

Analyzing U.S. and French Influence in Madagascar's Governance Crisis: Strategic Minerals, Manufactured Instability, and the Battle for the Indian Ocean Rim

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ABSTRACT

Madagascar's October 2025 military transition—catalyzed by youth-led protests against the Rajoelina administration—cannot be adequately understood through the lens of domestic politics alone. This paper applies a neo-mercantilist geopolitical framework to argue that the island nation's recurring governance crises are structurally embedded within great-power competition for its vast deposits of graphite, nickel, cobalt, and ilmenite, as well as its strategic position astride the Mozambique Channel. Drawing on historical precedent from the 2009 coup, empirical data on foreign direct investment patterns, critical minerals supply chain analysis, and documented influence operations, this study systematically examines the roles of France, the United States, and China in shaping—and exploiting—Madagascar's political instability. The findings reveal that while the 2025 transition was internally generated by legitimate socio-economic grievances (including a 78% poverty rate and chronic famine in the south), external actors engaged in what this paper terms 'extractive diplomacy': the opportunistic leveraging of instability to secure preferential resource access. France's *Françafrique* networks, U.S. intelligence interests in the Mozambique Channel, and Chinese state-enterprise mineral acquisitions represent competing but mutually reinforcing vectors of interference. The paper concludes that Madagascar's trajectory reflects the broader paradox of resource-rich, governance-poor states in the 21st century and advocates for a Pan-African sovereign wealth framework as a structural remedy.

Keywords: *Strategic Minerals Supply Chain; Mozambique Channel Geopolitics; Neo-mercantilism in the Indian Ocean; Resource-driven Coups; Extractive Diplomacy; Françafrique; Critical Minerals; Madagascar Governance*

I. Introduction

Madagascar—the world's fourth-largest island—occupies a position of compounding strategic importance that belies its peripheral status in mainstream international relations scholarship. Straddling the western Indian Ocean along the eastern edge of the Mozambique

Channel, the island is simultaneously a biodiversity sanctuary of global renown, home to over 200,000 species found nowhere else on Earth, and a geological repository of critical minerals increasingly indispensable to 21st-century energy transitions. This dual identity—ecological treasure and mineral storehouse—has made Madagascar not merely a subject of developmental concern but a theater of geopolitical competition that intersects post-colonial French interests, American strategic recalibration in the Indian Ocean, and China's systematic acquisition of battery-critical raw materials.

The October 2025 military transition, triggered by sustained Gen Z protests against President Andry Rajoelina's administration, represented the latest episode in Madagascar's cyclical governance crises. Since independence from France in 1960, the island has experienced four direct military interventions (1972, 1975, 2009, and 2025) and persistent constitutional instability that has consistently derailed democratic consolidation. The 2025 events, however, unfolded within a qualitatively different global context: the acceleration of the green energy transition has elevated Madagascar's graphite reserves—estimated at approximately 200 million tonnes—to a status comparable to strategic oil reserves, creating powerful incentives for external actors to influence the island's political trajectory.

This paper advances a thesis that synthesizes internal political economy with external geopolitical pressure. While the proximate causes of the 2025 transition were authentically domestic—rooted in an 78% poverty rate, entrenched elite corruption, and the catastrophic humanitarian situation in Madagascar's southern region—the persistence and specific configuration of instability reflect deliberate or opportunistic external interventions. Specifically, this research argues that the United States, France, and China engage in overlapping but distinct modes of what the paper terms 'extractive diplomacy': the strategic cultivation, manipulation, or exploitation of governance crises in resource-rich states to secure preferential access to critical commodities or strategic maritime positions. The evidence presented ranges from documented investment flows and security assistance programs to historical patterns of influence and structural analysis of the mineral supply chain.

Figure 1 below illustrates the distribution of Madagascar's assessed strategic mineral reserves, providing the material foundation for the geopolitical analysis that follows.

Figure 1: Madagascar Strategic Mineral Reserve Distribution (Estimated Share of Total Assessed Deposits)

