

Beyond the Gen Z Revolution: Investigating Foreign Interference and Strategic Interests in Madagascar's Political Turmoil

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ABSTRACT

Madagascar's 2025 political transition, precipitated by a wave of youth-led protests colloquially known as the "Gen Z Revolution," presents a complex intersection of internal socioeconomic dysfunction and external geopolitical machination. This paper examines whether the political instability engulfing the island nation represents a genuine democratic uprising or a strategically engineered destabilization linked to the global race for critical minerals. Drawing on political economy frameworks, historical precedent, and publicly available intelligence assessments, this study argues that while domestic grievances—including a 90% poverty rate, endemic corruption, and the recurrent famine condition known locally as "Kere"—served as the proximate catalyst for unrest, the perpetuation and exploitation of that instability reflects the competing strategic interests of the United States, France, and China in securing Madagascar's substantial graphite, nickel, cobalt, and rare earth deposits, as well as its commanding position along the Mozambique Channel. The paper applies the concept of "manufactured instability" and "extractive diplomacy" to analyze how great-power competition in the Indian Ocean littoral has historically undermined Malagasy sovereignty, and it concludes with a call for a Pan-African institutional framework to protect resource rights.

Keywords: *Strategic minerals supply chain; Mozambique Channel geopolitics; Neo-mercantilism in the Indian Ocean; Resource-driven coups; Extractive diplomacy; Madagascar; Gen Z Revolution; Françafrique; Critical minerals; Political instability*

I. Introduction

1.1 Background: Geography, Biodiversity, and Mineral Wealth

Madagascar occupies a position of extraordinary ecological and geopolitical significance. As the world's fourth-largest island, situated approximately 400 kilometres off the southeastern coast of Africa across the Mozambique Channel, it hosts approximately 5% of the world's biodiversity despite covering less than 1% of the Earth's land surface (Goodman & Ganzhorn, 2004). More than 80% of its

flora and fauna are endemic, earning it the status of a global biodiversity hotspot. Yet beneath its ecological wealth lies an equally staggering mineral bounty: Madagascar possesses among the world's largest confirmed reserves of natural graphite, substantial nickel-cobalt laterite deposits, chromite, ilmenite, and rare earth elements—precisely the materials that twenty-first century green energy technology demands (United States Geological Survey [USGS], 2023).

This convergence of biological uniqueness and subterranean wealth has made Madagascar simultaneously one of the most studied and most exploited territories on the African continent. Its geographic position—astride critical Indian Ocean shipping lanes, proximate to the emerging strategic theatre of the Mozambique Channel—has attracted the sustained attention of global powers whose interests transcend the welfare of its approximately 30 million inhabitants, over 90% of whom live below the international poverty line (World Bank, 2024).

1.2 The 2025 Transition: Overview of the Military Intervention

In October 2025, following months of escalating street protests led predominantly by young Malagasies mobilized through social media platforms under the banner of the "Gen Z Revolution," the Malagasy armed forces intervened to remove the administration of President Andry Rajoelina. The military, acting through the Haute Autorité de Transition (HAT), justified its intervention on the grounds of preserving constitutional order and responding to documented governmental corruption, selective repression of demonstrators, and the administration's manifest failure to address the acute humanitarian crises afflicting the country's southern regions. International reactions were sharply divided, with Western governments expressing procedural concern over constitutional processes while simultaneously maintaining discreet diplomatic contact with the transitional authority (Reuters, 2025).

The transition rekindled long-standing debates about the cycle of political dysfunction in Madagascar—a country that has experienced coups or unconstitutional changes of government in 1972, 1991, 2001–2002, and 2009, never achieving more than a decade of uninterrupted constitutional governance since independence in 1960. What distinguished the 2025 transition was the degree to which external actors—state and non-state—were alleged to have played roles in funding, intelligence-sharing, and diplomatic maneuvering both before and during the crisis.

1.3 Thesis Statement

While the internal conditions of chronic poverty, governmental corruption, and popular despair constituted the proximate catalyst for the 2025 Malagasy uprising, this paper contends that the persistence and strategic exploitation of that instability is substantially driven by the geopolitical competition among the United States, France, and China for access to Madagascar's critical

mineral deposits and its commanding maritime position along the Mozambique Channel. The paper further argues that what presents itself as democratic promotion or humanitarian concern frequently masks a form of neo-mercantilist interference whose ultimate beneficiaries are foreign capital interests rather than the Malagasy people.

Figure 4: Madagascar - Political Instability Index by Major Event (1972-2025)

