

INCLUDE

Terms of Partnership: African Perceptions of European and Dutch Development Cooperation



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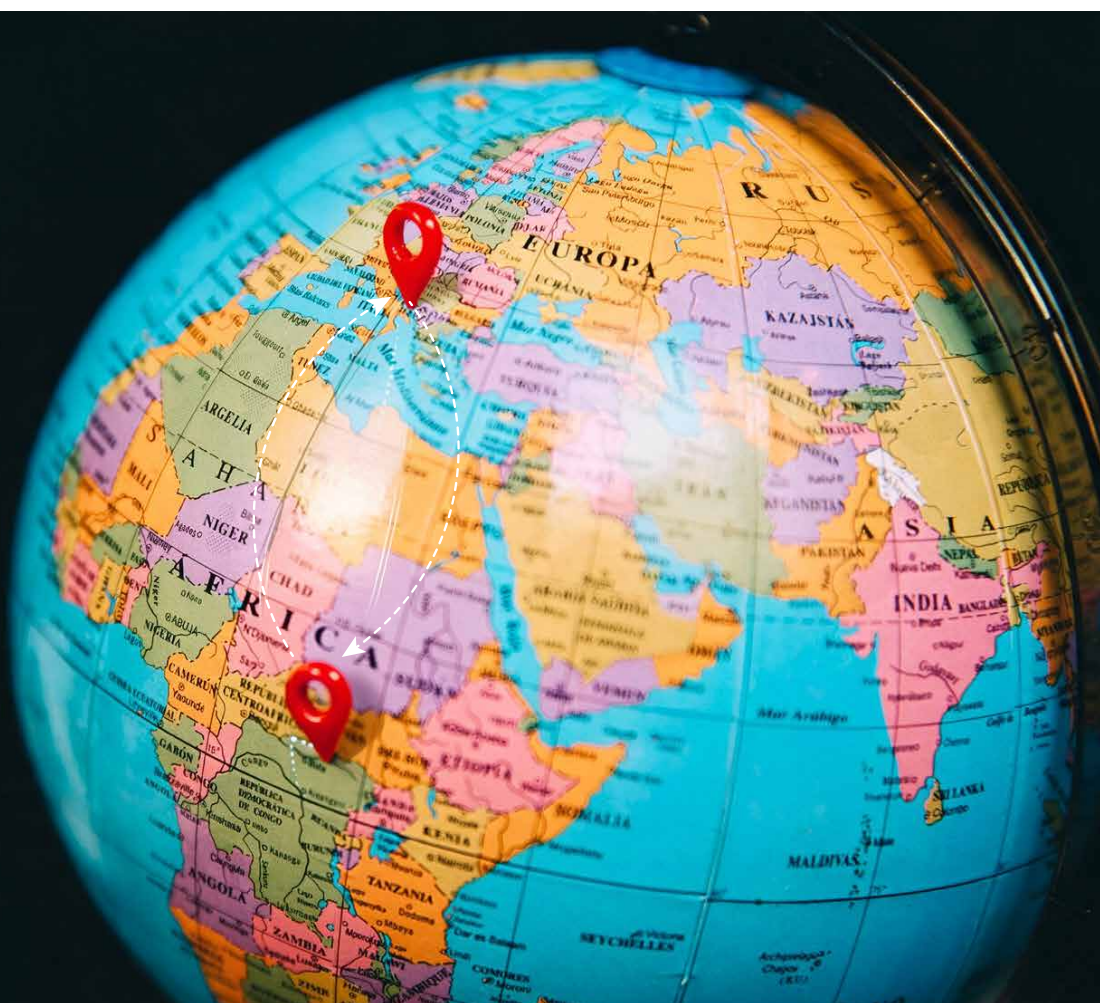
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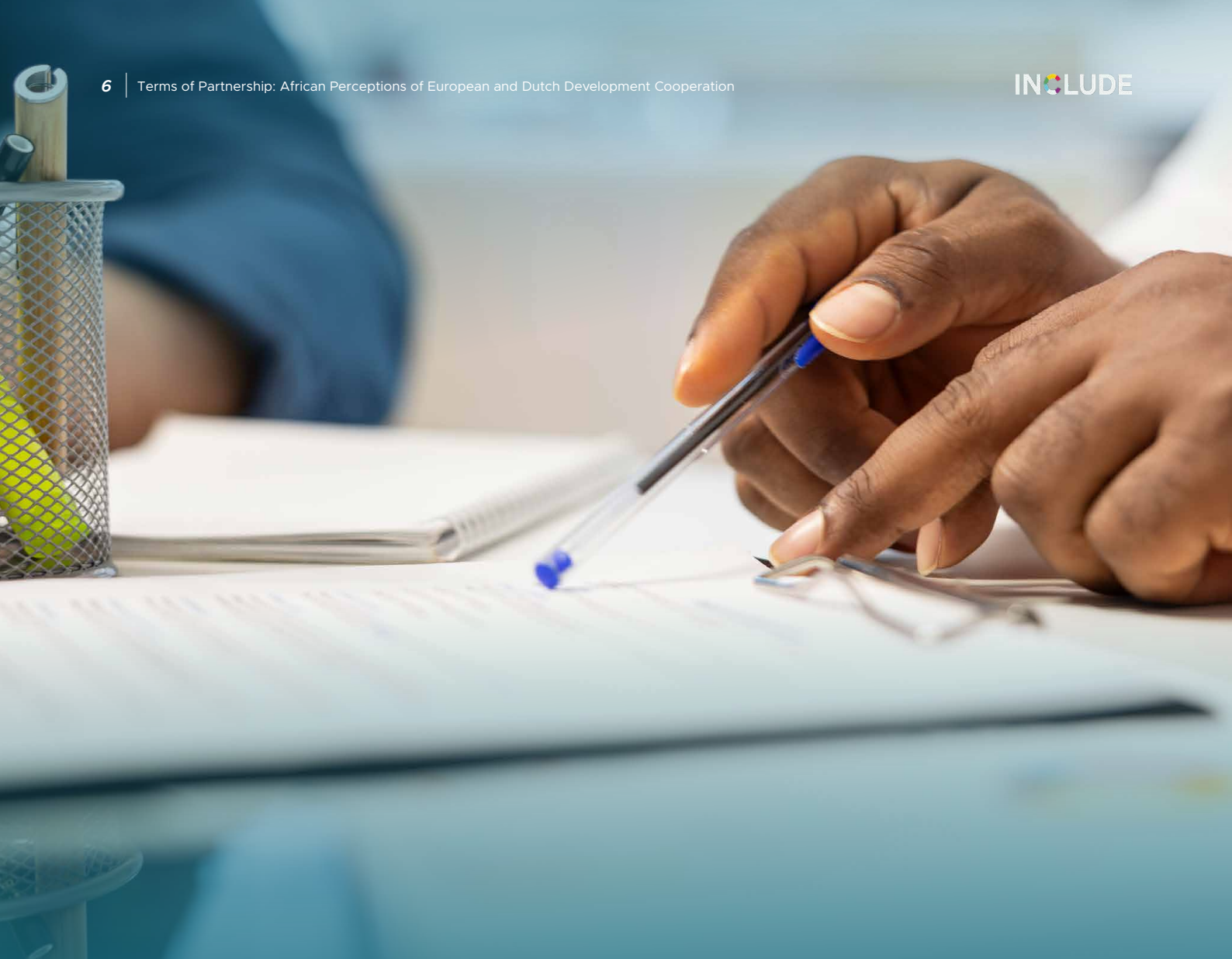


About the Wider Study

This report is part of a wider perception study examining how African stakeholders perceive the European Union and the Netherlands as development and strategic partners. The study brings together seven complementary outputs, each providing a different perspective on trust, alignment, ownership, relevance and the quality of African–European partnerships. Together, these sources help identify where cooperation is valued, where concerns and structural tensions emerge, and what these perceptions reveal about the future of African–European partnerships.

The wider study comprises the Evidence Synthesis Report, Survey Findings, AU-ECOSOCC Roundtable Report, Digital Listening Report, Five Country Reports, Policy Briefs, and a Comparative Synthesis. Each output uses a distinct form of evidence and has its own methodological strengths and limitations. The findings are therefore considered together to identify areas of convergence, complementarity and divergence rather than as a single dataset.





About this Report

This report presents findings from the Netherlands and EU Perception Survey, an online survey of African policy stakeholders conducted in 2026. The survey explores how respondents perceive and experience the Netherlands and the European Union as development and strategic partners, including their views on trust, policy alignment, ownership and agency, effectiveness, financing, responsiveness and the quality of engagement.

This is the second output based on primary data, providing the skeletal framework that identifies the key nuances, patterns and questions we need to investigate and explore further in the subsequent outputs.

Methodology

Research Design and Purpose

This report presents findings from an online survey examining how policy stakeholders engaged with African development issues perceive the European Union and the Netherlands as development and strategic partners. The survey forms part of a wider multi-method research programme conducted by the INCLUDE Knowledge Platform in 2026.

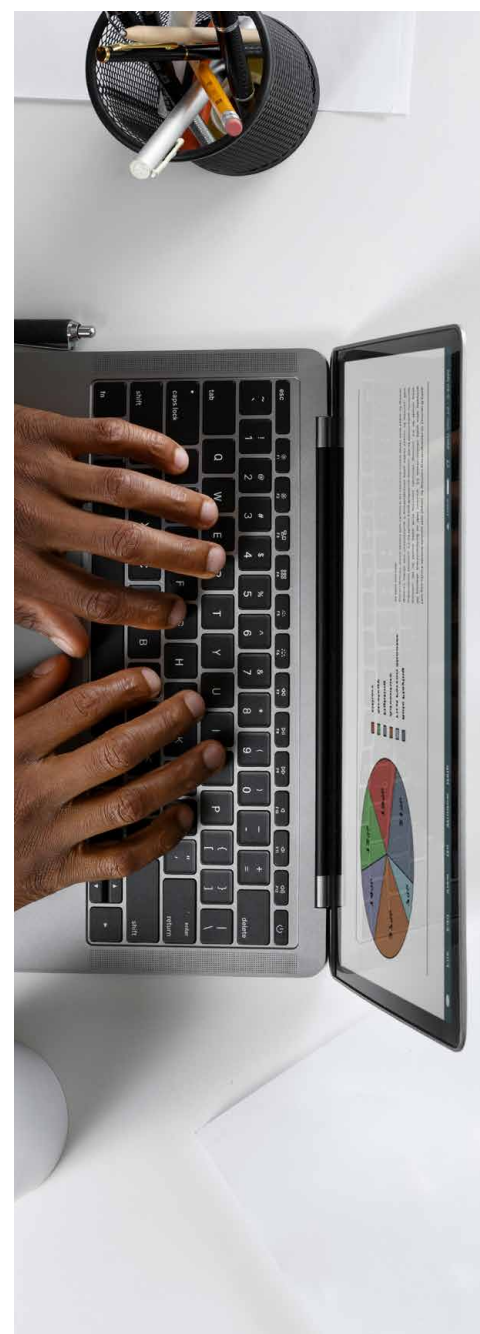
The survey was designed to capture respondents' stated perceptions, experiences and assessments across a range of issues relating to Dutch and European partnerships, including trust, alignment, autonomy, cooperation, strategic relevance and the perceived effectiveness of development engagement.