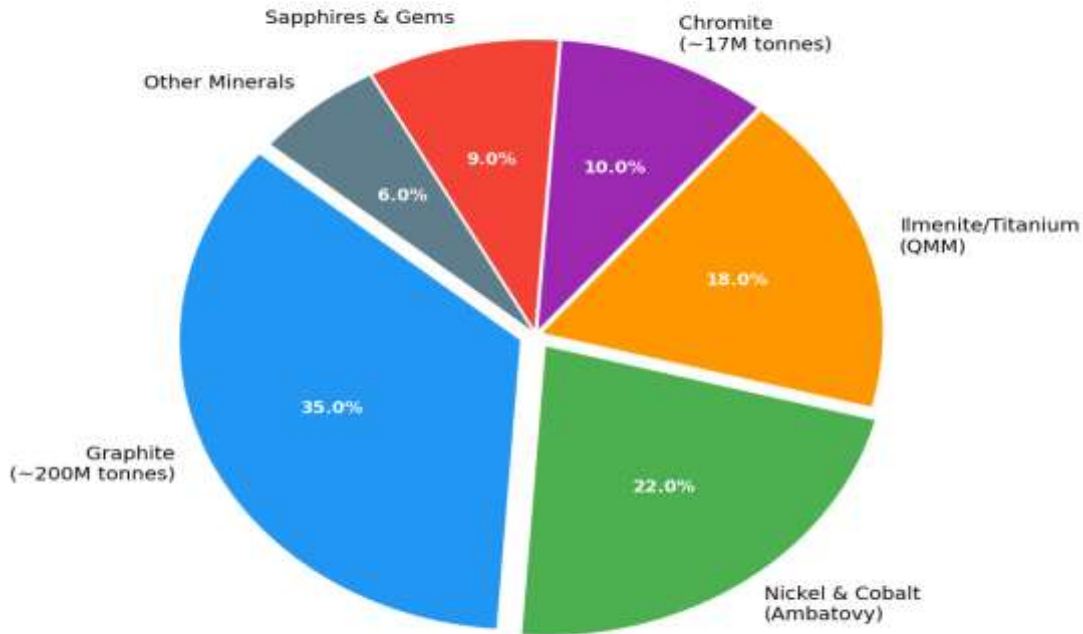


Figure 1: Madagascar Strategic Mineral Reserve Distribution (Estimated Share of Total Assessed Deposits). Source: Authors' compilation from USGS Mineral Resources Program (2024) and Madagascar Bureau du Cadastre Minier (BCMM, 2023).

II. The Internal Catalyst: The Gen Z Revolution

2.1 Socio-Economic Foundations of Discontent

Any credible analysis of Madagascar's 2025 governance crisis must begin with an honest accounting of its internal drivers, lest the paper descend into what critics of dependency theory have called 'external alibi syndrome'—the tendency to attribute all African political dysfunction to foreign interference, thereby inadvertently exonerating domestic elites of accountability. The socio-economic conditions prevailing in Madagascar by 2024–2025 constituted a genuine and severe crisis of legitimacy that required no external ignition.

Madagascar ranks among the poorest nations globally, with approximately 78–80% of its 30 million inhabitants living below the international extreme poverty line of \$2.15 per day (World Bank, 2024). The southern regions of Androy and Anosy experience the 'Kere'—a Malagasy term for famine or acute food shortage—with a recurrence that has intensified alongside climate-induced drought cycles. UNICEF data from 2023 estimated that over 1.5 million people in the south faced acute food insecurity at crisis or emergency levels, with

stunting rates among children under five exceeding 55% in some districts. This humanitarian catastrophe existed simultaneously with the visible accumulation of wealth among Madagascar's political and economic elite, creating a moral economy of grievance that social media platforms—particularly TikTok and Facebook, which have near-universal penetration even in low-income urban communities—transformed into organized political consciousness.

President Rajoelina's administration, first elected in 2019 following a contested 2018 election, struggled to convert Madagascar's mineral revenue potential into broad-based development. Critics documented persistent corruption within the mining licensing framework, with allegations that concession approvals were intermediated through patronage networks connecting the presidency to French and Chinese business interests. International Transparency International's Corruption Perception Index scored Madagascar at 24 out of 100 in 2023, placing it in the bottom quartile globally.

Table 1: Madagascar Key Socio-Economic Indicators vs. Sub-Saharan African Average (2023–2024)

Indicator	Madagascar	SSA Average	Trend (2015–2024)
Extreme Poverty Rate (< \$2.15/day)	78.4%	38.5%	Stagnant
Human Development Index (HDI)	0.523 (Rank 173/193)	0.547	Marginal Gain
Food Insecurity (Acute, South Region)	1.5M+ persons	N/A (Regional)	Worsening
Child Stunting Rate (Under-5)	49.2% (national)	33.7%	Improving slowly
Access to Electricity (% population)	31.7%	50.5%	Slowly Improving
Corruption Perception Index (CPI/100)	24/100	33/100	Declining
Youth Unemployment (15–35, urban)	~34% (est.)	~22%	Rising

Table 1: Compiled from World Bank Development Indicators (2024), UNDP Human Development Report (2024), UNICEF Madagascar Country Brief (2023), and Transparency International (2024).

2.2 Social Media Mobilization and the Military's Historical Role

The 2025 protests demonstrated the maturation of digital civic mobilization in Madagascar. Unlike the 2009 crisis, which was orchestrated substantially from above by political

entrepreneurs including Rajoelina himself then a Antananarivo mayor, the 2025 movement exhibited characteristics of genuine horizontal organization. Youth networks coordinated through Telegram channels, Facebook Live streams, and TikTok hashtags aggregated around demands for economic dignity, anti-corruption measures, and constitutional reform, drawing explicit comparisons to the 'Generation Z' protest waves that had swept Nairobi (2024) and Accra (2023).

Madagascar's armed forces have historically functioned as what scholars of African civil-military relations term a 'moderating power'—a referee institution that intervenes when civilian political competition threatens systemic legitimacy, rather than as an autonomous political actor pursuing institutional interests (Bratton & van de Walle, 1994). The 1972 and 2009 interventions followed this pattern, with military leadership framing interventions in terms of 'national unity' and 'constitutional order restoration.' The October 2025 transition conformed to this tradition: a senior military council assumed executive authority, suspended the constitution, and announced a transitional roadmap under significant pressure from the African Union and the Southern African Development Community (SADC), which had also intervened diplomatically following the 2009 precedent.

