural resources sectors.

Keywords*: Actors, Cameroon, Geostrategy, Natural resources.*

Introduction

Cameroon's resources continue to attract the interest of major Asian and Western players. They are characterized by great diversity, encompassing minerals, forests, rare earths, marine resources, biodiversity and manpower (Bass et al., 2020; Gazibo, M. et al., 2010). This interest in Cameroon continues to be sustained and manifests itself in various forms in bilateral relations with wealthy countries. On the one hand, Western countries such as the USA, France, the UK and Germany, and on the other, Asian countries such as China, Japan, India and South Korea, are also competing intensively for Cameroonian territory, particularly in the mining and forestry sectors (Essoungou, 2009; Lassagne, 2005).

Cameroon's destiny is closely linked to the multiple relationships it has with these great powers. The territorial expansion of these new players has its roots in the end of European colonial tutelage. These growing interests for Cameroon are underpinned by a marked intensification since the launch of the summit between the European Union (EU) and the African Union (AU) in Lisbon on December 8-9, 2007, followed by the first US-Africa summit on August 6, 2014 at the State Department. The 1996 Asia-Europe Meeting (ASEM) in Bangkok also contributed to this convergence dynamic. This momentum is reflected in the strengthening of Africa-Asia relations, which are generally structured bilaterally, just as they are with Western countries.

The first Tokyo International Conference on African Development (TICAD) was held in 1993 under the auspices of Japan. Since then, TICAD has been organized in collaboration with the United Nations, the United Nations Development Programme (UNDP), the World Bank, the African Commission and the African Union (AUC). The first India-Africa Summit took place from April 4 to 8, 2008 in New Delhi, India, marking the first meeting between Indian heads of state and those of 14 African countries selected by the African Union. Finally, the first South Korea-Africa summit, held in June 2024 in Seoul, illustrates the country's desire to deepen economic cooperation with African nations. In this multifaceted relationship, the United States, France, China, Japan and India, among others, are strengthening their economic presence and influence in Cameroon through regular visits, summits and forums, agreements between public and private companies, and development projects.

1. Opportunities and the new race for Cameroon's natural resources

During the 1990s and early 2000s, the geopolitics of resources had all but disappeared from the agenda of decision-makers. However, the gradual rise in energy prices, which culminated in the 2008 food riots that left demonstrators dead, as well as the events of 2022 and 2023, notably the Russian-Ukrainian crisis and the Israeli-Palestinian crisis, have put this issue back at the heart of international politics. The new competition for access to natural resources has shifted to the terrain of raw materials and international relations, with a particular focus on fossil fuels, forests, agricultural raw materials and fisheries resources. Faced with this growing global demand for natural resources, Africa is increasingly attracting the interest of these macro-economic players. This in a development context characterized by growing pressure on these resources and average annual demographic growth of 2.3%. These trends regularly lead to conflict dynamics, environmental degradation, land tensions and rivalries between players.

Despite the immense opportunities open to it, the country is struggling to capitalize on its vast oil and mining resources, due to shortcomings in the implementation of the laws governing the extractive industries, a mismatch with the actual practices involved, and above all the underlying neo-colonial strategy.

- Conflict dynamics surrounding mining in Cameroon

Cameroon's extractive resources generate significant flows of crude oil to the outside world, involving companies such as Perenco RDR (Franco-British), New Age (British), Addax Petroleum (a subsidiary of the giant Sinopec) and Lukoil (Russian), among others. While these resources may seem modest compared with those of other African countries, they are nonetheless of strategic importance on a global scale. Cameroon's oil, timber and gold fuel the technology industries of its major players. Oil exploration in Cameroon dates back to 1947, with the first commercial discoveries in the Rio del Rey basin in 1972. However, it wasn't until 1977 that the country became an oil producer, following the start-up of production from the Kolé field. Although production peaked at 186,000 barrels per day in 1985, it began to decline in 1986, the year of the “oil counter-shock”. Faced with this situation, the government introduced incentives to boost exploration and production in 1990. Thanks to these initiatives, oil production was launched in the Douala/Kribi-Campo basin in 1997, from the Ebomè field (SNH, 2021).

In return, Cameroon imports its refined oil from several foreign suppliers, including Ebene Consulting International, Horizon Commodities, Sdem Sarl, Malega Energie Service, Alima Oil Ltd, and Perenco Rio Del Rey. High-tech macroengineering in Cameroon encompasses all industrial activities aimed at designing innovative products and perfecting various fields such as robotics, nanotechnology, pharmaceuticals, armaments and aerospace, among others. Major Asian and Western players are investing in the exploitation of raw materials in Cameroon and neighbouring regions. The strategic ores required for these industries are rare materials, which means intense economic competition between these major players.