The survey provides a broad descriptive account of the views expressed by the respondents reached through the survey process. It is not intended to provide a statistically representative account of the views of all African stakeholders.

Survey Population and Recruitment

The survey received responses from 1,534 policy stakeholders engaged with African development issues. It was administered online between February and May 2026 and disseminated through the African Union Economic, Social and Cultural Council (AU ECOSOCC), which provided an institutional channel for reaching stakeholders across its networks.

The respondent pool should therefore be understood in relation to the networks through which the survey was distributed, as well as the time, access and interest required to complete an online questionnaire. Participation was voluntary, and the survey should not be understood as a probability sample of African populations or of all policy stakeholders working on development issues.



¹ INCLUDE Knowledge Platform. (n.d.). Include Africa Perceptions: How does Africa see European and Dutch development cooperation? <https://include-projects.vercel.app/include-africa-perceptions.html>

Survey Instrument

The questionnaire explored respondents' perceptions and experiences of Dutch and EU partnerships. Questions addressed the extent to which respondents perceived these partnerships as:

- » Aligned with African priorities;
- » Responsive to African needs and interests;
- » Based on mutual trust and respect;
- » Supportive of African agency and autonomy;
- » Strategically relevant to African development;
- » Coherent and effective in practice; and
- » Capable of responding to changing African and global circumstances.

Where the report uses concepts such as trust, alignment, autonomy or coherence, these refer

to respondents' stated perceptions as captured through the relevant survey items.

In particular, relational trust is used in this report as an analytical concept for interpreting perceptions of the relationship between African stakeholders and European partners. In this report, it was not necessarily measured as a single, independently validated construct. However it was developed from the evidence synthesis which builds the analytical framework for the entire perception study. Where elements of relational trust as established in the evidence synthesis is identified in this report, the term is used to capture such a phenomenon.

Data Analysis

The analysis is primarily descriptive. It examines the distribution of responses across survey questions and identifies recurring patterns in respondents' perceptions.

Where relevant, findings are considered in relation to the composition of the respondent pool and any available information on respondents' institutional affiliation, professional background, geographic location or area of engagement. Any subgroup comparisons are interpreted cautiously, particularly where the number of respondents in a subgroup is limited.

Open-ended responses, where available, are used to identify recurring concerns, explanations and examples that help contextualise the quantitative findings. Such responses are treated as illustrative accounts from participants rather than as statistically representative evidence.

Interpretation of Findings

The survey findings should be read as an account of the views expressed by the respondents reached through the survey process. They indicate how this group of stakeholders perceives the EU and the Netherlands, but they do not establish the prevalence of those views across all African countries, communities or institutions.

The survey does not include all groups affected by development cooperation. In particular, rural communities, local beneficiaries and other stakeholders who were not reached through the survey networks may be underrepresented or absent.

The findings are therefore interpreted with attention to:

- » The recruitment and dissemination process;
- » The composition of the respondent pool;
- » Differences in national and institutional contexts;
- » The limits of generalising from the respondents to African stakeholders as a whole.

Analytical Approach and Framework

The survey is analysed primarily through descriptive statistics, using the analytical framework developed in the Evidence Synthesis Report. The framework examines perceptions across three interconnected levels: **structural, historical and project-level**, and six dimensions of partnership: **trust and credibility; ownership and local agency; power and decision-making asymmetries; alignment with national and regional priorities; perceived effectiveness; and financing modalities**.

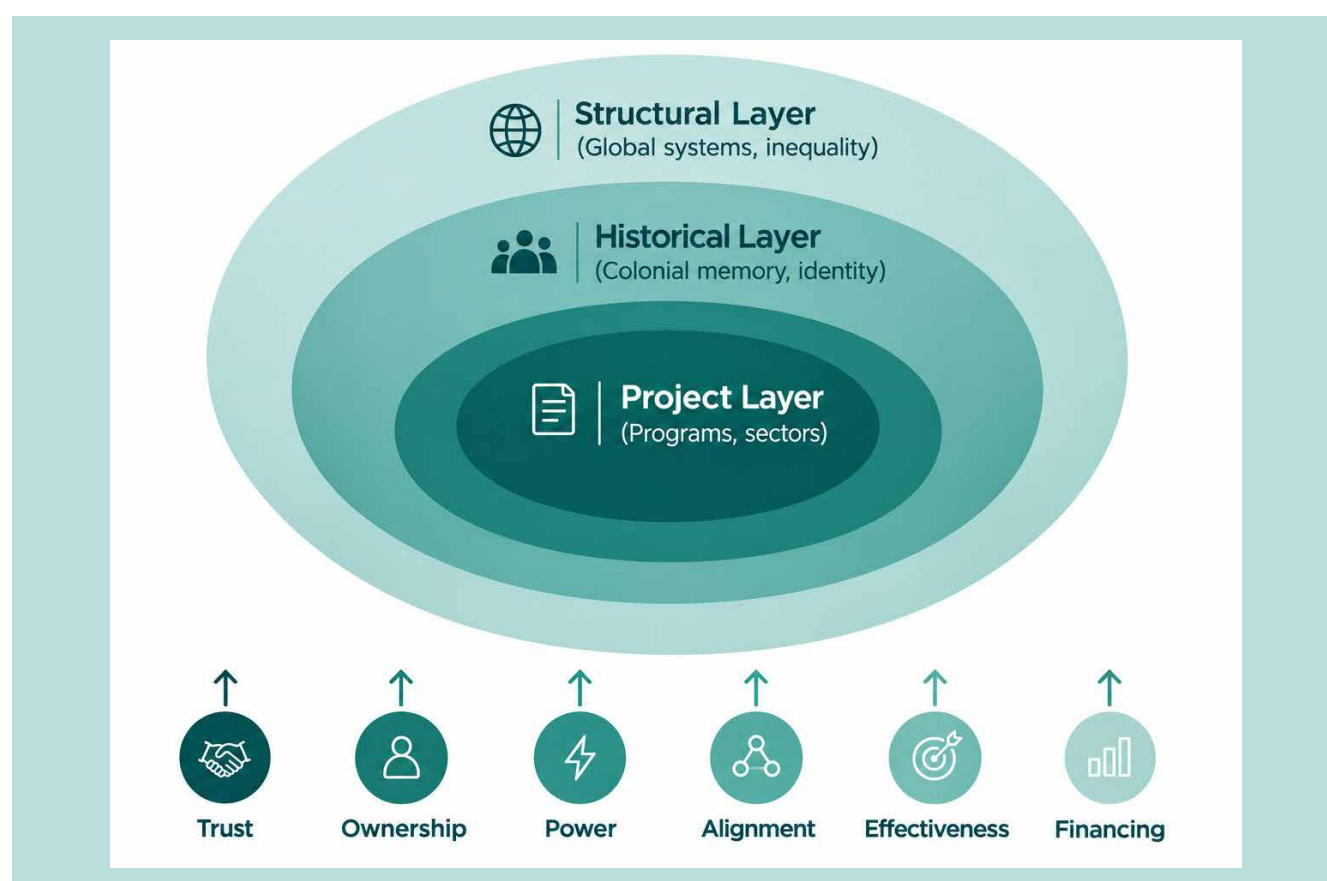


Figure 1: Analytical framework for understanding perceptions of European and Dutch cooperation in Africa: Author's own illustration, based on the Evidence Synthesis (2026)

For this report, the framework is used as an analytical lens rather than a scoring system. It provides a common structure for interpreting the survey findings and relating them to the wider perception study, while recognising that the survey captures respondents' stated perceptions and cannot establish causality or represent all African stakeholders.

Executive Summary

Ask African policy stakeholders what they think of the Netherlands, and most give a good answer. Ask the same people what is wrong with Dutch cooperation, and most give a detailed answer too, often in the same breath. Section B (the synthesis) works through why both answers can be true at once. This summary sets out five points that follow from that finding, for readers who want the shape of the argument before the evidence behind it.

The 2026 Netherlands and EU Perception Survey provides a nuanced picture of how African policy stakeholders experience the Netherlands as a development and strategic partner. The overall assessment is positive, but this positive perception sits alongside clear concerns about how cooperation is designed and delivered. The central finding is therefore not that respondents are either satisfied or dissatisfied with Dutch cooperation. Rather, they value the relationship while also calling for changes in the way that partnership is structured.



Valued partner, contested model: The overall picture is positive: 56.7% rate the Netherlands as a positive or very positive development partner, and 50.4% consider it more trustworthy than other international actors. But four structural concerns dominate the challenge question and together account for 84.9% of responses: short-term project cycles (30.5%), limited consultation with African institutions (20.7%), power imbalances (18.7%) and conditionalities or policy rigidity (15.0%). This critique is not a minority dissent. Nearly three in four of those citing short cycles as the main challenge still view the Netherlands positively.



Trust is real but narrow: Among respondents directly involved in Dutch-supported programmes, 83.4% hold positive perceptions, compared with 14.0% among those with no direct contact. The trust respondents express appears to be mainly procedural: funding arrives and commitments are kept. It is less clearly relational, meaning

confidence that African partners shape priorities and influence outcomes. The survey cannot establish that direct engagement causes more positive views.