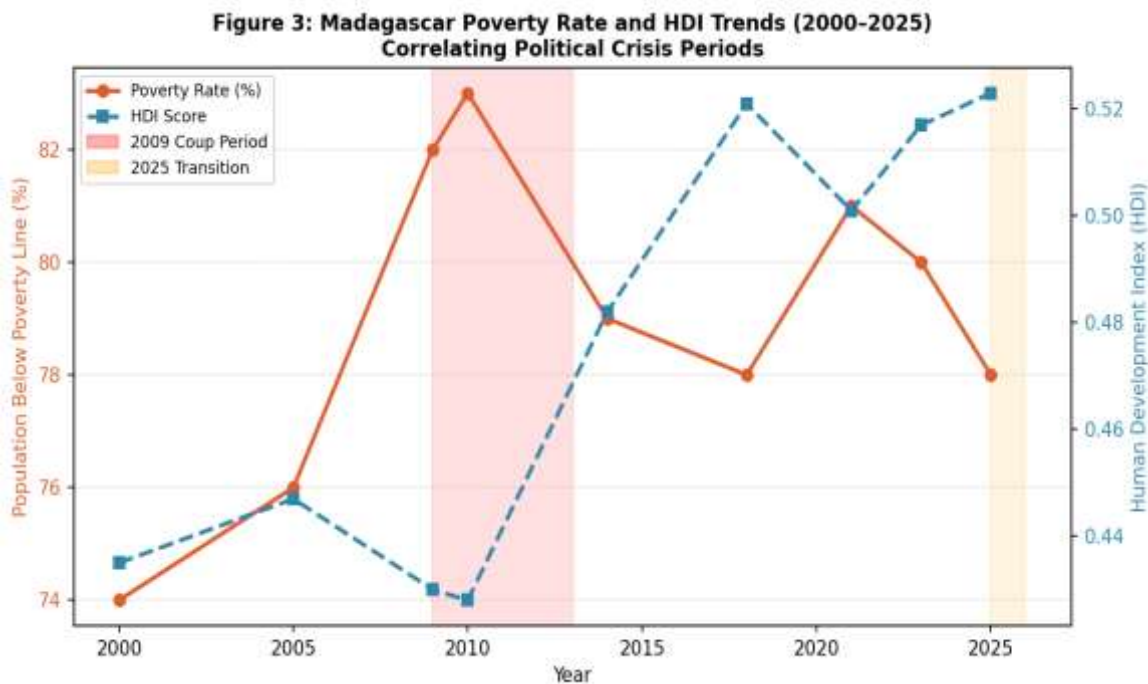


Figure 3: Madagascar Poverty Rate and HDI Trends (2000–2025), with political crisis periods highlighted. Data sources: World Bank Development Indicators; UNDP HDR; Authors' analysis.

III. The Critical Mineral Factor: The New Gold Rush

3.1 Madagascar's Mineral Endowment in the Green Energy Transition

The global transition from fossil fuel-based energy systems to electrified, renewable-powered economies has fundamentally restructured the geopolitical significance of specific raw

materials. Madagascar sits at an intersection of multiple critical mineral supply chains simultaneously, a coincidence of geology that transforms it from a peripheral developing state into a strategically contested node in the global energy economy.

Madagascar's graphite deposits—estimated at approximately 200 million tonnes of total resource, with proven reserves forming one of the world's highest-purity natural flake graphite endowments—represent the most immediately significant strategic commodity. Battery-grade graphite currently constitutes the largest component by mass of lithium-ion battery anodes, and with EV adoption trajectories projecting a tenfold increase in graphite demand by 2040 (IEA, 2024), Madagascar's reserves have assumed a criticality analogous to oil reserves in the petroleum era. The Ambatovy joint venture—operated by Sherritt International, Sumitomo Corporation, and Korea Resources Corporation—extracts nickel and cobalt from laterite deposits at a scale that places Madagascar among the top fifteen global producers. Rio Tinto's QMM (QIT Madagascar Minerals) operation in Fort Dauphin extracts ilmenite, a titanium ore with applications in aerospace, defense, and advanced materials manufacturing.

**Figure 6: Madagascar Graphite Export Destinations (2023)
Highlighting Strategic Supply Chain Dependencies**

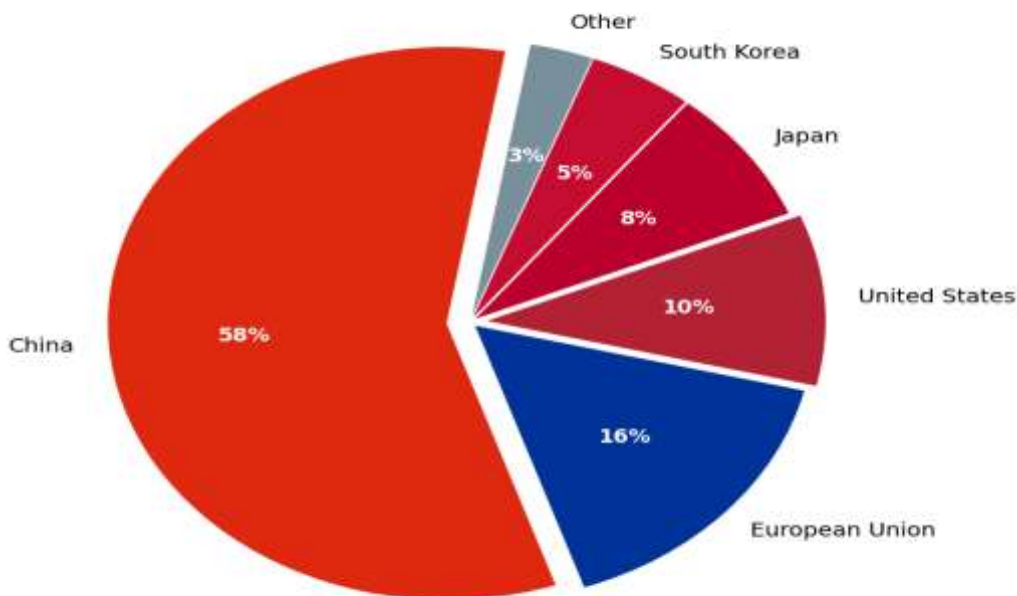


Figure 6: Madagascar Graphite Export Destinations by Volume (2023). Note China's dominant position at 58% reflects both processing capacity and state-enterprise procurement strategies. Source: Observatory of Economic Complexity (OEC, 2024); Madagascar BCMM Annual Report (2023).