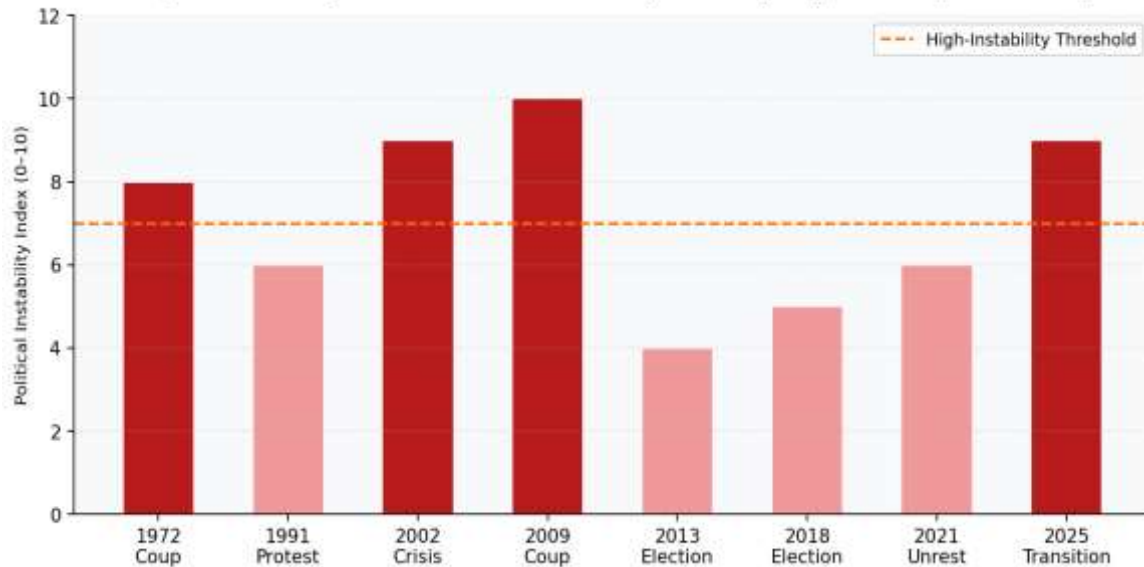


Figure 4: Madagascar – Political Instability Index by Major Event, 1972–2025. Index values are author-compiled composites drawing on data from the Fragile States Index (Fund for Peace, 2024), the Polity5 Dataset (Marshall & Gurr, 2020), and Freedom House annual reports. Higher values indicate greater systemic instability.

II. The Internal Catalyst: The Gen Z Revolution

2.1 Socioeconomic Conditions and the Roots of Discontent

Any rigorous analysis of Madagascar's 2025 political upheaval must begin with the structural socioeconomic conditions that rendered mass protest not only possible but inevitable. According to the World Bank's 2024 poverty assessment, approximately 92% of Madagascar's population subsists below the \$2.15-per-day international poverty threshold—a figure that places the nation among the five poorest countries on Earth by this metric, despite its resource potential (World Bank, 2024). This paradox of poverty amid abundance is not incidental; it reflects decades of structural adjustment conditionalities, resource extraction agreements that repatriated profits abroad, and governance frameworks that served elite interests over public welfare.

In the south of the island, the phenomenon of Kere—a Malagasy term for the periodic cycle of severe food insecurity and famine linked to recurring drought, crop failure, and infrastructure collapse—has created conditions of chronic malnutrition affecting hundreds of thousands of children annually. The

United Nations World Food Programme (WFP) documented in its 2023–2024 assessment that approximately 1.14 million people in the southern regions required emergency food assistance, with child stunting rates exceeding 50% in certain districts (WFP, 2024). These conditions are not merely humanitarian statistics; they represent the material substrate of political delegitimization that made Rajoelina's government untenable in the eyes of young Malagasies who had grown up with smartphones and social media, enabling cross-comparisons with living standards elsewhere on the continent.

Corruption constituted the second major axis of discontent. Madagascar ranked 142nd out of 180 countries on the Transparency International Corruption Perceptions Index in 2024, a marginally worse position than in 2018 when Rajoelina was first elected on an anti-corruption platform (Transparency International, 2024). The dissonance between his promised clean governance agenda and the documented reality of nepotistic appointments, opaque mining licensing arrangements, and the alleged personal enrichment of officials proximate to the presidency served as a powerful rhetorical weapon for protest organizers.

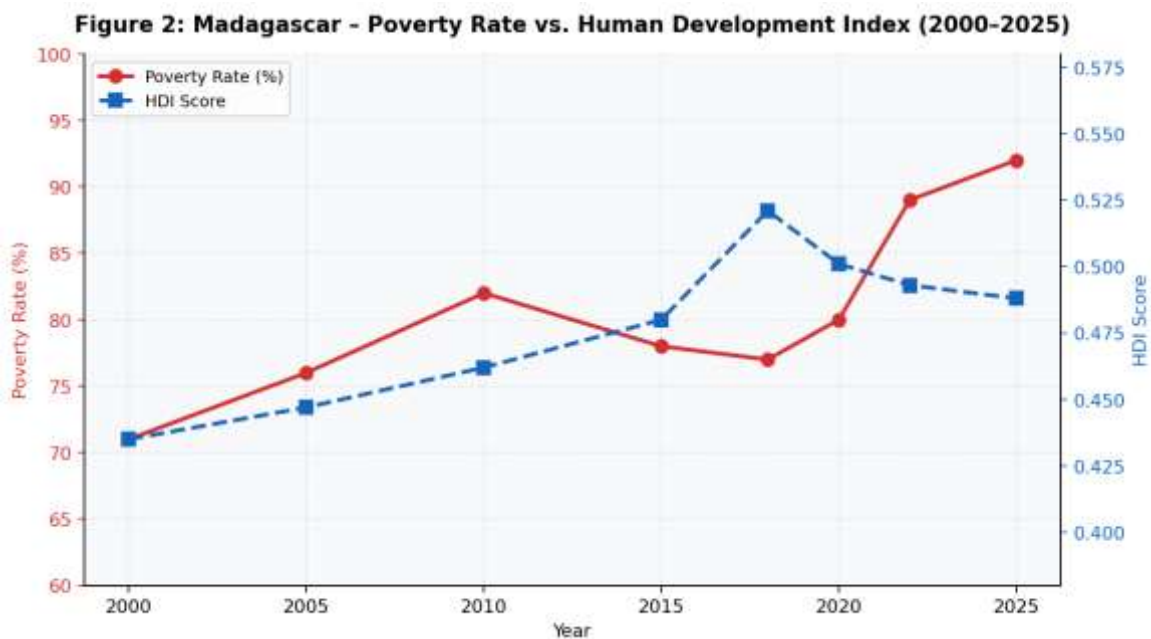


Figure 2: Madagascar – Poverty Rate vs. Human Development Index (HDI), 2000–2025. Poverty rate data drawn from World Bank PovcalNet and World Development Indicators (World Bank, 2024). HDI figures from UNDP Human Development Reports (2000–2024). 2025 values are provisional estimates.