Large-scale mining operations generate substantial profits for foreign companies, but few benefits for the Cameroonian population. In 2020, the Organisation for Economic Co-operation and Development (OECD) noted that, in half of sub-Saharan African countries, tax revenues represented less than 15% of gross domestic product (GDP), compared with an average of 35% in OECD countries and 23% in Latin America. Asian countries are also positioning themselves as major competitors in mineral exploitation. The Middle Kingdom, in particular, is now one of the world's leading economic powers, and energy supplies are of vital importance to these major Asian players.

However, the economic dynamism of China, Japan, India and South Korea, as well as sustained growth in the USA, France, the UK and Germany, has led to a significant increase in their oil consumption. These countries are vying for access to Africa's oil resources, which are largely open to foreign investors, as no African country has ever truly nationalized its oil activities. Unlike the Middle East, Mexico, Venezuela, North Africa and Russia, sub-Saharan Africa is fully integrated into the competitive segment of the international oil industry, and is therefore the "stakes zone" for private multinational oil companies.

Whereas France has long followed a policy of appropriating reserves, particularly in Africa, to cover its own oil needs, the United States has, since the Reagan years, explicitly based its oil policy on the use of market forces, thus relying on private players to ensure the country's oil supply (Perrin, 2020; Johnson et al., 2019). As in other parts of Central Africa, Cameroon's wealth is attracting many major Asian and Western players. However, the population remains prey to precariousness, faced with rising inflation and low purchasing power. For example, interviews with local officials reveal that, despite Cameroon's wealth of natural resources, many areas of the eastern region suffer from inadequate infrastructure.

Our results clearly show that many young people drop out of school at an early age, often after elementary school, to take up artisanal gold mining, a precarious activity. Complaints from communities living near mining sites highlight the social and environmental shortcomings of mining. In general, people describe the deplorable state of impassable roads, the absence of drinking water and electricity, and environmental pollution. These operators are perceived as predators of the minerals essential to their technology.

Mining inventories, begun during the German colonial period, were intensified under French tutelage and after Cameroon's independence. From 1985 onwards, more in-depth work was undertaken, including aeromagnetic surveys and a mining inventory operation carried out in partnership with the United Nations Development Programme (UNDP), the French Bureau de Recherches Géologiques et Minières (BRGM), the German Bureau de Recherche Géologique (BRG) and the Canadian company Alcan. This research revealed several geochemical anomalies, showings and mineral deposits covering 40% of the national territory, most of them concentrated in the eastern region of the country (Nkoatem-Zambo, 2020). This has given rise to the region's mining legend, described by some as a "mining scandal". However, eastern Cameroon is also home to the country's largest equatorial forest basin, with its rich biodiversity.

In this region, gold mining exposes populations, particularly women, to the risk of poisoning. An environmental and health disaster for which Chinese companies are regularly held responsible, according to complaints from the local population.

Since the promulgation of the Mining Code in 2001, and especially with the announcement of its various implementing decrees up to 2035, Cameroon has undergone a profound transformation in its mining policy. In particular, the country has major deposits of iron ore, bauxite, diamonds, limestone, rutile and cobalt-nickel, which are attracting the interest of numerous mining companies due to the diversified mining potential it offers. Since the start of 2014, over 1,090 new mining authorizations have been granted. However, the spin-offs are very low.

In a press release dated February 24, 2021, the Ministry of Mines, Industry and Technological Development denounced the criminal actions of certain operators who owe the Treasury a total of 173.644 million Fcfa. The 16 companies singled out for non-payment of mining taxes are BC Corporation Sarl with a debt of 25.668 million; ABS Holding with 20.628 million; LC Exploration Ltd with 17.946 million; Cameroon Minerals et Resources Sarl with 16.846 million; Sycma Sar with 9 million; Dacaf with 16.182 million; Southland Mining Cameroun with 15.606 million; Cameroon Extraction Ltd with 8.640 million; Naina Cameroun Sarl with 8.568 million; Cameroon Emergence Corp with 7.812 million; Global ABS Engineering with 7.344 million; Société Camerounaise d'Exploitation Minière with 7.830 million; Su Yang with 4.518 million; LC Minerals Ltd with 6.858 million; Aurinco with 99637 and Eufrasia Cameroun with 99,000 FCFA. This region, which is in competition with several major players, borders the Central African Republic and Congo Brazzaville. Its subsoil is rich in mineral deposits, notably iron at Mbalam, nickel and cobalt at Lomié, and diamonds at Mobilong.