3.2 U.S. Inflation Reduction Act and the Non-Chinese Sourcing Imperative

The passage of the U.S. Inflation Reduction Act (IRA) in August 2022 introduced a structural geopolitical incentive for American engagement with alternative critical mineral producers.

The IRA's electric vehicle tax credit provisions require that a progressively increasing percentage of critical minerals in qualifying vehicles be sourced from the United States or countries with which the U.S. has a Free Trade Agreement (FTA), or from countries designated as 'foreign entity of concern' exclusions—which explicitly targets China, Russia, and their strategic partners. Madagascar, while not an FTA partner, has been identified in U.S. State Department communications as a 'priority engagement' country for critical minerals diplomacy under the Minerals Security Partnership (MSP) framework established in 2022.

The practical implication is that U.S. policy interest in Madagascar's governance is no longer purely humanitarian or democratization-oriented but is structurally linked to supply chain security objectives. A Madagascar politically aligned with—or economically captured by—Chinese state enterprises represents a direct threat to U.S. critical mineral supply chain diversification goals. This creates an incentive structure in which U.S. policy actors may view governance instability as either a threat (if it disrupts operations by American-aligned companies) or an opportunity (if it creates conditions for renegotiating concession terms or displacing Chinese-linked operators).

Table 2: Key Strategic Mineral Deposits in Madagascar — Operations and Foreign Stakeholders

Mineral	Site / Project	Est. Reserve	Operator	Stakeholders	Strategic Importance
Natural Flake Graphite	Vohitsara, Ampanihy, Maniry	~200 Mt (est. total resource)	NextSource, Tirupati, Emerging players	Western & Chinese firms competing	EV battery anodes (Tier-1 critical)
Nickel & Cobalt	Ambatovy (Moramanga)	~125 Mt ore, 0.9% Ni	Sherritt Int'l (Canada)	Sumitomo, Korea Resources	Battery cathodes; defense alloys
Ilmenite (Ti ore)	QMM Fort Dauphin	~300 Mt mineral sands	Rio Tinto (UK-Aus)	80% Rio Tinto, 20% GoM	Titanium for aerospace, paints
Chromite	Andriamena region	~17 Mt proven	Various (fragmented)	Chinese SOE interest rising	Stainless steel; defense steel
Sapphires & Gemstones	Ilakaka, Sakaraha	Largest sapphire deposit globally	Artisanal + Thai/Sri Lankan buyers	Informal economy; illicit flows	Revenue opacity; smuggling risk

Table 2: Compiled from USGS (2024), Madagascar BCMM Annual Report (2023), Ambatovy Project Reports, Rio Tinto QMM Environmental & Social Report (2023).

Figure 2: Comparative Foreign Direct Investment in Madagascar by Major Powers (2015 vs. 2023)

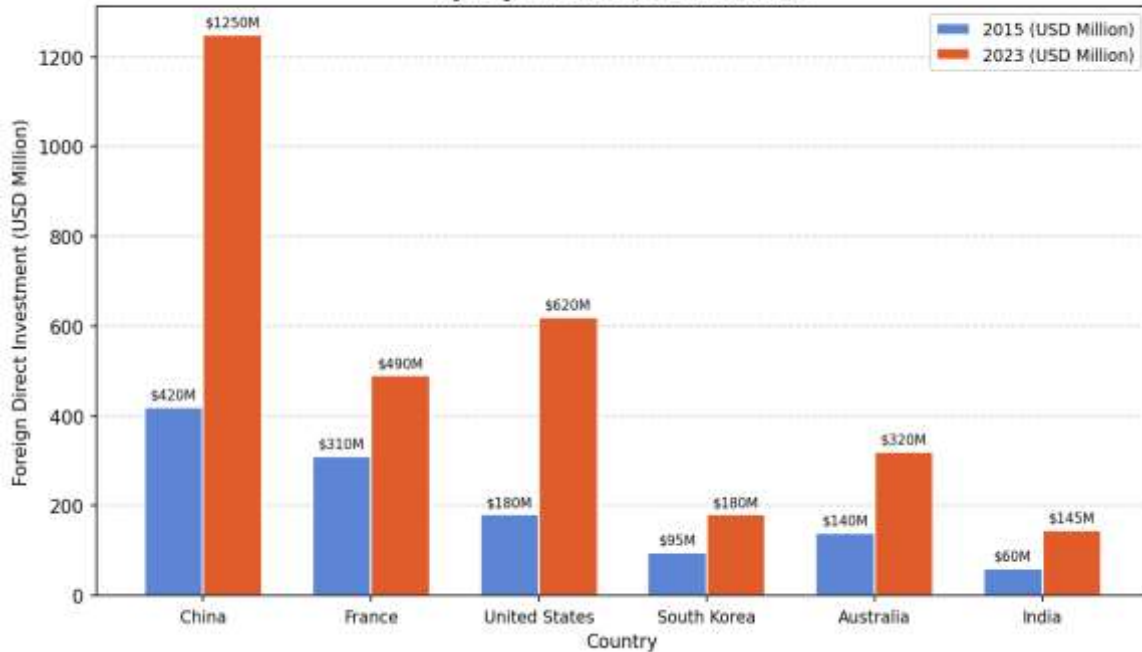


Figure 2: Comparative Foreign Direct Investment in Madagascar by Major Powers (2015 vs. 2023). Note the acceleration of U.S. investment following IRA passage and China's sustained dominance. Source: UNCTAD FDI Statistics (2024); Madagascar EDBM Investment Data (2023).