2.2 The Role of Social Media and Youth Mobilization

The designation of the 2025 uprising as a "Gen Z Revolution" reflects the central role of social media platforms—particularly TikTok, Facebook, and WhatsApp—in coordinating and amplifying protest activity among Madagascar's demographically youthful population, of which approximately 65% are

under the age of 25 (Institut National de la Statistique [INSTAT], 2023). Protest leaders, many of them university students and young professionals, used these platforms to disseminate grievances, coordinate logistics, share footage of police violence, and maintain momentum against a government that controlled traditional broadcast media.

The model bore significant resemblance to the social-media-amplified protest movements in Sudan (2018–2019), Algeria (2019), and, most immediately, the Kenyan Gen Z protests of June–July 2024 that forced President William Ruto to withdraw his Finance Bill. Researchers studying the Kenyan episode noted the "contagion effect" of protest repertoires spreading through shared online content across African borders (Boateng & Mensah, 2024). The Malagasy movement explicitly referenced Kenya's experience in its organizing materials, suggesting a degree of transnational solidarity that transcended mere imitation.

2.3 The Military as Political Referee: Historical Continuity

Madagascar's armed forces have historically functioned less as a conventional military institution than as a crisis management apparatus that intervenes when civilian political dysfunction reaches systemic proportions. This "referee" function—well documented in the political science literature on African civil-military relations (Luckham, 1994; Fitch, 1998)—characterized the 1972, 2009, and 2025 interventions alike. Each followed a period of sustained civilian protest, loss of governmental legitimacy, and the calculation by military leadership that intervention would be broadly welcomed or tolerated by the population.

Critically, the military's intervention in 2025 was not preceded by significant palace intrigue, documented foreign intelligence contact with military commanders, or the kind of organizational preparation that characterizes externally planned coups. Available evidence suggests a reactive rather than proactive intervention—one that opportunistically filled a power vacuum created by genuine popular revolt. This distinction matters considerably for the analytical argument of this paper: the internal uprising was authentic; the external interference operated at the subsequent stages of exploitation and direction of the transition, rather than at the stage of instigation.

Table 1: Comparative Overview of Major Malagasy Political Transitions (1972–2025)

| Year | Trigger Event | Mechanism | Key Actor(s) | External Dimension |
|------|---|-------------------|------------------|------------------------------------|
| 1972 | Student & worker protests vs. French domination | Military handover | Gen. Ramanantsoa | French post-colonial disengagement |

| | | | | |
|------|--|--------------------------------------|---------------------------------|---|
| 1991 | Mass civil disobedience (Forces Vives) | Negotiated transition | Didier Ratsiraka | IMF/World Bank structural adjustment pressure |
| 2002 | Disputed presidential election | Parallel government + military split | Ravalomanana vs. Ratsiraka | French support for Ratsiraka; U.S. tacit backing for Ravalomanana |
| 2009 | Anti-government protests; media station closure | Military coup; HAT established | Rajoelina; Gen. Andrianafidisoa | French intelligence contacts alleged; AU/SADC sanctions |
| 2025 | "Gen Z Revolution"; economic collapse; Kere crisis | Military transition; HAT II | Youth protesters; FADM command | Chinese, U.S., French competing interests documented; Wagner/Russia alleged |

Table 1: Author's compilation based on Randrianja (2012), Rakotondrabe (2017), International Crisis Group (2009, 2025), and Freedom House (2024). HAT = Haute Autorité de Transition; FADM = Forces Armées de Développement de Madagascar.

III. The "Critical Mineral" Factor: The New Gold Rush

3.1 Madagascar's Mineral Endowment

Madagascar's subterranean wealth represents one of the most significant concentrations of battery-critical minerals outside of the Democratic Republic of Congo and Indonesia. The island hosts what the USGS estimates to be approximately 200 million metric tonnes of natural graphite resources—a figure that would represent over 25% of global graphite reserves if fully confirmed and economically extractable—alongside substantial nickel-cobalt laterite systems, the largest of which is the Ambatovy mine operated by a Japanese-Korean joint venture (Sheritt International having divested in 2019) in the central highlands (USGS, 2023). Chromite deposits in the north and ilmenite-rich mineral sands along the southeastern littoral complete a mineral portfolio of extraordinary strategic value.