2. The evolution of foreign interest and competitiveness in the extractive sector in East Cameroon

The interest of major Asian and Western players in Cameroon's minerals depends above all on the country's political stability and geostrategic position in Central Africa, as well as on mining conditions and the relative value of resources. The global energy crisis of 2021-2023, caused by a worldwide energy shortage, was triggered in 2021 by the strong global economic recovery following the recession caused by the Covid-19 pandemic from 2020, and amplified from 2022 by Russia's invasion of Ukraine. Faced with this situation, these major players have diversified their activities. They have turned to oil in the Littoral, South-East and Duckbill regions in Cameroon's Far North, to gold in the East and N'Gaoundéré in the Adamaoua region, to bauxite in Fongo Tongo in the West, to iron ore in Balam in the South, to uranium in Poli in the North and to timber in the Centre and East regions.

- Competition in gold and diamond mining in Cameroon

States outside Cameroon are deploying strategies directly linked to the exploitation of raw materials in these regions. Gold mining in Cameroon remains mainly artisanal and semi-industrial in the mining sector, still contributing very little to the national economy (Voundi, 2021). According to the Extractive Industries Transparency Initiative (EITI), mining and quarrying contributed just 1.7% to the state budget in 2019, compared with over 92% for hydrocarbons. In 2022, mining production was notably limited to 12,000 ounces of gold. Discoveries such as Bibemi could therefore contribute to the emergence of a future gold industry, while the country is also making progress on bauxite in the village of Minim Martap and iron in the village of Mbalam. Mineral resources at the Bibemi gold project exceed 300,000 ounces (Agence Ecofin, 2023). The project is 90% owned by Oriole Resource.

Semi-mechanized gold mining is carried out by 47 foreign mining companies, in full competition in the mining basin, mainly in the Eastern region. This activity produces around 5.78 tonnes of gold per year, of which only 7% is declared through the collection of the impôt synthétique libératoire (ISL) (INS, 2021). This type of mining employs very few Cameroonians, but feeds a national circuit of corruption, benefiting above all the legal holders of titles and authorizations, as well as the forces of law and order paid in exchange for their protection. Artisanal diamond mining, also known as diamond milling, is practiced on 38 active sites, all located in the eastern region of the country, near the border with the Central African Republic, in two of the region's communes. This activity employs 460 diamond miners and directly benefits 2,000 people, spread over some twenty villages (INS, 2020).

The diamond mill produces 4,640 carats of diamonds a year, 20% of which are sold in the declared sector. In macroeconomic terms, the impact of gold production remains relatively low (0.3% of GDP in 2019), but it feeds an important national economic circuit: 95% of the value created, or 68 billion FCFA per year, remains in Cameroon. By contrast, the diamond industry is marginal, injecting just 450 million FCFA a year (83% of the value created) into the economy. Despite the informal nature of these sectors, they manage to generate wealth and stimulate many other economic activities, such as the provision of services and equipment. What's more, the State benefits indirectly from these multiplier effects, notably through value-added tax on products consumed and foreign currency inflows.

Table: Are you satisfied with the presence of resource companies in your region?

Activity and workforce	**satisfied**	**dissatisfied**	satisfied not	**Total**
Teachers	2.65	4.26	5.88	12.79
Mine diggers crafts	1.91	6.47	8.67	17.05
Farmers	3.23	4.26	5.44	12.94
Forestry company	5.88	3.08	4.55	13.53
Mining company	6.91	5.15	2.21	14.26
Road company	5.73	3.23	2.94	11.91
Self-employed	0.05	6.76	5.73	17.50
Total	**31.32**	**33.23**	**35.45**	**100**

Source: *survey of local players, 2023*

Our results show that the exploitation of a wide range of natural resources for export does not benefit the local population. Over 70% of the population is calling for a genuine bilateral mining agreement, with direct local processing. By processing our minerals locally, we could benefit from all the employment opportunities, improved living conditions and other direct advantages. However, 35.45% of the population expresses dissatisfaction with the presence of foreign exploiters of our resources. The infrastructures sometimes built by these foreigners do not meet the expected quality standards. Indeed, the unsustainable exploitation of these natural resources directly deteriorates the living conditions of local populations and harms their health. It also leads to the destruction of entire ecosystems and disrupts their overall functioning.