Alignment is not the same as ownership: A majority (58.7%) see Dutch engagement as moderately or strongly aligned with Agenda 2063 and the AfCFTA, and 57.4% say the Netherlands respects African policy autonomy well or very well. However, 30.3% describe alignment as only partial. These results show that Dutch cooperation is broadly compatible with African priorities. They do not show that African actors set those priorities or shape how programmes are implemented.



The demand is for better terms, not more money: Multi-year funding is considered desirable or highly desirable by 72.3% of respondents, and adaptive, locally responsive funding is rated effective or very effective by 68.7%. These are the direct counterparts of the problems respondents identify. By

contrast, insufficient scale or ambition ranks sixth, at 4.2%. More funding delivered through the same architecture risks reproducing the same problems at greater scale.



Distinctiveness is experienced more than recognised: The Netherlands has a clear sectoral profile in agriculture and food systems (22.9%) and in climate and the green transition (22.5%). Knowledge exchange and research ranks last, at 9.1%.

Almost half (49.6%) of directly involved respondents see the Netherlands as very clearly distinct from other European partners, but only 20.0% of the full sample do. The EU, by comparison, is associated mainly with funding, institutions and regulation. If direct engagement channels narrow, the Netherlands risks being seen as simply part of the wider European landscape.

This provides the central thread linking the survey to the wider perception study. Positive perceptions and structural concerns are not competing conclusions. They describe different aspects of the relationship. The survey shows where the Netherlands has built credibility; it also shows the conditions that respondents associate with a more responsive and sustainable form of cooperation.



Quantitative Evidence: Netherlands Perception Survey 2026

n = 1,524 completed responses (1,534 total completed and incomplete)²

A.1 What the Numbers Actually Show

The headline finding of the Netherlands Perception Survey is positive. Among the 1,482 respondents with valid responses to the overall perception question, 56.7% rated the Netherlands as a positive development partner. More than half, 50.4%, rate Dutch cooperation as more trustworthy than other international actors active in Africa. These findings indicate a comparatively favourable perception of the Netherlands among respondents in the survey.³

However, the survey contains a second finding that sits directly alongside the first, and the two must be read together or neither makes sense. Alongside the positive overall perception finding, respondents identify short-term project cycles (30.5%), limited consultation with African

institutions (20.7%), power imbalances (18.7%), and conditionalities or policy rigidity (15.0%) as the primary structural failures of the cooperation model, though the perception question (valid *n*=1,482) and the challenge question (valid *n*=1,533) have different denominators. When read together, these four challenges account for 84.9% of valid responses to the challenge question. This is not a fringe critique. Out of the 465 respondents who identified short-term cycles as the primary challenge, 342 of them, nearly three in four, simultaneously hold positive or very positive views of the Netherlands overall. The structural critique is not a minority dissent. It is a majority position, including among those who most value the relationship.

Critical finding: Positive perception and reports of structural dissatisfaction are not in tension. They describe different layers of the same relationship as reported by respondents. Respondents report having earned technical trust in the Netherlands while simultaneously identifying significant structural weaknesses in the design and delivery of Dutch cooperation. Both patterns are present in the data. Neither explains away the other.

² The findings describe the views of respondents reached through the survey process. See "Respondent Composition" and "Methodological Limitations" at the end of this report for the recruitment method and institutional breakdown.

³ Base after excluding corrupted response cells (see methodological note): 1,482. Limited or no direct engagement (*n*=86): 14.0% positive, 36.0% negative, 50.0% neutral; Indirect awareness (*n*=209): 41.1% positive, 18.7% negative, 40.2% neutral; Occasional engagement or consultation (*n*=378): 36.8% positive, 15.3% negative, 47.9% neutral; Regular engagement (*n*=472): 68.2% positive, 5.7% negative, 26.1% neutral; Directly involved in design or implementation (*n*=337): 83.4% positive, 7.1% negative, 9.5% neutral.

A.1.1 The Engagement Gradient

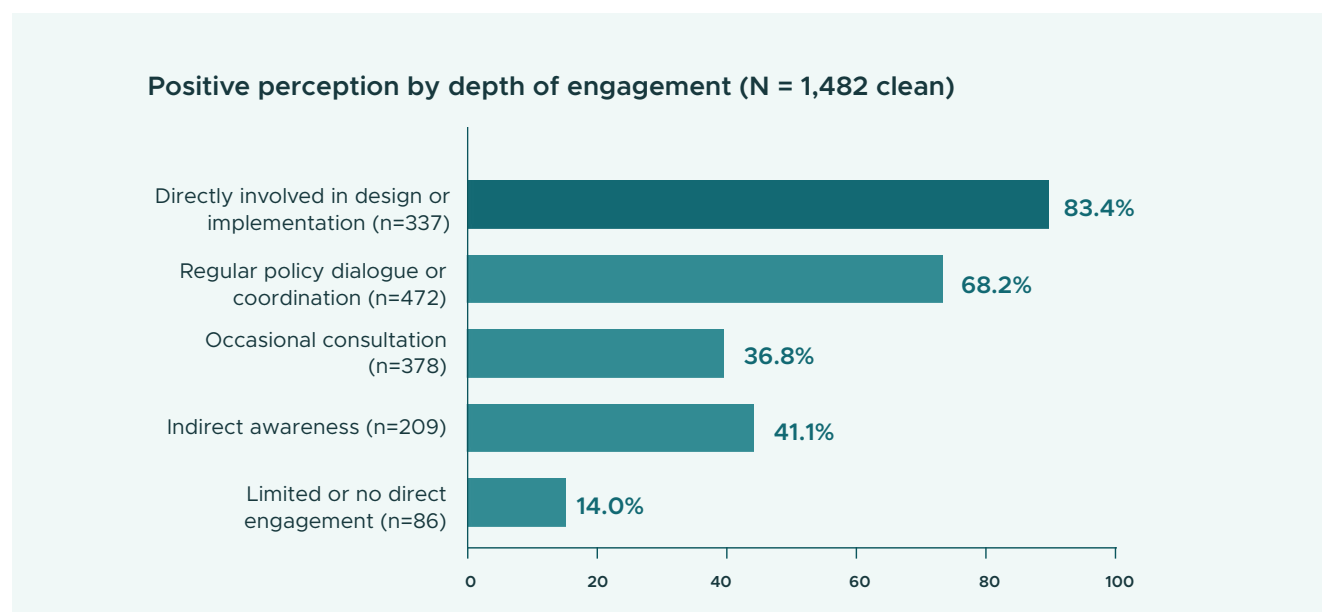


Figure A.1: Positive perception of the Netherlands by depth of engagement. ⁴

This chart reveals one of the clearest patterns in the dataset. Among respondents with the least direct engagement, 14.0% report positive perceptions, while 36.0% report negative perceptions. As the level of engagement increases, perceptions become markedly more positive. Among respondents directly involved in programme design or implementation, 83.4% report positive perceptions and only 7.1% report negative perceptions. This positive association between depth of engagement and favourable perceptions is one of the strongest and most consistent relationships observed in the survey.

The findings suggest that respondents with direct experience of Dutch programmes are substantially more likely to hold favourable views than those whose engagement is indirect. This pattern is consistent with the possibility that direct interaction provides experiences that shape more positive perceptions of Dutch cooperation. At the same time, respondents with only indirect engagement appear considerably less positive, indicating that favourable

experiences may not extend beyond those who interact closely with Dutch programmes. The survey cannot establish causality. The association is consistent with the possibility that meaningful direct engagement contributes to more favourable perceptions, although the cross-sectional design cannot establish direction or rule out alternative explanations, for example, that respondents with pre-existing positive views may be more likely to seek out or be selected for direct engagement, or that better-connected organisations both receive Dutch support and hold more favourable views for unrelated reasons. This suggests that generating more direct relationships may be a more consequential lever than communicating better from the centre outward. Although this remains an observed association rather than a demonstrated causal lever: depth of engagement is the strongest observed association with positive perceptions in this survey. This relationship will be explored further in the 5 country case studies.

⁴ INCLUDE Knowledge Platform. (n.d.). *Include Africa Perceptions: How does Africa see European and Dutch development cooperation?* <https://include-projects.vercel.app/include-africa-perceptions.html>