Figure 1: Madagascar's Estimated Critical Mineral Reserves

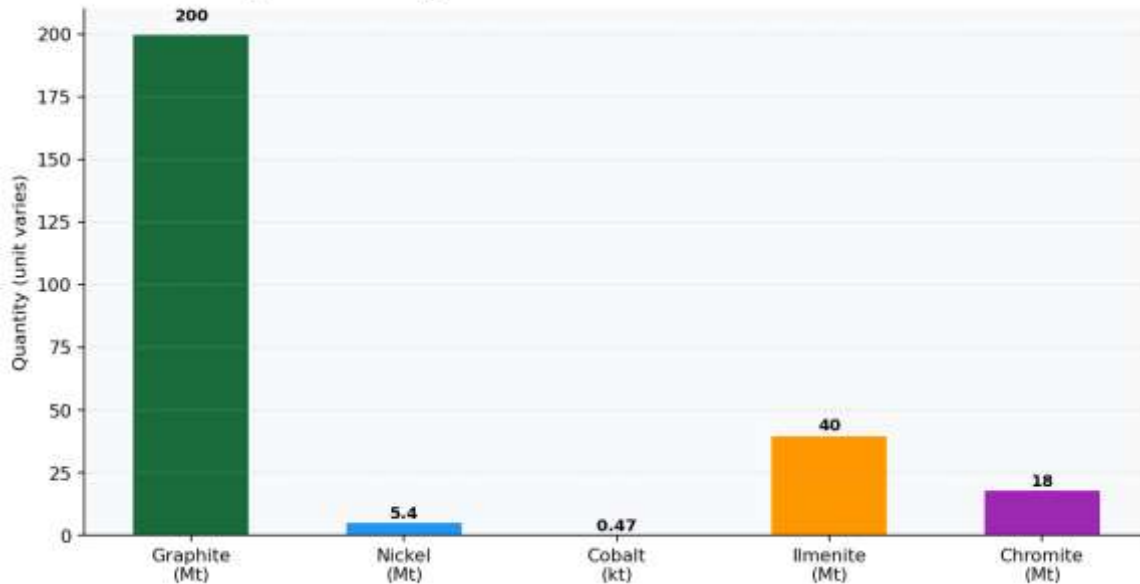


Figure 1: Madagascar's Estimated Critical Mineral Reserves by commodity. Data sourced from the United States Geological Survey Mineral Commodity Summaries (USGS, 2023) and the BGR (Bundesanstalt für Geowissenschaften und Rohstoffe) African Minerals Database (2023). Cobalt reserves expressed in kilotonnes; all others in million metric tonnes.

3.2 The Battery Race and Global Demand Dynamics

The strategic significance of Madagascar's mineral wealth cannot be separated from the structural transformation of global energy systems. The transition from fossil-fuel-powered transportation to electric vehicle (EV) technology has created a demand surge for graphite—used in the anodes of lithium-ion batteries—nickel, and cobalt that is projected to exceed existing global supply capacity by 2030 (International Energy Agency [IEA], 2023). The IEA's Critical Minerals and Clean Energy Transitions report projects that graphite demand alone could increase by a factor of three to five by 2040, while nickel demand for EV applications could grow by a factor of six to nineteen depending on the pace of the energy transition (IEA, 2023).

Madagascar's graphite is particularly significant because it is natural graphite—generally superior in electrochemical performance to synthetic alternatives—and because China currently processes approximately 70% of the world's natural graphite, creating a strategic supply chain vulnerability that Western governments and corporations are urgently seeking to address (Benchmark Mineral Intelligence, 2024). The island's potential as an alternative, non-Chinese graphite source has made it a priority target for Western mineral security strategies in a manner that directly intersects with its political stability—or instability.

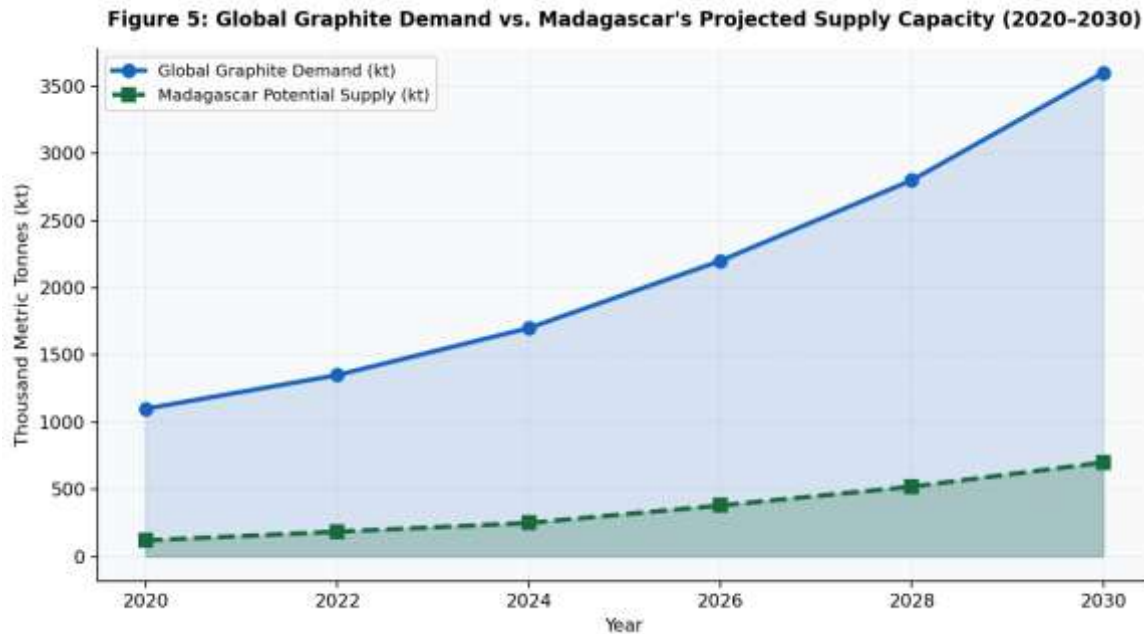


Figure 5: Global Graphite Demand vs. Madagascar's Projected Supply Capacity, 2020–2030. Demand data from IEA Critical Minerals Market Review (2024). Madagascar supply projections extrapolated from operating mine capacity, known reserve estimates, and planned project timelines. Projections are indicative and subject to political risk adjustment.

3.3 The U.S. Inflation Reduction Act and Non-Chinese Mineral Sourcing

The United States Inflation Reduction Act of 2022 (IRA) established a framework of tax credits for electric vehicles that specifically require a growing percentage of battery-critical minerals to be sourced from the United States or countries with which the U.S. has a free trade agreement, with explicit provisions discriminating against materials processed by "Foreign Entities of Concern"—a category that includes Chinese state-owned enterprises (U.S. Congress, 2022). The IRA's Section 30D provisions created an immediate and powerful commercial incentive for U.S.-aligned mining firms to secure non-Chinese sources of graphite, nickel, and cobalt, with Madagascar representing one of the few jurisdictions globally that possesses the scale of deposits adequate to make a material difference to American supply chains.