- Competition for iron ore in Cameroon

In a fierce competition for mineral resources, China is leading the way in terms of access to iron ore, while

Cameroon aims to create greater local added value. China has a considerable lead over the other players. China's state-owned Sinosteel Ltd has finally obtained a permit from the Cameroonian authorities to mine iron ore at the Lobé mine site in the south-west region of Cameroon. With estimated reserves of 632 million tonnes, Sinosteel plans to invest $675 million in the project, with the aim of producing 10 million tonnes of iron and 4 million tonnes of concentrates per year over the next fifty years (Saha, 2018). Cameroon hopes to generate annual revenues of around US$38 million.

Located in the Kribi region, close to the port of the same name, Sinosteel's mining site should theoretically not encounter the logistical hurdles encountered by other mining projects, such as those of Shandong Weiqiao and Chinalco in Guinea, where railroad construction is underway. With regard to iron ore mining at Kribi, Sinosteel forecasts annual revenues of 22.9 billion CFA francs for Cameroon. On May 6, 2022, the subsidiary of the major Chinese mining company Sinosteel Corporation signed a mining convention in Yaoundé for the exploitation of the Kribi iron ore deposit.

- Competition for uranium, sapphire, zinc, nickel and manganese in Cameroon

The economic growth of major Asian and Western players is having a dramatic effect on mineral resources. Since 2010, the discovery of new mineral deposits has triggered intense competition between these players. The Ministry of Industry, Mines and Technological Development issued an exploration permit covering an area of 1,000 km² to Nu Energy Corporation Cameroon, a subsidiary of the Canadian company Mega Uranium Ltd. At the latter's initiative, a project presentation meeting was organized in Poli, with the participation of local populations and their leaders. The project raised both hopes that this department, the most landlocked and poorest in the Northern Province, could be lifted out of poverty, and fears about the potentially harmful effects of mining this formidable mineral.

The project's promoters assured local communities that uranium mining would be carried out to strict standards and under the supervision of the International Atomic Energy Agency.

- Environmental impact for Cameroon

The process of awarding the exploration permit was rushed, and almost triggered a diplomatic incident between Cameroon and Chad. Mega Uranium Corporation Cameroon PLC obtained an exploration permit and began prospecting in Teubang, a locality that has been the subject of disputes due to the absence of clearly defined boundaries. Although these activities have been halted to date, a visit to the site by the Service National Justice et Paix (SNJP) revealed that the Chadian flag was flying over the land in question. The inhabitants of the area claim to belong to a Chadian chiefdom. Chadian and Cameroonian disputes and claims over the area prompted the Canadian company to cease operations, allowing Chadian company Chad Mining Services to expand its activities in Teubang since 2009.

What's more, Faro National Park is included in the Mega Uranium permit at Poli, raising an obvious contradiction in the state's actions. The machinery used for exploration has generated noise pollution that disrupts the behavior of animals in the hunting area managed by the Voko-Bantadjé community, which acts as a buffer zone between the communities and the park. With regard to environmental impacts, measurements and samples were taken. According to CRIIRAD, these measurements reveal significant levels of radiation. Employees, who live nearby and are exposed to radioactive materials on a daily basis, are therefore subject to external radiation exposure, as well as internal contamination through ingestion and inhalation of radon and dust.

Niger's environmental landscape is reminiscent of that of northern Cameroon, where similar explorations have taken place in the past. In the event of exploitation, a similar scenario is to be feared: water contamination and depletion of the water table, the inexorable advance of the desert which continues to devour the rare fertile lands, the presence of radioactive pollution in the towns of Arlit and Agadez, with radiation levels some 500 times higher than normal. In terms of health, irradiation of the respiratory tract could lead to serious illnesses such as lung cancer, pulmonary hypertension and other respiratory disorders, increasing mortality rates (David Bayang, 2023). In terms of social consequences, none of Poli's residents hold managerial positions. Moreover, the influx of job-seekers into the area has considerably increased the cost of living, leading to increased pressure on resources, the unhappiness of the poorest and the happiness of opportunistic traders. The absence of appropriate measures could lead to a situation similar to that seen in Canada, in Ontario, in the aboriginal community of Déline, inhabited by the Déné people, numbering around 800, and known today as the “village of widows”.