A.2 Trust: What It Is and What It Is Not

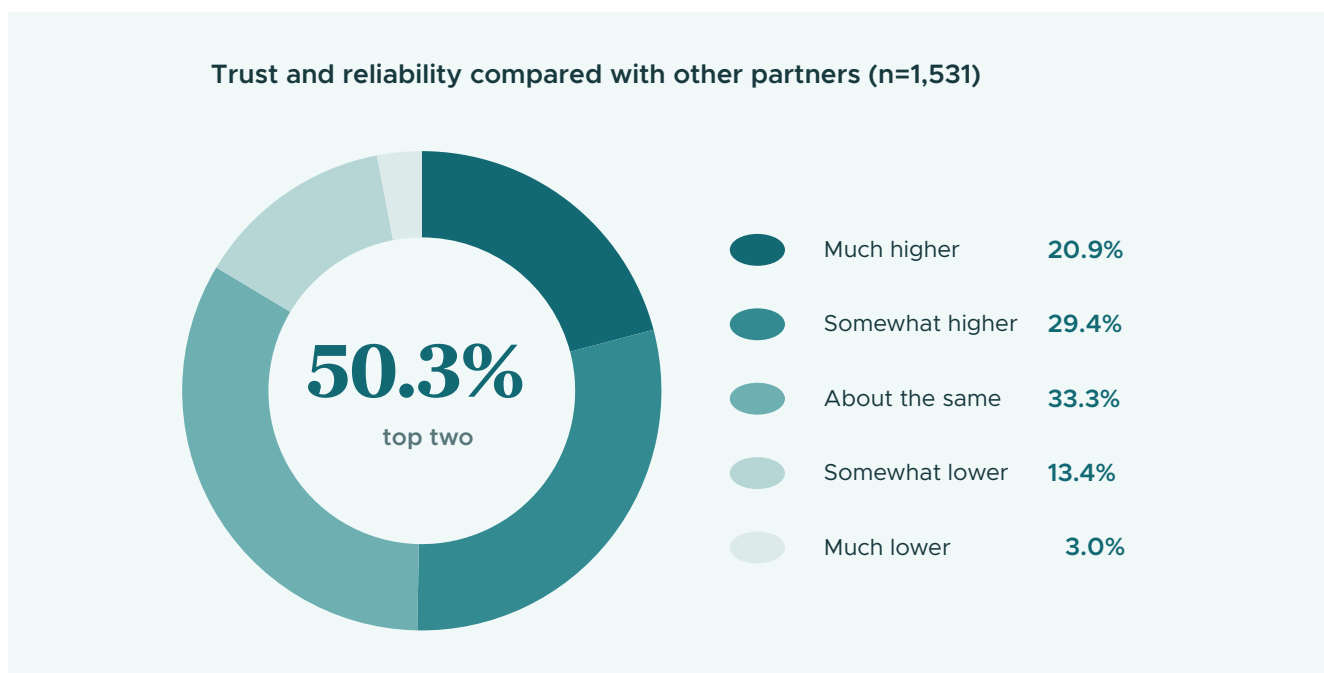


Figure A.2: Trust and reliability: Netherlands vs other international partners

More than half of all respondents, 50.4%, rate the Netherlands as more trustworthy than other international partners active in Africa, with a further 33.3% rating it as broadly comparable to peers. These are significant numbers. They are consistent with a reputation built over time for following through on commitments, disbursing funding as agreed, and maintaining institutional continuity across programme cycles, though the survey measures respondents' perceptions of this reputation, not independently verified performance data on commitment delivery. Respondents report comparatively high confidence in the technical/procedural reliability of Dutch cooperation.

The survey findings reveal an important distinction between technical (or procedural) trust and relational trust. This distinction is an analytical framework developed by the research team to interpret the findings, rather than a distinction explicitly presented to respondents. We interpret comparative trustworthiness primarily as an indicator of technical or procedural trust: confidence that processes are followed, commitments are honoured, and funding and activities are delivered as expected. **Relational**

trust, by contrast, is reflected in the areas where respondents assess Dutch cooperation less favourably, particularly alignment with African priorities, respect for African policy autonomy, consultation with African institutions, power imbalances, and the flexibility of funding arrangements. These dimensions speak to whether African partners feel that their priorities shape cooperation, that they have meaningful influence over decisions and outcomes, and that the relationship is equitable and responsive to their needs. Although the survey captured these elements through separate questions, it did not measure relational trust as a distinct, validated construct. The distinction is therefore used as an interpretive lens to examine how confidence in the reliability of Dutch cooperation can coexist with concerns about the terms on which the partnership operates.

The findings of the survey suggest that positive assessments of Dutch cooperation's procedural or technical reliability can coexist with concerns about relational trust. While respondents express confidence in the Netherlands as a development partner, their assessments of alignment with African priorities, respect for

policy autonomy, consultation with African institutions, power imbalances and the flexibility of funding arrangements point to concerns about the terms on which the partnership operates. These dimensions are central to relational trust, which concerns whether African partners feel that their priorities shape cooperation, that they have meaningful influence over decisions and outcomes, and that the relationship is equitable

and responsive to their needs. A cooperation strategy that builds on technical reliability while neglecting these relational dimensions may become harder to sustain over time, particularly as African institutions develop stronger alternatives and increasingly calibrate their international partnerships accordingly.⁵

A.3 Alignment, Autonomy, and Coherence

A.3.1 Alignment with Agenda 2063

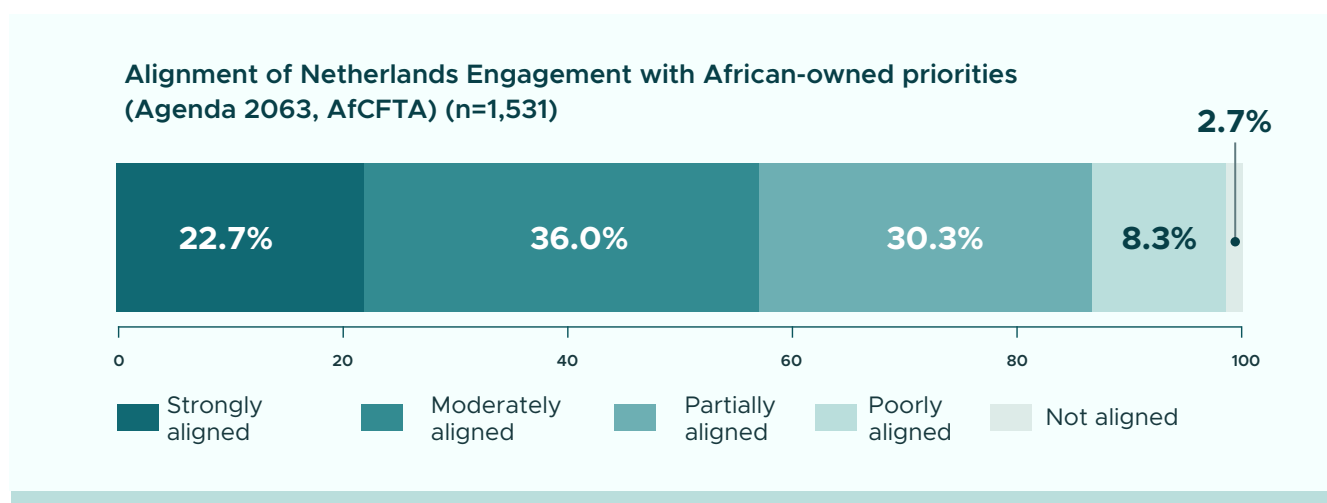


Figure A.3: Alignment with African-owned priorities, Agenda 2063 and AfCFTA

Just under six in ten respondents (58.7%) describe Dutch engagement as moderately or strongly aligned with Agenda 2063 and the AfCFTA, assessed together as a single survey measure of alignment with African Union-owned development priorities. This indicates that a majority of respondents perceive at least moderate alignment with these frameworks, while a substantial minority do not, suggesting that perceptions of Dutch engagement remain mixed rather than uniformly positive. A further 30.3% describe the alignment as only partial, and this figure demands closer attention. Partial alignment at that scale is not a marginal finding. It points to a substantial group of respondents who perceive gaps between Dutch engagement and the

priorities reflected in African Union frameworks, reinforcing the broader pattern identified across the evidence synthesis that alignment is often viewed as incomplete rather than fully realized.

The companion roundtable report⁶ offers one account of why, from participants' perspective: African organisations are largely not defining the priorities that Dutch funding instruments are built around. Participants described responding to priorities defined by European institutions, then demonstrating how their work fits those pre-determined frameworks. The result is cooperation that is in the same broad territory as African priorities without actually being shaped by them. This provides one possible explanation for why

⁵ INCLUDE Knowledge Platform. (2026). *Perceptions of European and Dutch development cooperation in Africa*. <https://include-projects.vercel.app/Perceptions%20of%20European%20and%20Dutch%20Development%20Cooperation%20in%20Africa.pdf>

⁶ INCLUDE Knowledge Platform. (n.d.). *Include Africa Perceptions: How does Africa see European and Dutch development cooperation?* <https://include-projects.vercel.app/include-africa-perceptions.html>

respondents may perceive broad rather than complete alignment; The survey findings indicate that while Dutch engagement is perceived as aligned with African-owned priorities by a majority of respondents, this alignment is not consistently perceived as strong. Read alongside the Evidence Synthesis, which documents longstanding concerns around donor-defined priorities, power

asymmetries and the limitations of short-term cooperation models, the findings point to a distinction between perceived alignment and the conditions required for African ownership and transformative change. However, the survey does not directly test whether perceived levels of alignment translate into transformative development outcomes.

A.3.2. Policy Autonomy

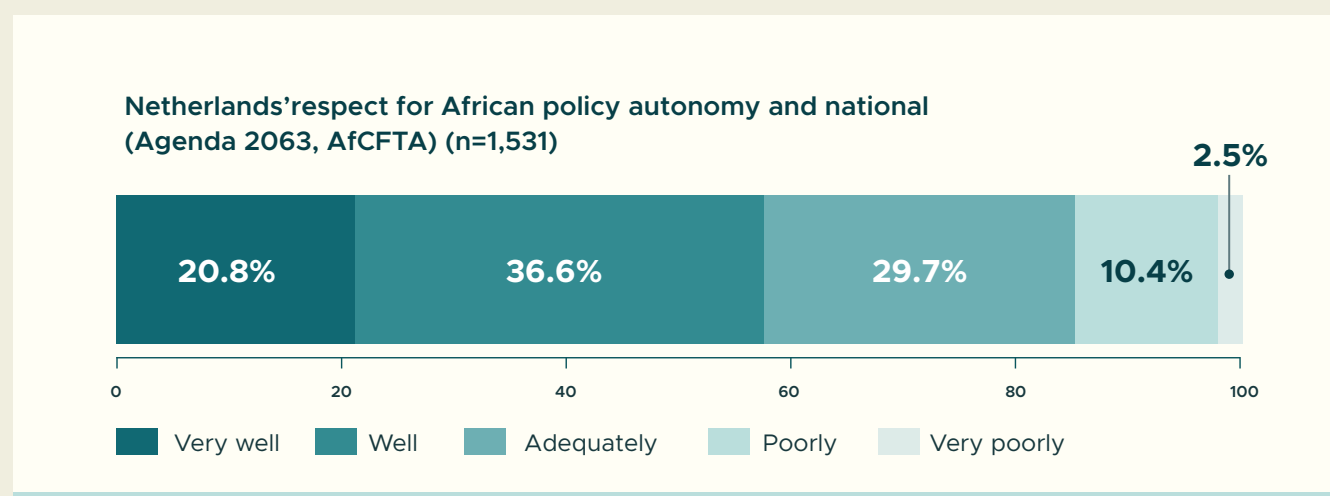


Figure A.4: Netherlands' respect for African policy autonomy

57.4% of respondents describe the Netherlands as respecting African policy autonomy well or very well, with a further 29.7% saying adequately. Only 12.9% describe poor respect for autonomy. On the face of it, this is a reassuring result. Most respondents do not feel that the Netherlands is actively overriding their policy choices.