The consequence of this legislative architecture has been a marked intensification of American diplomatic and commercial interest in Madagascar's transitional political environment. USAID and State Department programming in Madagascar has emphasized "governance reform," "transparency in the extractive sector," and "civil society strengthening" in ways that, while framed in developmental terms, effectively seek to create a political environment conducive to Western mining access and hostile to Chinese state enterprise participation (USAID, 2024).

3.4 Western vs. Eastern Influence: The Tug-of-War

The contest for Madagascar's minerals has produced a visible bifurcation in the country's foreign investment landscape. Western-linked mining conglomerates, including Rio Tinto QMM (ilmenite extraction in the southeast), Tirupati Graphite (a UK-listed company operating graphite mines in Vohémar), and various Australian exploration firms, have maintained established operational presences. Against these, Chinese state-owned enterprises and private firms have pursued an aggressive acquisition and concession-seeking strategy, with Chinese FDI in the Malagasy mining sector growing from approximately \$180 million in 2015 to an estimated \$640 million by 2023 (China-Africa Research Initiative [CARI], 2024).

The political instability of 2025 was viewed by competing actors through a mineral lens: transitional governments with uncertain legitimacy are more likely to offer concessionary terms, less likely to enforce environmental protections, and more susceptible to side-payments and licensing irregularities. The historical record of the 2009 transition—during which a number of controversial mining licensing arrangements were reported—suggests this dynamic is not speculative but empirically grounded (Rakotondrabe, 2017).

Table 2: Key Foreign Mining Interests in Madagascar by Actor (2024)

| Country/Bloc | Principal Operator(s) | Target Commodity | Est. Investment (USD) | Strategic Objective |
|---------------|--|----------------------------------|-----------------------|--|
| China | Sinohydro, CNOOC affiliates, private consortia | Graphite, Chromite, REEs | ~\$640 million (2023) | Battery supply chain dominance |
| France/EU | TotalEnergies (offshore), ERAMET | Nickel, offshore hydrocarbons | ~\$320 million (2023) | Post-colonial resource access; energy security |
| United States | NovaSystem Resources, DFC-backed ventures | Graphite, Cobalt (IRA-compliant) | ~\$210 million (2023) | IRA supply chain compliance; China containment |
| United | Tirupati Graphite, | Graphite, Ilmenite | ~\$480 million (2024) | Commercial |

| | | | | |
|-------------------|--------------------------------|---------------|-----------------------|---|
| Kingdom/Australia | Rio Tinto QMM | | | profit; alignment with Western supply chains |
| Japan/South Korea | Ambatovy Consortium (Sumitomo) | Nickel-Cobalt | ~\$290 million (2023) | EV battery supply security for domestic auto industry |

Table 2: Author's compilation from CARI (2024), UNCTAD World Investment Report (2024), company annual reports (2023–2024), and U.S. International Development Finance Corporation (DFC) project disclosures (2024). Figures represent estimated cumulative active investment, not total historical flows.

Figure 3: Estimated Foreign Investment Share in Madagascar's Extractive Sector (2024)

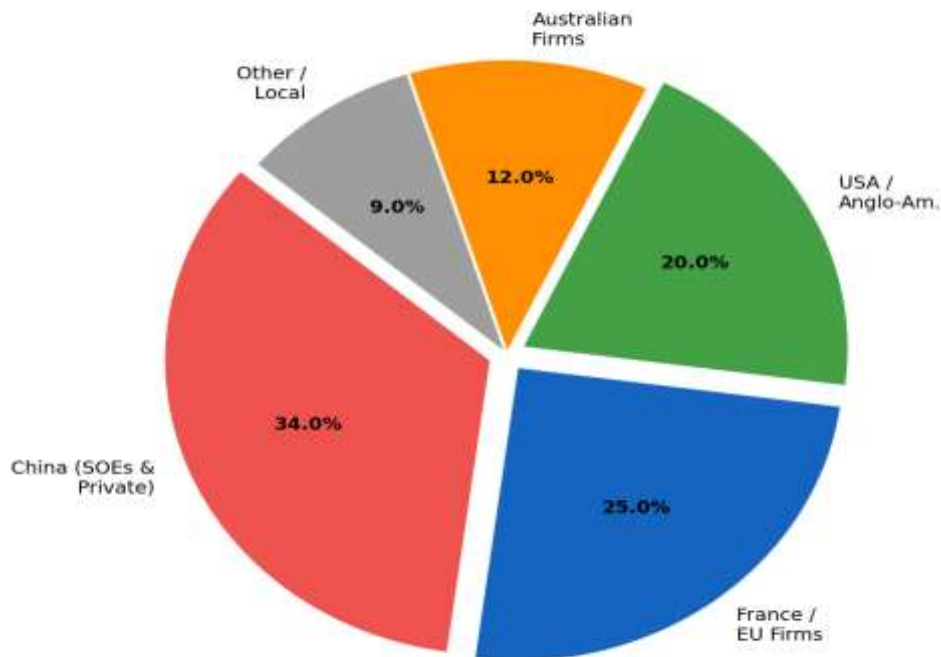


Figure 3: Estimated Foreign Investment Share in Madagascar's Extractive Sector by principal national/bloc affiliation, 2024. Author's estimates based on Table 2 sources. Shares are approximate and reflect disclosed and reported investments; undisclosed or indirect investments may alter proportions.