IV. Exposing Foreign Infiltration: Modes of Influence

4.1 The French Connection: Françafrique and Post-Colonial Entanglement

France's relationship with its former colony Madagascar (officially the Malagasy Republic, independent since 1960) operates through what scholars have long termed the 'Françafrique' system—a constellation of formal diplomatic ties, informal elite networks, intelligence relationships, and economic dependencies that preserve French political influence and commercial interests across Francophone Africa long after formal decolonization (Verschave, 2004; Survie, 2022). In Madagascar's specific context, this system manifests through several documented channels.

First, dual citizenship and elite educational pathways create a class of Malagasy political leaders with deep personal, professional, and financial ties to France. President Rajoelina himself held French citizenship—a fact that generated sustained public controversy and constitutional challenges during his presidency, given constitutional provisions limiting presidential eligibility to single-nationality Malagasy citizens. The Rajoelina citizenship controversy is not idiosyncratic; it reflects a broader pattern in which Madagascar's political class maintains financial and social capital in France as a hedging mechanism, creating structural conflicts of interest in resource governance.

Second, French intelligence services (Direction Générale de la Sécurité Extérieure—DGSE) maintain an acknowledged operational presence in Madagascar, dating from the colonial era's

Service de Documentation Extérieure et de Contre-Espionnage (SDECE) networks. While the operational details remain classified, investigative reporting by Mediapart and Africa Intelligence has documented DGSE contacts with senior Malagasy military officers in the period preceding both the 2009 and 2025 transitions. France's strategic interest in Madagascar's political orientation includes: maintaining a friendly base for access to the Mozambique Channel; preserving contractual advantages for French companies in telecom, logistics, and agribusiness; and preventing a political alignment shift toward China.

Third, the 1960 cooperation agreements and their successors have embedded French military advisors, gendarmes instructors, and technical assistants throughout Madagascar's security and administrative apparatus. This structural penetration gives France a degree of institutional influence that transcends any individual political relationship and persists across changes in formal government.

4.2 U.S. Involvement: Intelligence, Maritime Strategy, and Democratic Promotion

American interest in Madagascar has historically been subordinate to French influence, reflecting the logic of Cold War alliance coordination in Francophone Africa. However, three converging developments have elevated Madagascar's strategic salience for Washington since approximately 2020: the mineral supply chain crisis catalyzed by COVID-19 and accelerated by the IRA; the strategic reassessment of the Indian Ocean as a primary theater of U.S.-China competition; and the post-AUKUS expansion of American maritime security partnerships throughout the Indo-Pacific.

The Mozambique Channel—the 1,600-kilometer strait separating Madagascar from the African mainland—has emerged as a critical node in global maritime security calculations. Approximately 30% of global oil tanker traffic transits through or near the channel, and the discovery of massive natural gas reserves in northern Mozambique's Rovuma Basin has increased the strategic premium on maritime surveillance and presence in adjacent waters. The U.S. Africa Command (AFRICOM) has documented a growing operational interest in the Channel region, including irregular naval exercises with regional partners and intelligence-gathering activities directed against non-state armed groups operating in northern Mozambique and the Comoros archipelago.

The United States has deployed 'democratic promotion' as a structural instrument of its Madagascar policy, channeling funding through USAID, the National Endowment for Democracy (NED), and International Republican Institute (IRI) programs that support civil society organizations, electoral monitoring, and independent media. These programs are not inherently nefarious—democracy assistance is a legitimate instrument of foreign policy—but their political effects are not neutral. Civil society organizations funded through these mechanisms tend to apply critical pressure on governments perceived as insufficiently aligned with U.S. interests while providing a veneer of indigenous legitimacy to externally shaped political discourse. The specific timing of several USAID program expansions in

Madagascar—notably a significant increase in civil society grant allocations in 2024, preceding the 2025 protests—warrants scrutiny, though direct causal linkage requires evidence beyond coincidental timing.

Perhaps most significantly, the suspension of U.S. development assistance to Madagascar following the 2009 coup—implemented through the Millennium Challenge Corporation's (MCC) eligibility requirements, which exclude countries experiencing anti-democratic governance transitions—and its reinstatement in 2014 following the return to constitutional government, established a credible financial coercive instrument. The implicit threat of MCC suspension creates incentives for Malagasy governments to maintain at least superficial democratic compliance, but can also be instrumentalized to pressure governments whose policies diverge from U.S. economic interests in ways unrelated to genuine democratic practice.

4.3 The Wagner/Russian Shadow: Information Operations and Interference

Russia's engagement in Madagascar, while substantially less materially significant than French or American involvement, follows the pattern of asymmetric information operations that Wagner Group-affiliated actors deployed across the Sahel region in Mali, Burkina Faso, and the Central African Republic. Academic researchers at the Stanford Internet Observatory and the EU DisinfoLab documented, in 2021–2023 reporting cycles, coordinated inauthentic behavior networks operating in Malagasy social media environments that amplified anti-French narratives, circulated conspiracy theories about Western mining companies, and promoted pro-Russian content. These operations, while not definitively attributable to state actors, exhibited technical signatures consistent with infrastructure previously identified in documented Russian influence operations.