The survey question on “policy autonomy” captures respondents’ perceptions of the formal

relationship: whether the Netherlands respects their stated policy positions at an institutional level. The respondents explained that the constraints on autonomy are not imposed by overriding policy positions. It is embedded in the architecture of accountability itself. A partner can formally endorse African ownership while structurally preventing it from being exercised. Both things can happen simultaneously, and both are happening here.⁷

A.3.3 Policy Coherence

54.2% of respondents describe Dutch policies across development, trade, climate, migration, and security as mostly or very coherent. Just over a third, 35.3%, describe the picture as mixed. This mixed category is not fence-sitting. It is a precise

and important diagnostic.

Dutch cooperation is widely perceived as coherent in its core domains: development programming, climate action, agricultural support.

⁷ INCLUDE Knowledge Platform. (n.d.). Include Africa Perceptions: How does Africa see European and Dutch development cooperation? <https://include-projects.vercel.app/include-africa-perceptions.html>

Coherence of Dutch policies across development, trade, climate, migration and security (n=1,531)

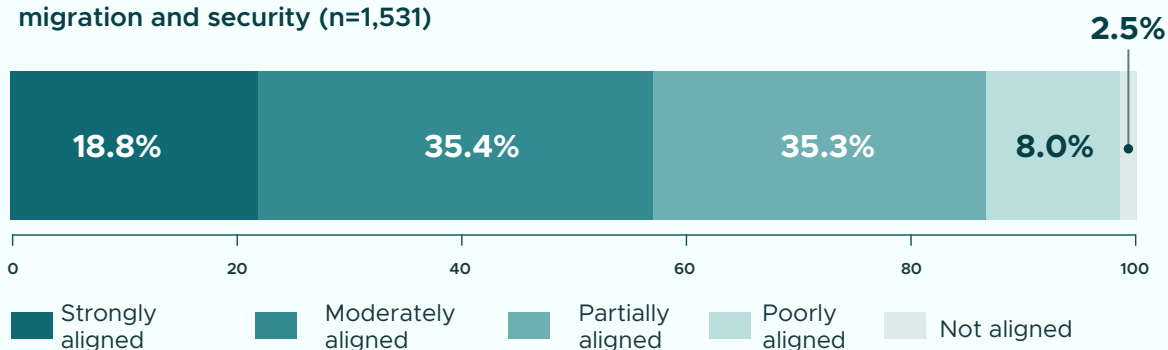
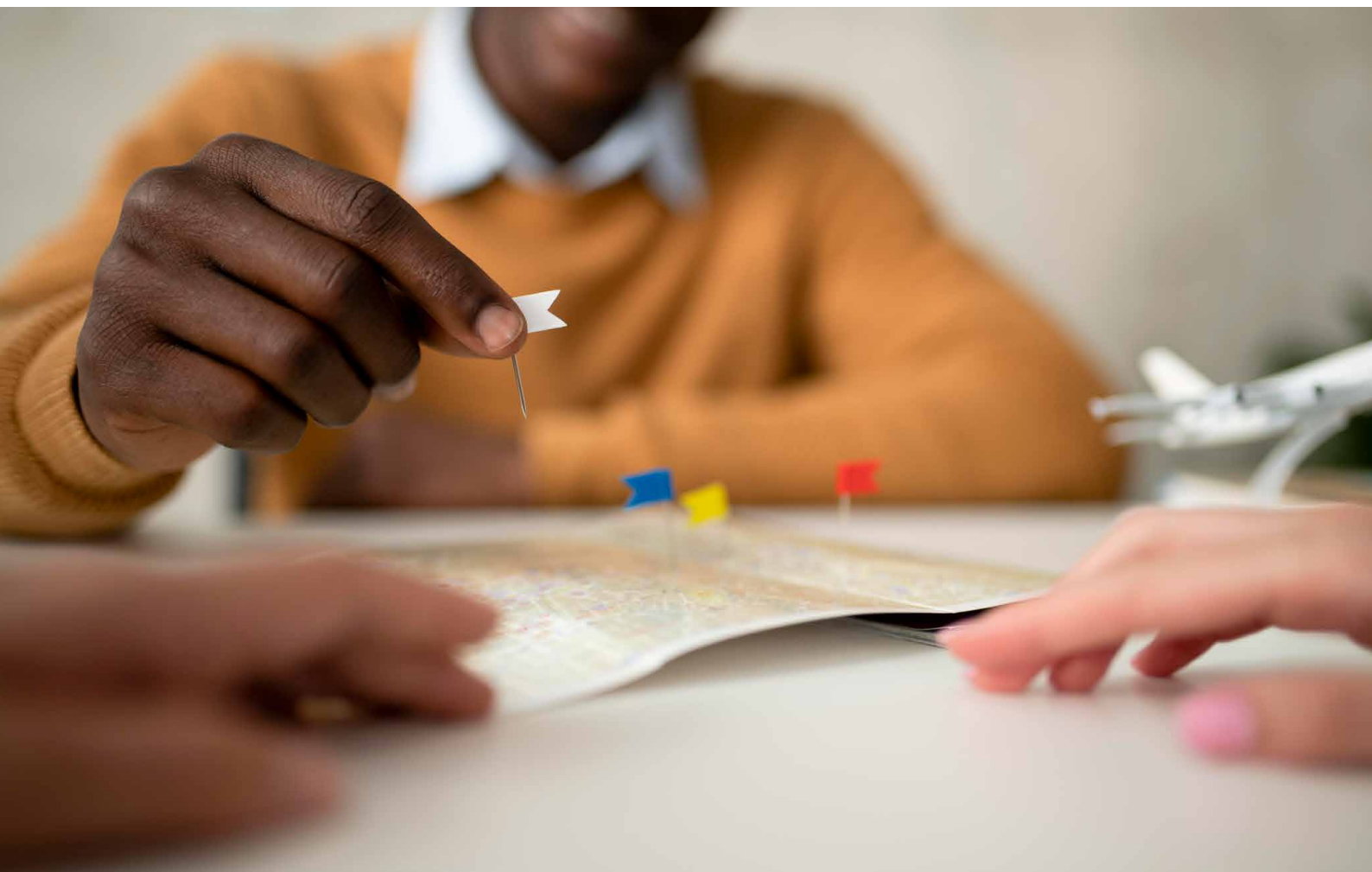


Figure A.5: Coherence of Dutch policies across development, trade, climate, migration and security

These are the areas where Dutch technical expertise is deepest and where the policy logic is clearest. The incoherence in the survey appears at the interfaces, particularly, where development objectives intersect with migration management and security cooperation. When development funding is conditioned on partner government cooperation with European migration control

objectives, the signal African partners report is rational and clear: development is not the primary objective. It is one objective among others, and when it competes with European strategic interests, it yields. The 35.3% who describe the picture as mixed are describing, with considerable precision, the policy terrain they actually have to navigate.



A.4 Sectoral Effectiveness: Anchors and a Warning Signal

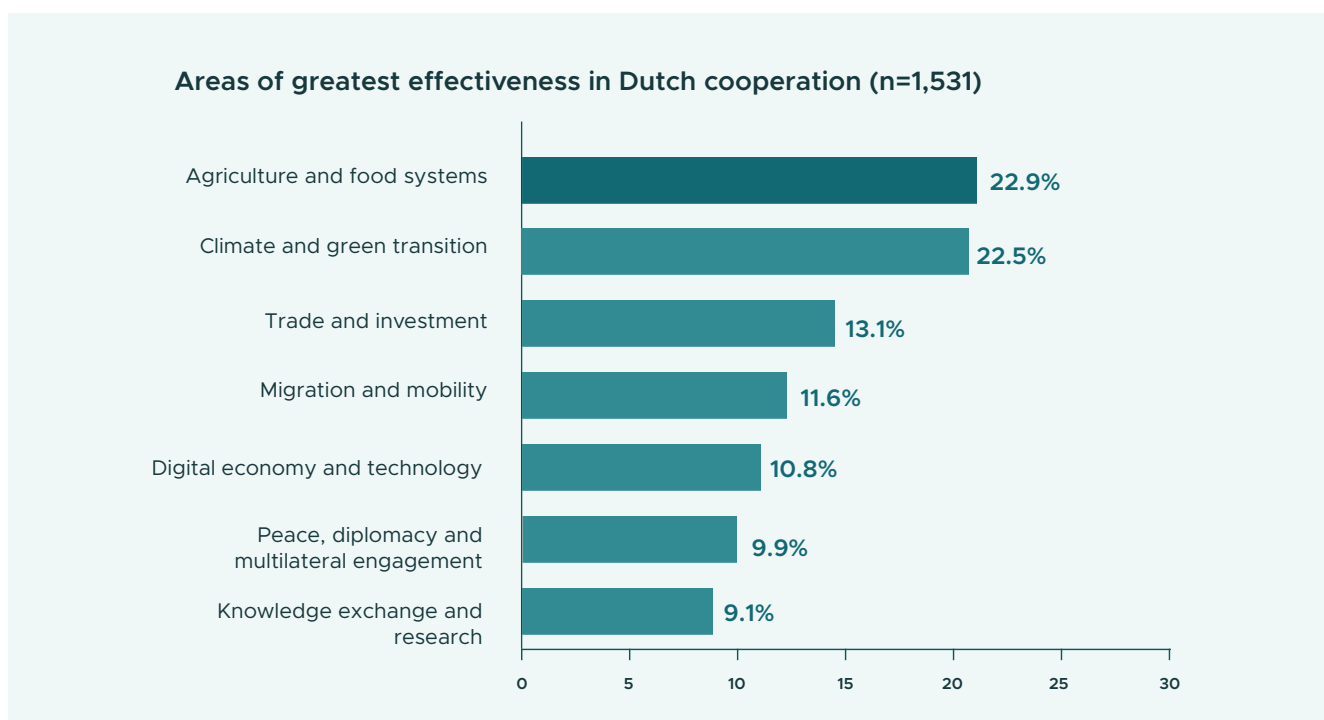


Figure A.6: Area of greatest effectiveness in Dutch cooperation

Agriculture and food systems (22.9%) and climate and the green transition (22.5%) together account for 45.4% of responses identifying the area of greatest Dutch effectiveness. This is not surprising, and it is genuinely encouraging. The concentration of positive responses in agriculture, food systems, climate and the green transition is consistent with the Netherlands' established sectoral profile in these areas. When African policy stakeholders think of what the Netherlands does well, they think of water management, agricultural innovation, and the green transition.