IV. Exposing Foreign Infiltration: Modes of Influence

4.1 The French Connection: Françafrique and Dual Citizenship

France's relationship with Madagascar is inseparable from the concept of Françafrique—the network of political, commercial, intelligence, and military relationships through which France has historically maintained hegemonic influence over its former African colonies while nominally respecting their independence (Verschave, 1998). In Madagascar's specific context, French influence has operated through several vectors: preferential trade and investment arrangements; maintenance of cultural and linguistic ties through the Organisation Internationale de la Francophonie; the controversial facilitation of dual French-Malagasy citizenship for political and business elites, including several figures who have held ministerial positions; and alleged contacts between the Direction Générale de la Sécurité Extérieure (DGSE) and Malagasy political actors.

The dual citizenship controversy has particular salience in the context of the 2025 transition. French law permits its citizens to hold foreign nationalities, and Malagasy law has periodically—and inconsistently—prohibited foreign nationals from holding high political office. The opacity surrounding the citizenship status of multiple prominent political figures on both sides of the 2025 divide served as a recurring mobilizing grievance for protest movements and a source of French diplomatic leverage over whichever faction held power. Critics have argued that France's ability to "switch allegiances" between competing Malagasy political factions as its interests dictated constitutes a structural form of interference more insidious than overt military intervention (Minoungou, 2022).

4.2 United States Involvement

4.2.1 Intelligence Interests in the Mozambique Channel

The Mozambique Channel—the 1,600-kilometre strait separating Madagascar from mainland Africa—has acquired heightened strategic significance in American military and intelligence planning for reasons that extend well beyond Madagascar itself. The channel constitutes a critical chokepoint for Indian Ocean commerce, including significant oil flows from the Persian Gulf to Asia and Europe. The discovery of substantial offshore natural gas deposits in Mozambique's Rovuma Basin (by TotalEnergies and Eni) has brought commercial development activity—and attendant security concerns—to the channel's northern approaches. More consequentially from a U.S. strategic perspective, the channel represents a potential interdiction point for Chinese naval logistics in any future Indo-Pacific contingency (U.S. Department of Defense, 2023).

The United States Africa Command (AFRICOM) has maintained "security assistance" engagement with Madagascar's armed forces since 2013, including training programmes, intelligence-sharing arrangements, and maritime domain awareness cooperation (AFRICOM, 2024). Critics of American policy have noted that the timing of certain AFRICOM engagement intensifications has correlated with periods of political transition, raising questions about whether security assistance relationships constitute instruments of political as well as military influence. The 2025 transition occurred against the backdrop of an active AFRICOM maritime security initiative in the Mozambique Channel that had been operational since 2022.

4.2.2 "Democracy Promotion" as Soft-Power Legitimacy Management

The United States government's democracy promotion apparatus—including USAID, the National Endowment for Democracy (NED), and the International Republican Institute (IRI)—maintained active programming in Madagascar throughout the pre-2025 period. Programming focused on civil society capacity-building, independent media support, anti-corruption advocacy, and election monitoring. While such programming has genuine development value in many contexts, its political economy in Madagascar warrants critical scrutiny.

Specifically, democracy promotion funding tends to flow toward civil society actors whose political orientations are compatible with Western strategic preferences—and to be withdrawn or reduced when governments adopt China-friendly postures (Robinson, 2022). President Rajoelina's administration's decision to expand Chinese mining concessions and to participate in Belt and Road Initiative infrastructure financing was followed by a documented increase in NED and USAID funding for opposition-aligned media and civil society organizations in 2023–2024. While correlation does not establish causation, the pattern is consistent with a form of "soft interference" that legitimizes domestic political challengers selectively.

4.3 The Wagner/Russian Shadow: Influence Operations

The involvement of Russian-linked actors in Malagasy political processes, while less documented than French or American engagement, represents an important dimension of the foreign interference picture. Russian state media outlets, particularly RT Africa and Sputnik Africa, conducted sustained disinformation campaigns targeting Malagasy audiences in French and Malagasy between 2021 and 2025, amplifying anti-French sentiment, promoting narratives of Western neo-colonialism, and implicitly positioning Russia as a non-exploitative partner in the mold of the "African sovereignty" discourse that Wagner Group-linked actors had deployed successfully in Mali, Burkina Faso, and the Central African Republic (Stanford Internet Observatory, 2024).

There is no confirmed public evidence of Wagner Group operational presence in Madagascar analogous to its documented deployments in the Sahel. However, the Africa Intelligence newsletter and the Africa Center for Strategic Studies both noted in 2024 that Russian-linked private security companies had conducted exploratory meetings with Malagasy military officers regarding potential security assistance contracts, a pattern that preceded Wagner's formal entry into other African theatres (Africa Center for Strategic Studies, 2024). The 2025 transitional authority's initial statements included notably muted criticism of Russia and a pointed rejection of French criticism, suggesting at minimum an awareness of the geopolitical value of playing powers against one another.

Table 3: Foreign Interference Typology in Madagascar's 2025 Political Crisis

| Actor | Mode of Interference | Documented Evidence | Plausible Strategic Objective | Evidence Quality |
|--------|---|--|---|------------------|
| France | Diplomatic leverage; dual citizenship; intelligence contacts | Dual citizenship of political figures; DGSE contacts (Africa Intelligence, 2025) | Maintain Françafrique influence; protect commercial interests | Moderate-Strong |
| USA | AFRICOM engagement; democracy promotion funding; IRA mineral strategy | USAID/NED programme records; AFRICOM reports (2024); IRA legislative text | Mineral supply chain security; China containment; channel access | Moderate |
| China | Investment leverage; diplomatic support; media silence on protests | CARI investment data (2024); UN voting patterns; Xinhua framing analysis | Mining concession protection; BRI expansion; anti-Western alignment | Moderate |
| Russia | Disinformation; RT/Sputnik Africa; alleged security sector contacts | Stanford Internet Observatory (2024); Africa Intelligence (2024) | Undermine Western credibility; create security dependency opening | Moderate-Weak |

Table 3: Author's analytical synthesis based on cited sources. Evidence quality ratings are author's assessments: "Strong" = direct documentation; "Moderate" = credible indirect evidence; "Weak" = principally inferential or single-source.