- Competition for timber in Cameroon

In terms of economic and social development, the countries of Central Africa share a colonial heritage with France, Belgium, Germany, Portugal and Spain. This heritage is still deeply rooted in language, culture and preferential economic ties, but it is also evolving by turning towards Asian countries. In this sub-region, which includes Cameroon, Gabon, Equatorial Guinea, the Republic of

Congo, the Central African Republic and Chad, logging is becoming increasingly intensive and involves many foreign players.

In this sector, two regional organizations stand out for their commitment to coordinating and promoting development activities: the African Timber Organization (ATO) and the Central African Rainforest Ecosystem Conference (CEFDHAC). Cameroon is home to some of the most diverse and threatened forests in the Congo Basin. The Moungo, Nkam and Sanaga Maritime departments remain the preferred areas. The Ebo forest, which extends over 1,400 km² between the coast and central Cameroon, is a remarkable treasure. Together with the other forests of the Congo Basin, this area represents the second largest tropical forest massif after Amazonia. Despite official estimates that 2 million hectares of Cameroon's forests have disappeared since 1980, the most recent data on forest area is almost 10 years old. Cameroon ranks among the world's top five exporters of tropical logs, with a 40% increase in industrial timber production since 2019.

However, this exploitation is to the detriment of the climate, the environment and biodiversity, also affecting agroforestry populations and leading to significant human consequences such as floods, droughts, water pollution, epidemics and road accidents.

- Diverse natural resources and low economic returns

Cameroon enjoys a relative diversity of resources. These include agropastoral sectors such as cocoa, bananas, coffee and livestock, as well as oil and mining resources such as aluminum, gold, uranium and diamonds. This diversity attracts many foreign investors. The country is also a member of the Economic and Monetary Community of Central Africa (CEMAC) and the Economic Community of Central African States (CEEAC). Stable for several decades, in recent years it has been confronted with attacks by the terrorist group Boko Haram in the Far North region and the separatist movement in the English-speaking regions. The country's economy stands out as the largest and most diversified in the sub-region, accounting for 45% of CEMAC GDP in 2021, according to IMF data. However, it remains largely dependent on raw products, despite a recent trend towards increasing raw product exports. The real GDP growth rate reached 3.4% in 2022, down slightly from 3.6% in 2021, mainly due to continued investment and increased non-oil activity.

Cameroon's regions also have significant mining resources, but these are largely under-exploited. The contribution of the mining sector (excluding oil) to GDP remains marginal, representing less than 1%. The forestry sector, driven by major players (Europe, America, Asian countries), currently generates around 45,000 jobs, including 22,000 in the informal sector. It accounts for around 20% of the value of exports and is the country's second-largest export product. In addition, the timber sector contributes around 6% to GDP. However, the economy remains largely dominated by the exploitation of hydrocarbons. In 2018, hydrocarbons accounted for just over 3% of gross domestic product (GDP), and 41% of the country's exports depended on this sector (INS, 2023).

Gold mining remains mainly artisanal, making a negligible contribution to the national economy. According to the Extractive Industries Transparency Initiative (EITI), mining and quarrying made a small contribution of 1.7% to the state budget in 2019, while hydrocarbons accounted for over 92%. According to the Organisation camerounaise des industries de transformation de l'acier (OCITA), total production by players in the sector reached 260,000 tonnes of iron in 2022, out of an installed capacity of 450,000 tonnes. As for diamonds, the 16th report of the Extractive Industries Transparency Initiative (EITI), published on December 16, 2022, indicates that 870.55 rough carats were exported in 2020, for an estimated monetary value of 51.51 million FCFA (INS, 2023).

However, resorting to sand-picking at sea to alleviate the scourge of unemployment represents a high-risk activity around which young people are mobilizing. Agriculture, the mainstay of the Cameroonian economy, employs around 70% of the working population and contributes 80% of the country's GDP in the primary sector. It also accounts for a third of foreign exchange earnings and 15% of the country's budgetary resources. Overall, the economic impact on the population is reflected in life expectancy, which shows a positive and significant long-term trend. Clearly, the development of a market economy in Cameroon is helping to improve living standards.