Knowledge exchange and research was identified by 9.1% of respondents as the area of greatest effectiveness. However, this is the lowest share of any sector listed. This finding is noteworthy in light of reported reductions in these programmes, although the survey is cross-sectional and does not establish whether the two are causally related, or whether 9.1% represents a decline from a

previously higher baseline. This will be explored further in other outputs of the study⁸. According to the evidence synthesis, the academic exchange and professional training programmes through which the Netherlands has historically built long-term human capital ties with African institutions are reported to be among the instruments scaled back in recent Dutch cooperation policy; this report has not independently verified the scale of those reductions. However, the other research outputs reveal that these programmes create durable professional networks and alumni relationships that contribute to longer-term institutional familiarity and access. In our interpretation, sustained reductions in knowledge exchange investment carry a plausible risk to the future pipeline of Dutch relational capital in Africa, though this study cannot establish that the current 9.1% figure is itself a consequence of those reductions rather than a stable baseline.

⁸ INCLUDE Knowledge Platform. (n.d.). *Include Africa Perceptions: How does Africa see European and Dutch development cooperation?* <https://include-projects.vercel.app/include-africa-perceptions.html>

A.5 What Limits Effectiveness: A Structural Diagnosis

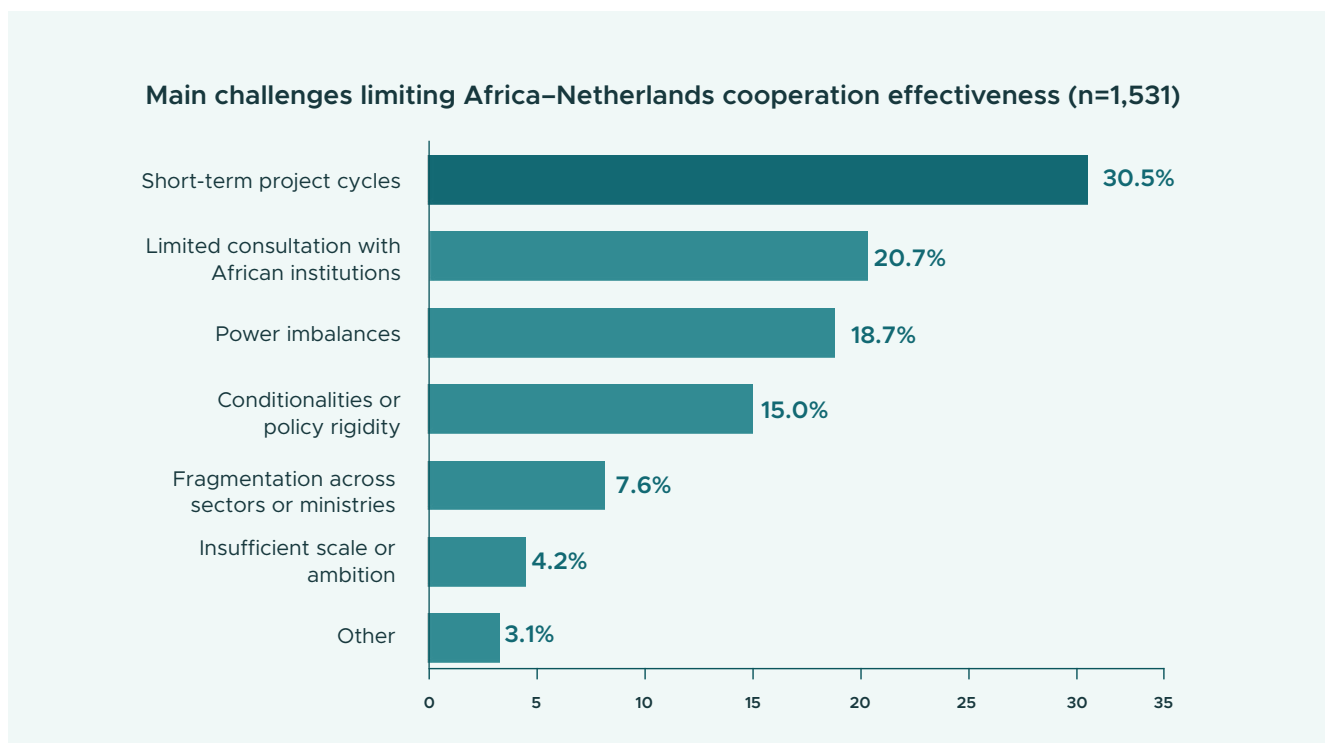


Figure A.7: Main challenges limiting Africa–Netherlands cooperation effectiveness

Respondents were asked to identify their single most important challenge. Four challenges emerged as particularly prominent, together accounting for 84.9% of the 1,531 valid responses. In other words, nearly nine in ten respondents identified one of these four issues as their primary challenge, pointing to a relatively concentrated set of concerns rather than a wide dispersion across the seven options.

Short-term project cycles (30.5%), limited consultation with African institutions (20.7%), power imbalances (18.7%), and conditionalities or policy rigidity (15.0%) together account for 84.9% of valid responses to the question. This concentration is analytically significant. We interpret these four responses as pointing toward a common structural condition: a cooperation architecture in which donor priorities, donor timelines, and donor accountability requirements are the fixed points around which everything else must organise itself, and in which African partners occupy a fundamentally responsive rather than generative role.

Short project cycles mean that relationships cannot compound. Limited consultation means that African priorities enter the process late, if at all. Power imbalances may limit the ability of African partners to influence outcomes when interests diverge. Conditionalities mean that access to funding is contingent on compliance with frameworks that may not fit the context. Each of these challenges reinforces the others, and none of them can be meaningfully addressed without addressing all of them.

What is equally telling is what does not appear near the top of this list. Insufficient scale or ambition ranks sixth at just 4.2%. Within this survey, respondents were much more likely to identify governance and partnership-design issues than insufficient scale or ambition as the primary challenge. This suggests that changing the terms of cooperation may be at least as important to respondents as increasing its scale. More funding delivered through the same architecture, without addressing these design issues, risks replicating the same challenges at greater scale.

A.6 Funding Architecture: What African Stakeholders Want

A.6.1 Adaptive Locally-responsive Funding

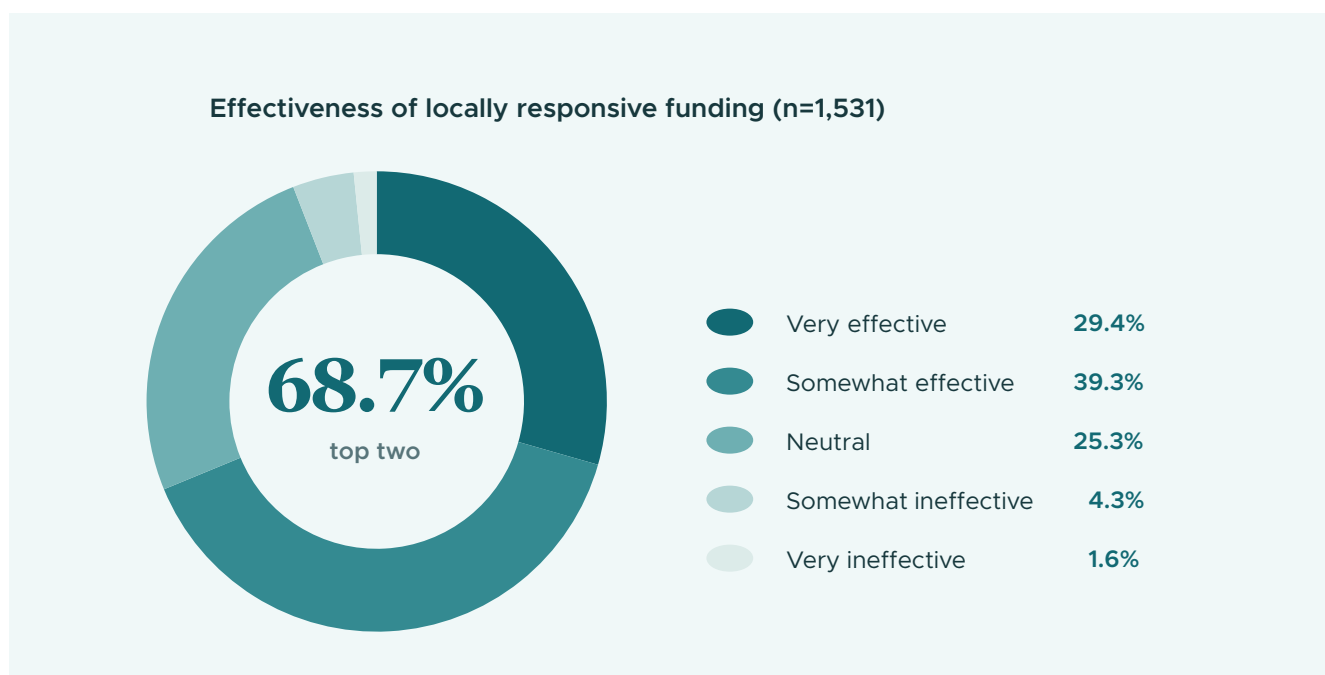


Figure A.8: Effectiveness of adaptive, locally-responsive funding models

68.7% of respondents consider adaptive, locally responsive funding models effective or very effective. Only 5.9% consider them ineffective. It is important to understand what it describes. Adaptive, locally responsive funding means the ability to adjust programme activities in response to changing conditions on the ground, without requiring prior donor approval⁹. It means trusting that the organisations delivering the work are better placed than a headquarters in The Hague or Brussels to judge what needs to change and why.

This is the funding approach that received the strongest effectiveness rating among the

approaches assessed in the survey, and it is precisely the modality that short project cycles, rigid indicator frameworks, and centralised compliance requirements make structurally difficult to operationalise. Participants in the companion roundtable described this modality as difficult to operationalise within current Dutch and EU funding arrangements; this gap warrants further investigation. In our interpretation, that gap is better characterised more as a design issue than a communication issue. In the five country study,¹⁰ this project will test alternative explanations directly.