V. The Human and Environmental Cost

5.1 Geopolitical Maneuvering and the Neglect of Humanitarian Crisis

The sustained attention paid by foreign governments and corporations to Madagascar's mineral potential and geostrategic position stands in stark and morally significant contrast to the international community's response to the island's humanitarian emergencies. The Kere famine conditions affecting Madagascar's southern Androy, Anosy, and Atsimo-Andrefana regions have been documented for decades, but funding for emergency food assistance consistently falls short of United Nations appeals. In 2024, WFP reported a funding gap of approximately 67% against its Madagascar emergency appeal—a gap that effectively condemned hundreds of thousands of children to preventable malnutrition while the same governments contributing to that gap maintained well-funded diplomatic and intelligence presences in Antananarivo oriented toward mineral access (WFP, 2024).

The political instability of 2025 further disrupted the delivery of humanitarian assistance to affected regions, as road access was periodically interdicted, government counterpart institutions were dissolved and reconstituted, and donor-government relationships required renegotiation with the transitional authority. In this sense, the geopolitical dynamics that contributed to political instability imposed a direct cost on the most vulnerable Malagasy populations, creating a form of structural violence mediated through the intersection of resource competition and governance failure.

5.2 The Green Energy Paradox: Critical Minerals and Ecological Destruction

A particularly acute contradiction inheres in the relationship between the global green energy transition—ostensibly oriented toward environmental sustainability—and the environmental consequences of critical mineral extraction in Madagascar. Rio Tinto's QMM ilmenite mining operations in the Fort Dauphin area have been the subject of sustained criticism from environmental organizations, including concerns about the destruction of littoral forest habitats, impacts on endemic lemur populations, and inadequate consultation with local communities (BankTrack, 2023). Graphite mining in the Vohémar region has generated documented concerns about waterway contamination, deforestation for charcoal used in processing, and inadequate reclamation of exhausted pit sites.

The "green" credentials of minerals destined for EV batteries are thus substantially compromised by the ecological and social costs of their extraction in source countries. This paradox—that the transition away from fossil fuels is generating a new wave of environmentally destructive extraction in some of the world's most biodiverse ecosystems—has received insufficient attention in mainstream climate policy discourse. In Madagascar's specific context, the island's endemic biodiversity—already under severe pressure from slash-and-burn agriculture (tavy), charcoal production, and infrastructure

development—faces an additional threat from mining intensification driven by external demand dynamics over which Malagasy communities have no meaningful influence.

Table 4: Selected Environmental and Social Impacts of Mining Operations in Madagascar

| Operation | Operator / Affiliation | Commodity | Documented Impact | Remediation Status |
|-------------------------|--|--------------------------|--|---------------------------------------|
| QMM (Fort Dauphin) | Rio Tinto (UK/Australia) | Ilmenite / Mineral Sands | Littoral forest clearing; lemur habitat loss; community displacement | Partial; contested by NGOs |
| Ambatovy (Moramanga) | Sumitomo/Sherritt (Japan/Canada) | Nickel-Cobalt | Tailings management concerns; river contamination alerts (2019) | Ongoing; mine in care-and-maintenance |
| Vohémar Graphite Region | Tirupati Graphite (UK); Chinese artisanal operations | Natural graphite | Waterway graphite dust contamination; deforestation for charcoal; inadequate pit reclamation | Minimal; artisanal sector unregulated |
| Chromite Mining (North) | Multiple Chinese-affiliated SMEs | Chromite | Erosion; access road deforestation; community conflict over land rights | Largely absent |

Table 4: Author's synthesis based on BankTrack (2023), WWF Madagascar (2023), UNDP Madagascar Country Programme Document (2023), and Amnesty International (2022). Remediation status is indicative based on available NGO and company reporting.

VI. Critical Analysis: Sovereignty vs. Interference

6.1 The "Smoking Gun" Problem: Assessing Evidence of Directed Interference

A rigorous assessment of foreign interference in Madagascar's 2025 transition requires distinguishing between several qualitatively distinct levels of external involvement: (1) opportunistic exploitation of instability after the fact; (2) soft influence operations—media, civil society, diplomatic—that shape the political environment without directly directing events; (3) covert operations that actively accelerate or engineer specific political outcomes; and (4) a CIA-directed or equivalent foreign intelligence-managed coup. The evidence available in the public domain, assessed critically, supports

the first two categories robustly and the third partially, while the fourth—the "smoking gun" of direct coup orchestration—remains speculative rather than documented.

This analytical finding is significant because popular and social media narratives of the 2025 events in Madagascar frequently collapsed these distinctions, characterizing the transition as straightforwardly a Western-engineered coup without adequate evidentiary basis. Such narratives, while capturing genuine dynamics of foreign interest and opportunistic interference, obscure the agency and authenticity of the internal protest movement and the indigenous character of the military's intervention calculus. Analytically conflating legitimate popular revolt with foreign-engineered destabilization ultimately serves to delegitimize exactly the kind of grassroots civic action that deserves recognition and support.