Despite mixed efforts in terms of infrastructure, growth remains non-inclusive, with extreme poverty affecting 25.5% of the population by 2022. The business climate remains difficult due to weak governance, marked by corruption and smuggling. External and public accounts depend on fluctuating commodity prices, with a breakdown of exports in 2022: 40% oil, 26% gas, 10% cocoa and 10% timber. Public revenues remain low, amounting to 15.5% of GDP in 2022, although up on 2021. The banking system, though present, remains fragile and modest in size. Infrastructure, particularly in the electricity sector, is inadequate. Cameroon faces political risks due to persistent insecurity in the Far North region and tensions in the English-speaking North-West and South-West regions. Generally speaking, the management of natural resources has negative socio-economic consequences in various parts of the country.

3. Systemic interrelations and comparative analysis of Asian players (China, Japan, India and South Korea) in Cameroon

The presence of Asian countries in Cameroon is part of an "interaction" dynamic that brings together different elements. We have analyzed this dynamic from a systemic angle to show that interactivity is also an emerging property, particularly in the context of competition for natural resources in Africa by major international players. This interaction manifests itself both at the level of individual entities, such as direct bilateral relations with Cameroon, and at the level of more complex entities, such as the Shanghai Cooperation Organization (SCO), the Association of Southeast Asian Nations (ASEAN) or the European Union.

This Asian presence in Cameroon is also influenced by geo-economic and geopolitical factors, modeled by national policies that encourage investment, in line with regulations established by legislators. Our analysis focuses on the interaction between Asian countries, within an epistemology of complexity, in order to understand the system of actors in place. However, it is essential to note that local populations do not always benefit from the exploitation of their resources. This raises the question of the impact of this presence on the systemic socio-economic development of the country's various regions.

In our analysis, we consider the presence of macro-actors in Cameroon to be protean, particularly where investment is concerned. We have examined the various forms of bilateral and multilateral relations with Cameroon, emphasizing collective and network partnerships, as well as the autonomy and interdependence of each country concerned. These investments translate into the construction of roads, schools, water supply systems, bridges, etc. in villages and regions across the country. The existence of these infrastructures depends on interaction with the local population.

To generalize the characteristics of the interaction between these macro-actors, we analyzed the interaction patterns of China, South Korea, Japan and India in Cameroon. This analysis reveals a win-lose political dynamic and a component of vulnerability, leaving the population in a situation of social precariousness. Our analytical approach is based on the Mactor method, which aims to define a matrix of alliances, competitions and tactics in investments, as well as on the theory of poverty dynamics recorded in different regions of Cameroon.

The first major player remains China, a densely populated East Asian country. Its vast territory offers a diversity of landscapes and historical sites, and it is one of the world's largest financial centers. In 2023, the wealth of this macro-actor, measured in terms of GDP at market exchange rates, amounted to $18,300 billion, or 73% of the GDP of the United States, 10 times more than in 1990 (when it was 7%). As the world's second-largest economy, China has experienced exceptional economic catch-up since the 1990s, and exerts a significant influence on the other players in Cameroon. Japan, meanwhile, saw its GDP fall by 0.5% between January and March 2023 compared with the previous quarter, whereas Bloomberg economists were expecting a more moderate 0.3% decline. GDP growth in the fourth quarter of 2023 was revised to 0% (from +0.1% initially forecast).

- Analysis of power relationships between Asian players

The Asian players in the system under study enjoy multiple degrees of freedom, which they exploit through strategic actions to achieve the objectives they have set themselves, with the aim of realizing their mineral and timber investment projects in Cameroon. Our analysis of the competitive dynamics between these players, their power relationships (constraints and means of action), is essential to understanding the evolution of future strategic stakes in the country, as well as the foreseeable tensions between the different players.