⁹ OECD. (2026). *Practical Guidelines for Supporting Locally Led Development: Menu of Options for Shifting Agency and Resources to Local Actors*. OECD Publishing.

https://www.oecd.org/en/publications/practical-guidelines-for-supporting-locally-led-development_eaefc72b-en.html

¹⁰ <https://include-projects.vercel.app/include-africa-perceptions.html>

A.6.2 Multi-year Funding Commitments

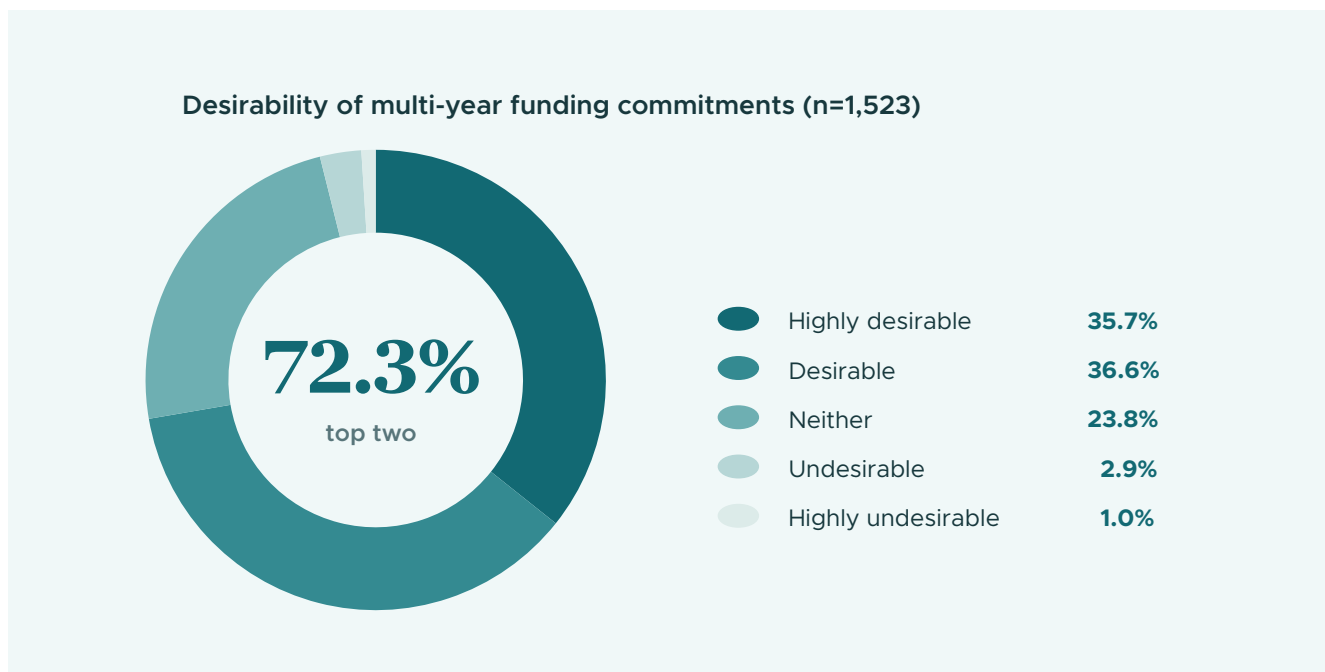


Figure A.9: Desirability of multi-year funding commitments

Longer-term funding emerges as a clear priority among respondents. Nearly three-quarters (72.3%) consider multi-year funding commitments desirable or highly desirable, while only 3.9% consider them undesirable. The preference is consistent across the main respondent groups, particularly among national government and regional/continental institutions. This points to a broad demand within the sample for funding approaches that provide greater continuity and predictability.

The survey has now delivered two findings on the same structural problem from opposite directions. Short-term project cycles are the most frequently cited challenge to cooperation effectiveness. Multi-year funding commitments are the most strongly preferred funding modality. The survey provides clear evidence of a strong respondent preference for longer funding cycles. Whether this preference can be translated into policy depends on institutional, budgetary and political considerations beyond the scope of the survey.



A.6.3: Donor-controlled Funding Models

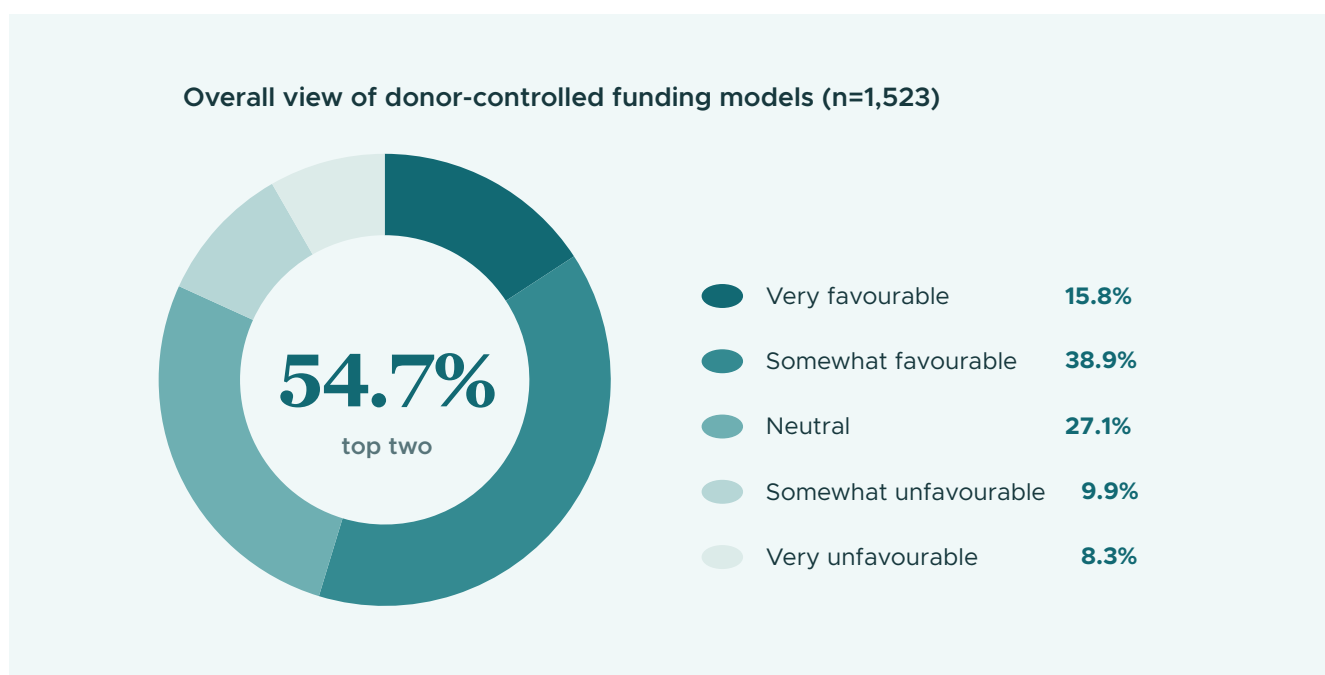


Figure A.10: Overall view of donor-controlled funding models

A majority of respondents (54.7%) have a favourable view of donor-controlled funding models, while 27.1% are neutral and 18.2% are unfavourable. This suggests that donor oversight is not necessarily viewed negatively in itself.

However, the question asked about donor-controlled funding as a general model, rather than about how Dutch funding is actually managed. The finding therefore does not mean that respondents endorse all forms of donor control in practice. The 45.3% who are neutral or unfavourable, together with the 30.5% who identify short project cycles and 20.7% who identify limited consultation as their primary challenges, points to a possible distinction between **accepting oversight in principle and questioning how that oversight is exercised**.

This distinction is important for interpreting the wider findings. The survey suggests that the concern may be less about whether donors have a role in setting standards and ensuring

accountability, and more about whether funding arrangements allow African partners sufficient voice, flexibility and influence in how programmes are designed and implemented.

The survey includes fewer questions about the EU than about the Netherlands. The EU findings should therefore be treated as context rather than as a comprehensive assessment of the EU. This comparison is nevertheless useful because Dutch development cooperation operates within a wider European policy environment. Looking at how respondents perceive the EU, alongside how they perceive the Netherlands, helps identify which aspects of the relationship may reflect the Netherlands' own bilateral approach and which may be associated with the broader European system.

The comparison therefore provides a useful basis for understanding where the Netherlands is seen as distinctive and where it is perceived as part of the wider European partnership landscape.