6.2 Manufactured Instability: Structural Rather Than Conspiratorial

A more analytically productive framework than the "CIA coup" paradigm is the concept of "manufactured instability"—a structural condition in which the policies, investment strategies, trade relationships, and governance conditionalities imposed by foreign actors create and perpetuate the material conditions for political instability without requiring direct conspiratorial coordination. This concept draws on dependency theory (Frank, 1967), Gramsci's notion of hegemony, and more recent work on "resource curse" dynamics (Auty, 1993; Sachs & Warner, 1995) to explain how external actors can systematically benefit from instability without having necessarily engineered it.

In Madagascar's case, the manufactured instability argument operates at several levels. Mining agreements that repatriate profits and leave minimal fiscal benefit within the host country ensure that resource wealth does not translate into public goods provision, maintaining poverty that fuels political grievance. Diplomatic relationships that prioritize investment access over governance standards create incentives for corruption within the political elite. Security assistance relationships that build parallel channels of influence within the armed forces create structural conditions for military intervention independent of any specific operational directive. These conditions, taken together, create a political environment chronically vulnerable to the kind of crisis that occurred in 2025.

6.3 The Sovereignty-Interference Nexus and International Law

The tension between state sovereignty and foreign interference in Madagascar's political processes raises important questions under international law. The United Nations Charter's Article 2(1) enshrines the sovereign equality of all member states, and Article 2(7) prohibits intervention in matters essentially within the domestic jurisdiction of any state. However, the practice of great-power politics has consistently subordinated these formal principles to strategic interests, particularly where

the states in question are small, economically dependent, and geopolitically peripheral in conventional power terms.

Madagascar's situation illustrates what political scientists have termed the "sovereignty paradox"—the formal legal existence of sovereignty coexisting with its effective erosion through economic dependence, informational penetration, and military relationship asymmetry (Krasner, 1999). A country that is formally sovereign but whose principal revenue source depends on mining concessions granted to foreign companies, whose military officers are trained and equipped by a foreign power, whose media environment is shaped by foreign-funded civil society, and whose government faces continuous diplomatic pressure from foreign capitals possesses sovereignty in legal form while experiencing its practical negation.

VII. Conclusion

7.1 Summary of Findings

This paper has argued that Madagascar's 2025 political transition represents neither a simple case of domestic democratic revolt nor a straightforwardly externally engineered coup, but rather a complex intersection of genuine internal crisis and systematic foreign exploitation. The internal catalysts—90%+ poverty, recurrent famine, documented corruption, and the mobilizing power of social media among a young, aggrieved population—were real, substantial, and sufficient to produce political instability independently of any external orchestration. The military's intervention followed historical patterns established over five decades of civil-military relations in Madagascar.

The external dimension operates at the level of structural condition-setting, soft influence, and opportunistic exploitation rather than direct operational control. France's *Françafrique* networks, the United States' combination of AFRICOM engagement and IRA-driven mineral diplomacy, China's aggressive investment expansion, and Russia's disinformation operations each represent distinct modes of foreign interference that cumulatively constrain Malagasy political sovereignty without individually constituting evidence of a directed coup. The critical minerals dimension—Madagascar's graphite, nickel, cobalt, and rare earth wealth—provides the material incentive that explains the intensity and persistence of foreign attention to an island nation whose geopolitical significance would otherwise be modest.

7.2 The Need for a Pan-African Institutional Framework

The structural vulnerability that allows Madagascar to be subjected to these competing forms of foreign interference reflects not only bilateral power asymmetries but also the absence of an effective multilateral African institutional framework for protecting member states' resource sovereignty. The

African Union's Africa Mining Vision (AMV), adopted in 2009, articulated a framework for "transparent, equitable, and optimal exploitation of mineral resources to underpin broad-based sustainable growth and socio-economic development," but implementation has been severely limited by the absence of enforcement mechanisms and the resistance of major mining-interest states to binding commitments (African Union, 2009).

A strengthened Pan-African institutional architecture—modeled in part on the successful precedents of OPEC's supply management mechanisms and the Kimberley Process's transparency requirements—could provide Madagascar and similarly positioned resource-rich but institutionally weak states with collective bargaining power vis-à-vis foreign mining interests and the governments that back them. Such a framework would need to address mining licensing transparency, profit repatriation limitations, mandatory domestic processing requirements to capture value addition, and dispute resolution mechanisms capable of being enforced against multinational corporations operating across multiple jurisdictions.

7.3 Final Verdict: Victim or Puppet?

The framing of Madagascar as either "a victim of its own politics" or "a puppet on a global stage" presents a false dichotomy that obscures the more complex reality. Madagascar is a state whose people and institutions possess genuine agency—demonstrated most powerfully by the authentic, internally generated protest movement of 2025—but whose exercise of that agency occurs within a structural environment systematically shaped by external actors whose interests rarely align with those of the Malagasy population. The island is neither purely a victim nor simply a puppet; it is a site of genuine political contestation in which external forces seek to shape outcomes in their favor, often at the expense of the 30 million people whose home it is.

The most productive analytical and policy orientation, therefore, is one that takes seriously both the agency of Malagasy political actors and the structural constraints imposed upon them—and that directs reform energies not only toward better Malagasy governance (the conventional donor prescription) but equally toward the reform of the international mining investment regime, the geopolitical competition frameworks, and the disinformation infrastructures that transform Madagascar's internal political vulnerabilities into external strategic opportunities. Until those structural conditions are addressed, Madagascar's cycle of instability and exploitation will continue regardless of which domestic political faction holds formal power.

"Madagascar's tragedy is not that it is resource-rich in a poor world, but that it is resource-rich in a world where the extraction of those resources is governed by the interests of the extractors rather than the extracted. The Gen Z generation that took to the streets in 2025 understood this, even if the international community that applauded their courage has yet to act on its implications."

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