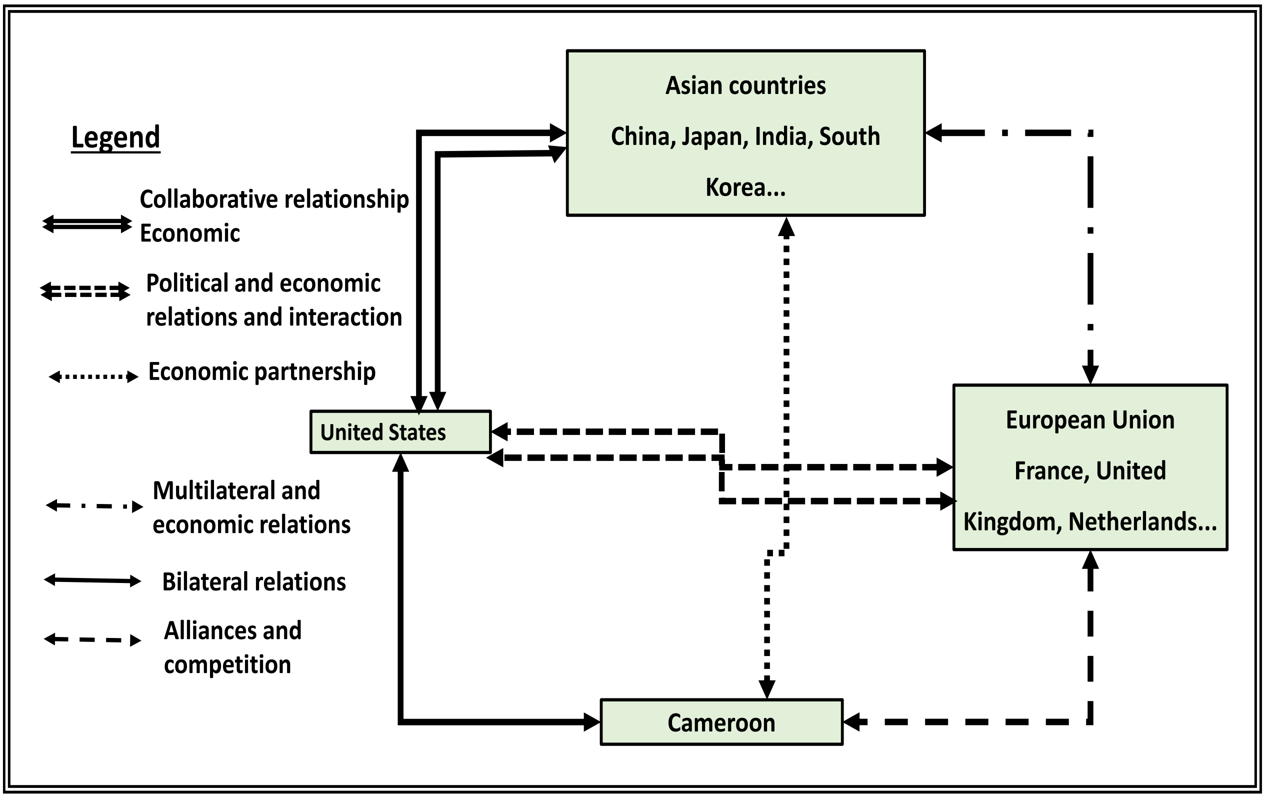
For example, the competition between Americans and Europeans in the Rio del Rey basin in 1972 didn't allow Cameroon to be recognized as an oil producer until 1977, when the Kolé field went into production. In Cameroon, there are two types of player: on the one hand, the state (notably the Ministry of Mines and Energy and the Société Nationale des Hydrocarbures), and on the other, foreign oil companies (ELF, Total, Mobil, Pecten, Gulf). Addax Petroleum, a subsidiary of the giant Sinopec, is Cameroon's second-largest crude oil producer, with a 30% market share.

Representing around one-fifth of humanity, China's influence is proportional to its size. Today, it plays a leading role in world trade and is a major competitive power for the United States. In the timber sector, between 20 and 30 Chinese companies are active in Cameroon throughout the year. The main species exported are Ayous/Obeché, Awoura, Dabema, Ekop Ekusek, Azobé, Kossipo, Okan/Adoum, Tali, Bilinga and Naga. Despite this, France remains the main investor in Cameroon, ahead of the USA and other European and Asian countries (Jin, Z. 2015; Botha, I. 2006).

The direct influences between these players are analyzed using the strategic positioning table, highlighting the specific means of action of each. Power relationships are examined, taking into account both direct and indirect means of action (one player can influence another via a third player). This analysis of power relationships highlights the strengths and weaknesses of each player in Cameroon.

China is now the world's second economic power, with twice the economic weight of Japan, India and South Korea in the global balance of power. This pre-eminence implicitly translates into a double weighting in its investment objectives in Cameroon.

Diagram of alliances and competition in Cameroon's mineral and timber industries



Source; Ornella Tsafack, 2024

Bilateral diplomatic relations are characterized by a balance of power between nations, observed by the international community. Multilateral economic diplomacy has acquired a new dimension with globalization, leading to increased competition between major players. In 2023, for example, China-Cameroon relations illustrate this dynamic: China has become Cameroon's leading trading partner, with a significant increase in bilateral trade. China exports manufactured goods and technologies to Cameroon, while Cameroon mainly exports raw materials such as oil, wood and cotton. Despite the many advantages of this cooperation, a number of challenges remain. Critics point to Cameroon's growing indebtedness to China and the lack of direct benefits for local populations, particularly in terms of job creation and skills transfer. In addition, some projects, while ambitious, struggle to integrate a sustainable dimension, particularly in terms of environmental impact.