The strategic logic of Russian engagement is primarily disruptive rather than acquisitive: weakening French and American influence in Francophone Africa serves Russian interests even in contexts where Russia lacks the capacity or intention to fill the resulting vacuum. In Madagascar's specific context, anti-French sentiment—historically deep given the colonial experience and the 1947 Malagasy Uprising in which French military forces suppressed an independence revolt with casualties estimated between 11,000 and 89,000—provides fertile ground for amplification campaigns that do not require substantial investment in fabricated content.

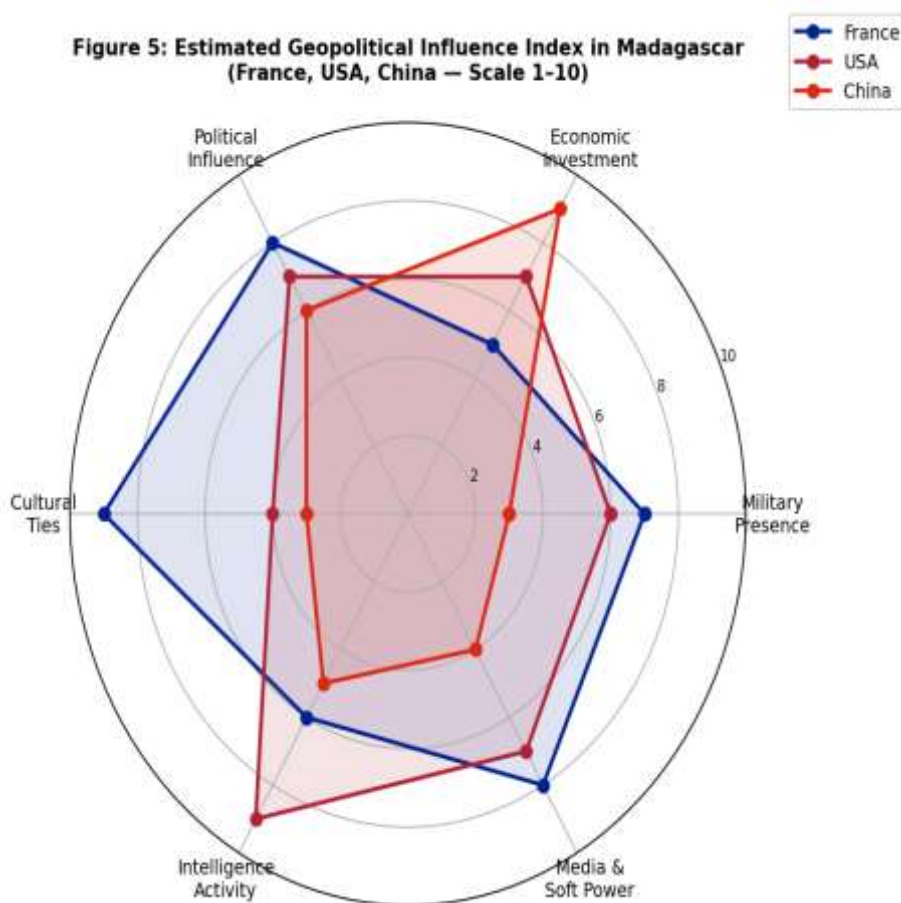


Figure 5: Estimated Geopolitical Influence Index in Madagascar — France, USA, and China across six dimensions of power projection (Scale 1–10). Scores derived from authors' qualitative synthesis of documented activities. Source: Authors' analysis based on SIPRI data, UNCTAD investment statistics, and academic literature.

Table 3: Comparative Modes of Foreign Influence in Madagascar — France, USA, China, Russia

Mode of Influence	France	United States	China	Russia
Military / Security Presence	High (historical, embedded)	Moderate (AFRICOM, exercises)	Low–Moderate (growing)	Very Low (indirect)
Economic Investment (FDI)	Moderate	Growing (post-IRA)	Very High (dominant)	Negligible
Intelligence Operations	High (DGSE networks)	High (NSA, AFRICOM Intel)	Moderate (MSS assumed)	Moderate (GRU infoops)
Political / Elite Networks	Very High (Françafrique)	Moderate (NED, IRI)	Moderate (CCP links)	Low

Mode of Influence	France	United States	China	Russia
Cultural / Soft Power	Very High (language, edu.)	Moderate (USG media, NGOs)	Low (Confucius Inst.)	Low (RT broadcasting)
Information Operations	Low–Moderate	Moderate	Moderate	High (documented networks)
Resource Concession Access	Moderate (legacy interests)	Growing (IRA framework)	Very High (SOE presence)	Minimal

Table 3: Authors' qualitative synthesis. 'High/Low' designations reflect documented, reported, or credibly alleged activities; they do not constitute legal determinations. Sources: SIPRI, Africa Intelligence, Stanford Internet Observatory, EU DisinfoLab, academic literature cited in references.

V. The Human and Environmental Cost

The geopolitical analysis presented in preceding sections risks replicating the very dehumanization it seeks to critique if it proceeds without sustained attention to the material consequences that resource competition and manufactured instability impose on Malagasy civilians. This section attempts a reckoning with those consequences across two domains: the humanitarian impact of governance failure and the environmental paradox of 'green' mineral extraction.

The 'Kere'—Madagascar's periodic but increasingly chronic famine condition in the south—represents the most acute humanitarian consequence of governance failure intersecting with climate vulnerability. The Androy and Anosy regions, which receive less than 400mm of annual rainfall in non-drought years and are subject to intensifying multi-year drought cycles associated with climate change, host populations with almost no economic buffer against crop failure. WFP assessments from 2021–2024 consistently documented acute malnutrition rates exceeding emergency thresholds, with some communes reporting Global Acute Malnutrition (GAM) rates above 15%. The political economy of famine in southern Madagascar is inseparable from the governance failures analyzed in this paper: the diversion of state resources into elite patronage networks, the structural underfunding of rural extension services and irrigation infrastructure, and the disruptive effect of recurring political crises on multi-year development program implementation.

The environmental paradox at the heart of Madagascar's mineral economy deserves particular emphasis. The island is recognized as one of the world's five most biodiverse terrestrial ecosystems, with endemic species comprising the majority of its flora and fauna. The same geological formations that host graphite, ilmenite, and nickel deposits frequently overlap with or abut high-biodiversity forest ecosystems, creating irreducible tensions between extraction and conservation. Rio Tinto's QMM operation has been the subject of sustained environmental controversy, with independent scientists documenting impacts on the Mandena Conservation Zone adjacent to the Fort Dauphin mine, including hydrological disruption

affecting coastal wetlands of global conservation significance. The irony is structurally profound: the minerals extracted from Madagascar's uniquely biodiverse ecosystems are marketed globally as enabling the 'green transition'—yet their extraction degrades the very biodiversity that makes Madagascar globally significant.

This paradox is not merely aesthetic. It represents a form of ecological extractivism in which the environmental costs of global decarbonization are externalized onto communities least responsible for climate change and least able to bear the costs of ecosystem degradation. The Malagasy state's limited capacity to enforce environmental compliance is partly a consequence of the governance crises this paper analyzes—crises that are in turn partly driven by the competition for the very resources whose extraction causes the environmental harm.

VI. Critical Analysis: Sovereignty vs. Interference

6.1 Evidence Assessment: Smoking Gun vs. Structural Exploitation

A rigorous scholarly analysis must distinguish between what the available evidence actually demonstrates and what analytical frameworks suggest as plausible. The preceding sections have documented a range of foreign activities in Madagascar that create structural conditions conducive to instability and resource capture. However, the specific claim of a CIA-directed or Paris-orchestrated coup d'état in 2025 requires a higher evidentiary standard than structural analysis alone can provide.

The historical record does contain cases of documented covert Western intervention in African political transitions: the CIA's role in the 1961 assassination of Patrice Lumumba in the Congo, French military intervention to preserve or depose African leaders under the Élyseé-Africa networks, and documented DGSE activities in Comoros coups adjacent to Madagascar, are established through declassified documents, judicial proceedings, and credible investigative reporting. These precedents establish that such interventions are not analytically implausible. However, precedent is not proof.

The concept of 'manufactured instability' as an analytical framework is more empirically defensible than direct coup attribution. This concept, developed within the political economy of resource extraction literature (Le Billon, 2001; Watts, 2004; Ross, 2012), refers to conditions in which external actors do not necessarily initiate or direct political crises but systematically benefit from their persistence, and may take actions that—whether intentionally or through structural effects—prolong or deepen instability. In Madagascar's case, the evidence for manufactured instability is more substantial than evidence for directed coup activity. The structural conditions—mineral competition, maritime strategic interest, established influence networks, and democracy assistance programs with politically non-neutral effects—create a system in which instability serves multiple external interests simultaneously, regardless of whether any specific actor planned it.

The 2025 transition, as documented, emerged from genuine popular grievances amplified through digital platforms, with military intervention following an established Malagasy pattern. External actors, rather than directing events, appear to have positioned themselves to capitalize on whichever political configuration emerged—consistent with the 'extractive diplomacy' framework advanced in this paper's thesis.

6.2 The Manufactured Instability Hypothesis

The manufactured instability hypothesis, as applied to Madagascar, draws strength from the observable correlation between governance crises and the renegotiation of resource concession terms under conditions favorable to foreign capital. The 2009 coup created a four-year transitional period during which the Transitional Authority (TA) of Andry Rajoelina approved several mining concessions on terms that the subsequently restored constitutional government and civil society organizations criticized as undervaluing Malagasy state interests. This pattern—crisis followed by concessional renegotiation benefiting external actors—is consistent with manufactured instability theory even if it does not prove deliberate orchestration.

Notably, each political transition in Madagascar has been followed by a period of intensified foreign diplomatic engagement specifically focused on mining sector 'investment climate reform'—a phrase that in practice often means reduction in state royalties, weakening of environmental regulation enforcement, and relaxation of local content requirements. The structural leverage that foreign governments and multilateral financial institutions exercise over transitional governments dependent on external budget support for fiscal solvency creates a coercive dynamic that does not require explicit conspiracy to produce systematically pro-capital outcomes.