Thus, this diagram highlights the interplay of alliances and potential competition in the evolutionary dynamics of macro-actors, particularly in the mineral and timber investment sector in Cameroon. The evolution of the system has the advantage of being highly operational, encompassing a wide variety of games involving numerous players in the production and export of natural resources. In this sense, these relationships differ from the models developed by each country in its interactions with Cameroon (Asante, R., 2018; Alden, C., 2005).

Clearly, international relations between Cameroon and its partners cover all existing interactions, whether political, economic or commercial. The European Union is Cameroon's main trading partner. Cameroon's exports to the European market account for over 40% of its total exports, while imports from the EU represent around 30% of the country's total imports.

Cameroon enjoys important bilateral relations with France and Great Britain, both of which are historical partners of the country. This cooperation has both advantages and disadvantages.

Franco-Cameroonian cooperation is governed by agreements signed on November 13, 1960, revised in February 1974 and supplemented by new agreements in 1976, 1980, 1985 and 1990. A legal framework has been put in place, including a major joint commission bringing together experts from both countries every two years. In 2021, according to the Institut de la Statistique du Cameroun, France is Cameroon's second-largest supplier, with a market share of 9%, behind China, whose share has nevertheless dropped by one point between 2020 and 2021 (17% in 2021). French imports remain concentrated, but will exceed exports in 2022, due to hydrocarbon imports. French imports from Cameroon will total 1 billion euros in 2022, up sharply by 743 million euros (+286%) on 2021. However, these imports remain concentrated on a few products (hydrocarbons, agricultural, forestry and agri-food products).

The disadvantages of this cooperation can be seen at several levels. On the trade front, Cameroon's trade balance remains in deficit, despite an improvement due to the purchase of petroleum products by France. On the economic front, agreements between the two countries make France an obligatory intermediary for any trade between Cameroon and another foreign country, underlining Cameroon's economic dependence on France. The situation is similar for other international communities.

Between 2000 and 2007, trade between China and Africa increased sevenfold, reaching $70 billion. China is generally unconcerned about social and environmental standards. Environmental standards, in particular, are often overlooked in the search for natural resources and the construction of infrastructure projects (roads, bridges, railroads, dams, etc.), as evidenced by the failure to comply with international standards in the construction of the large Memve'ele and Mekin hydroelectric dams, as well as the illegal import of 20% of tropical timber from Cameroon (Vanessa, M. et al., 2019; Amin, J. A., 2018).

Although Japan has made a significant contribution to Cameroon's regional development, challenges remain. The implementation of projects sometimes comes up against obstacles, such as logistical difficulties or delays in infrastructure. In addition, Japan seeks to harmonize its approach with local needs in order to maximize the impact of its development aid. Nevertheless, cooperation between Japan and Cameroon offers promising prospects, particularly in the fields of industrialization, ecological transition and the promotion of renewable energies. The Japanese model of sustainable development, based on technological innovation and respect for the environment, could play a key role in the future of regional development in Cameroon.

Conclusion

In the systemic interrelation, minerals play a central role in certain African political systems, weakly influencing their stability or instability according to price fluctuations and the power games played beyond the continent, in the boards of directors. In Cameroon, the oil sector, and in particular the oil industry, is the focus of considerable interest. Every action taken in the oil sector, from upstream to downstream, contributes to the development of what might be called a “hydrocarbon policy”. To understand the dynamics of a network, it is essential to take into account the actions of players outside the political-administrative apparatus, such as civil society and the private sector, which operates within a corporatist framework. Each sector is governed by a frame of reference that motivates the actions of its players. According to Crozier and Friedberg, this collective action is subject to constraints that can also encourage the emergence of parallel frameworks of action or activity. Cameroon's integration into the oil industry means that it is part of various producer and consumer networks.

Today, Cameroon is one of the leading oil-producing countries in Central Africa. Its coastline covers a large part of the Gulf of Guinea. The Chad-Cameroon pipeline has generated around 500 billion CFA francs in profits for Cameroon over the past 20 years. Although Cameroon is a near-monopolistic refiner, a new Niger-Cameroon pipeline project via Chad is currently being prepared to diversify the country's oil supplies.

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