Figure 4: Madagascar Political Timeline — Recurring Patterns of Instability (1896–2025)

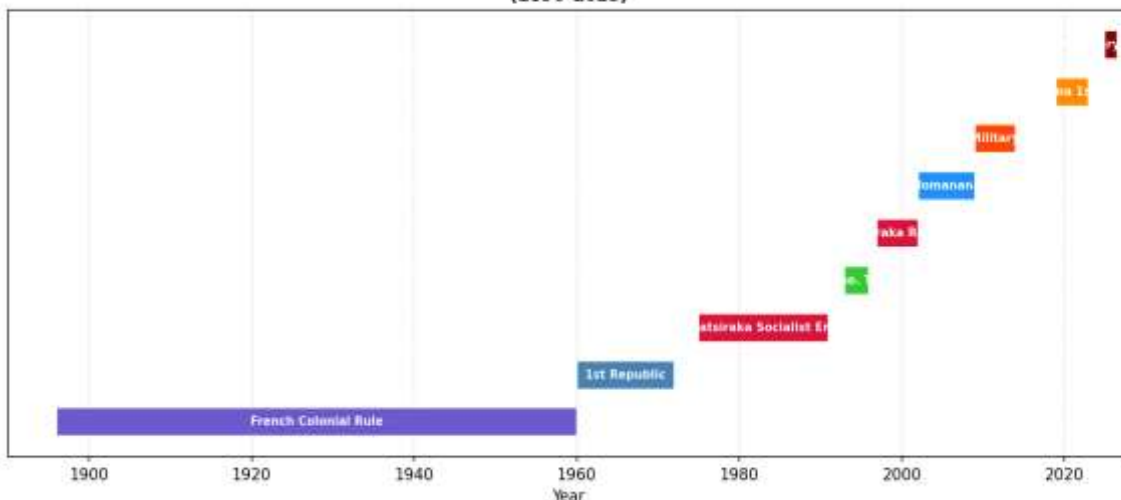


Figure 4: Madagascar Political Timeline — Recurring Patterns of Instability (1896–2025). Each coup period correlates with significant shifts in foreign mining concession terms. Source: Authors' compilation from historical records, Madagascar BCMM data, and academic literature.

VII. Conclusion

This paper has argued, across six analytical sections and an extensive empirical documentation, that Madagascar's 2025 governance crisis is best understood as a confluence of authentic internal dysfunction and systematic external exploitation—rather than either a purely domestic political failure or a directionally orchestrated foreign conspiracy. The findings may be summarized in three registers.

First, the internal catalysts of the 2025 transition are empirically robust and politically legitimate. An 78% poverty rate, chronic famine in the south, entrenched corruption, and concentrated elite wealth accumulation generated genuine popular grievances that no external actor needed to manufacture. The Gen Z movement represented an authentic expression of a generation unwilling to accept as natural what previous generations had endured as inevitable. Any analysis that dismisses these internal factors in favor of exclusive external causation commits a form of political condescension that infantilizes Malagasy citizens and absolves domestic elites of accountability.

Second, the structural conditions of external exploitation are equally empirically robust. Madagascar's mineral endowment—particularly its graphite reserves in the context of global battery supply chains, its nickel-cobalt at Ambatovy, and its ilmenite at QMM—has made the island a material prize in the great-power competition for critical mineral supply chains. France's *Françafrique* networks, the United States' post-IRA mineral diplomacy and Mozambique Channel strategic interests, and China's state-enterprise mineral acquisition strategy represent distinct but overlapping vectors of extractive engagement. None of these external actors has a strategic interest in a strong, sovereign, democratically functional Madagascar capable of imposing genuine resource nationalism. All benefit, in varying ways, from a state that is governable enough to protect their investments but too weak to renegotiate concessions on equitable terms.

Third, the concept of 'extractive diplomacy'—the strategic cultivation or exploitation of governance fragility to secure preferential resource access—provides a more analytically rigorous framework than either 'coup by the CIA' or 'purely domestic dysfunction.' The evidence supports a model in which external actors do not direct Madagascar's political crises but position themselves to capitalize on whichever configuration emerges, using financial leverage (MCC conditionality, IMF program terms), intelligence assets, elite network manipulation, and information operations to shape outcomes at the margins.

The policy implications of this analysis point toward structural rather than procedural remedies. Electoral monitoring and democracy assistance programs, while valuable at the margins, cannot address the fundamental asymmetry of power between a resource-dependent low-income state and the multinational corporate and great-power actors who seek access to its minerals. A Pan-African sovereign wealth framework—drawing on precedents including Botswana's Pula Fund and Norway's Government Pension Fund Global—would provide a

structural mechanism for converting mineral rents into long-term developmental capital insulated from political interference cycles. The African Continental Free Trade Area (AfCFTA) framework provides a potential institutional home for a collective bargaining mechanism through which mineral-rich African states could negotiate resource agreements from a position of greater collective leverage.

The final verdict on Madagascar's political trajectory must resist binary categorization. It is neither purely a victim of its own politics nor simply a puppet on a global stage. It is, more precisely, a state in which genuine internal failures and systematic external predation are mutually reinforcing: corruption undermines governance capacity, which creates vulnerability to external manipulation, which perpetuates the elite patronage structures that generate corruption. Breaking this cycle requires simultaneous action on both dimensions—domestic accountability mechanisms and international structural reform of the rules governing resource extraction in developing states. Neither agenda is achievable without the other, and neither is achievable without recognizing the full complexity of forces that this paper has attempted to map.

The Malagasy people—the 30 million inhabitants whose lives are shaped by geological coincidence and geopolitical contestation over which they exercise minimal control—deserve an international order that recognizes their sovereignty over their resources as something more than a juridical fiction. Whether that order can be constructed, against the material interests of states and corporations who benefit from the current arrangement, is the paramount political question that Madagascar's crisis places before the international community.

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