A.7 Perception of the European Union

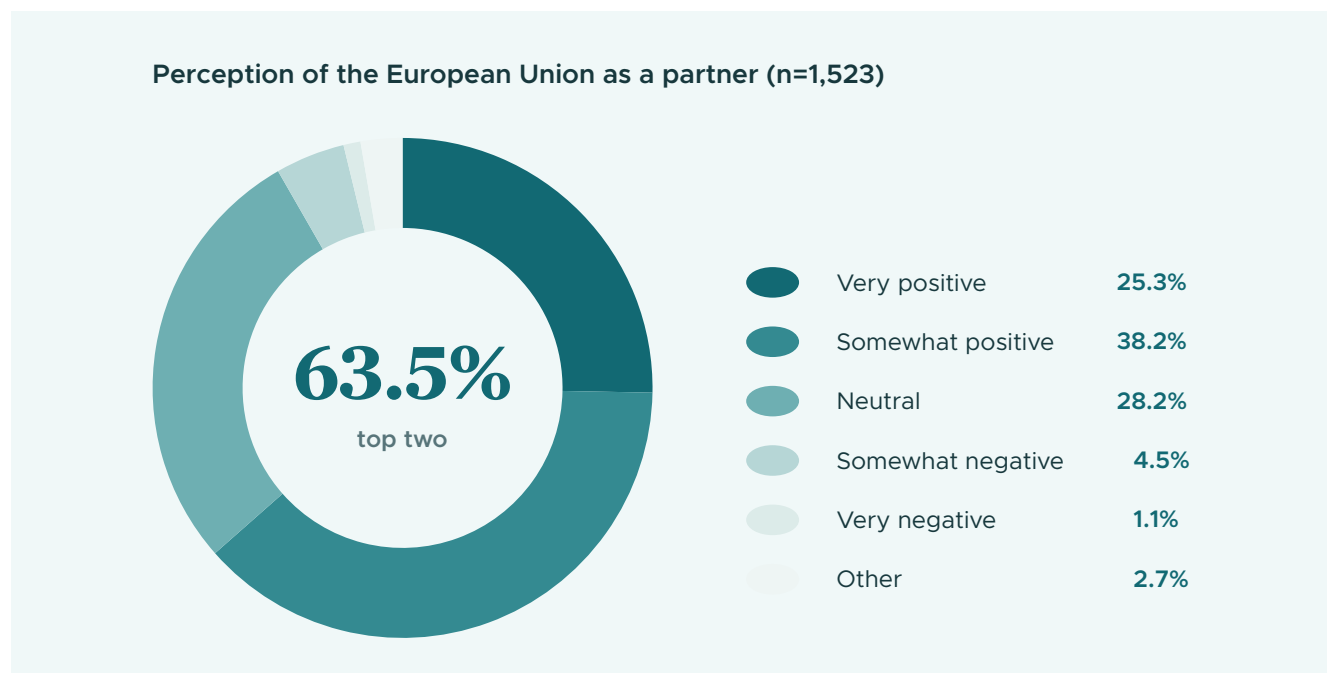


Figure A.11: Overall perception of the EU as a development and strategic partner

Respondents most often associate the EU with its scale, institutional reach and regulatory influence. Funding and programmes account for 25.3% of responses, followed by multilateral and institutional partnerships at 23.4% and regulatory and standards influence at 21.2%. Together, these three features account for nearly 70% of responses.

By contrast, only 10.2% identify the EU's normative or values-based approach as what most distinguishes its engagement in Africa. The finding suggests that, within this survey sample, the EU is recognised more for what it can mobilise and influence than for the values or principles it

promotes. Its institutional and regulatory footprints appear to be more visible to respondents than its normative framing.

This also provides useful context for understanding where a country such as the Netherlands may be able to offer something different. Rather than competing with the EU on scale and institutional reach, there may be greater value in building on areas where a bilateral partner can offer closer relationships, specialised expertise and more direct engagement.

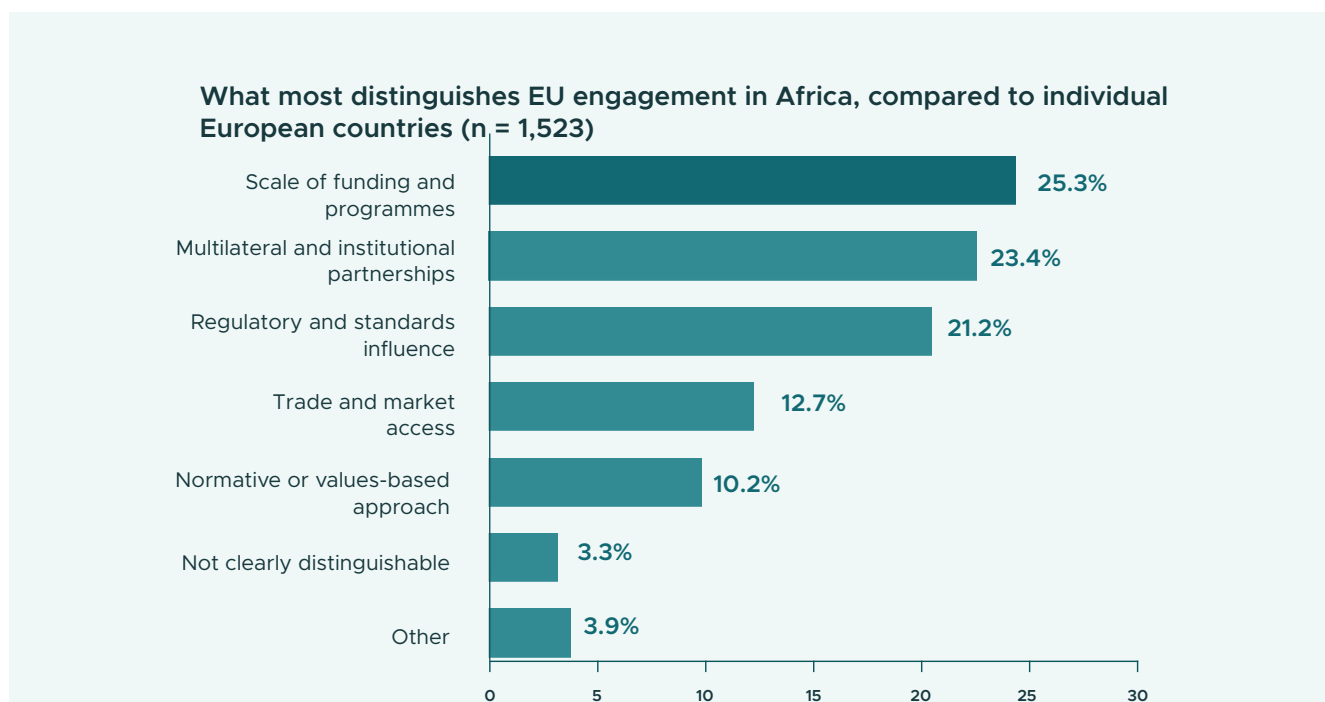


Figure A.12: What most distinguishes EU engagement in Africa



A.8 The Netherlands and the EU Compared

The comparison with the EU highlights where the Netherlands may be able to build on its own strengths. The Netherlands is unlikely to compete with the EU on scale, regulatory influence or multilateral reach. Its distinctive contribution may instead lie in the quality of its bilateral relationships, sector-specific expertise, ability to adapt to local contexts, and investment in knowledge and human capital.

The survey provides some support for this direction. Among respondents directly involved in Dutch-supported programmes, 83.4% report positive perceptions of the Netherlands. The

survey does not, however, establish which aspects of the relationship account for these more favourable views.

The broader finding is that direct engagement is associated with a substantially more positive perception of the Netherlands. This suggests that maintaining strong relationships, knowledge exchange and meaningful engagement may be important to preserving the Netherlands' distinct identity as a partner within the wider European landscape.

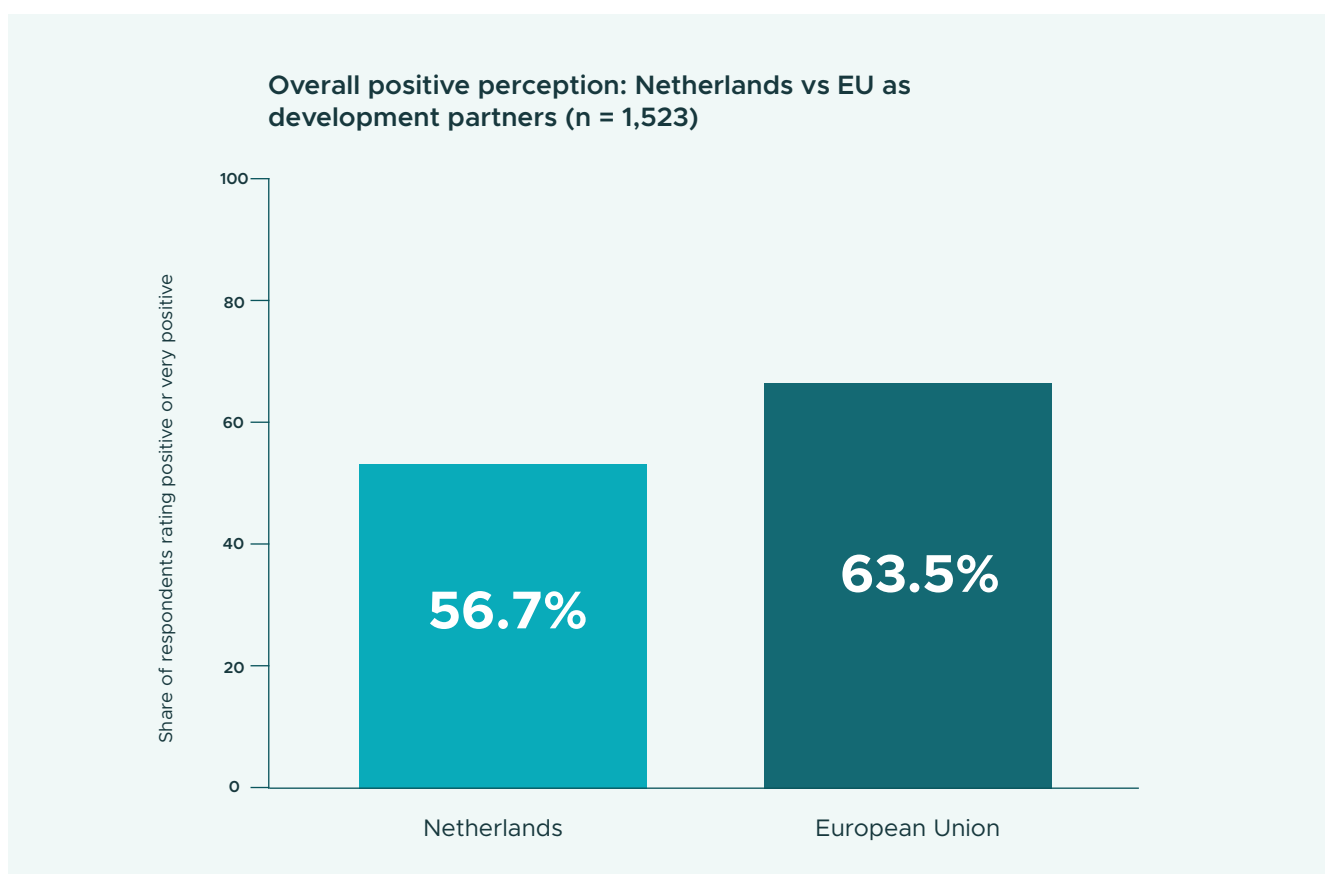


Figure A.13: Positive perception: Netherlands vs EU (n=1,524)

A.8.1 Distinctiveness: Recognised Where Present, Invisible Where Absent

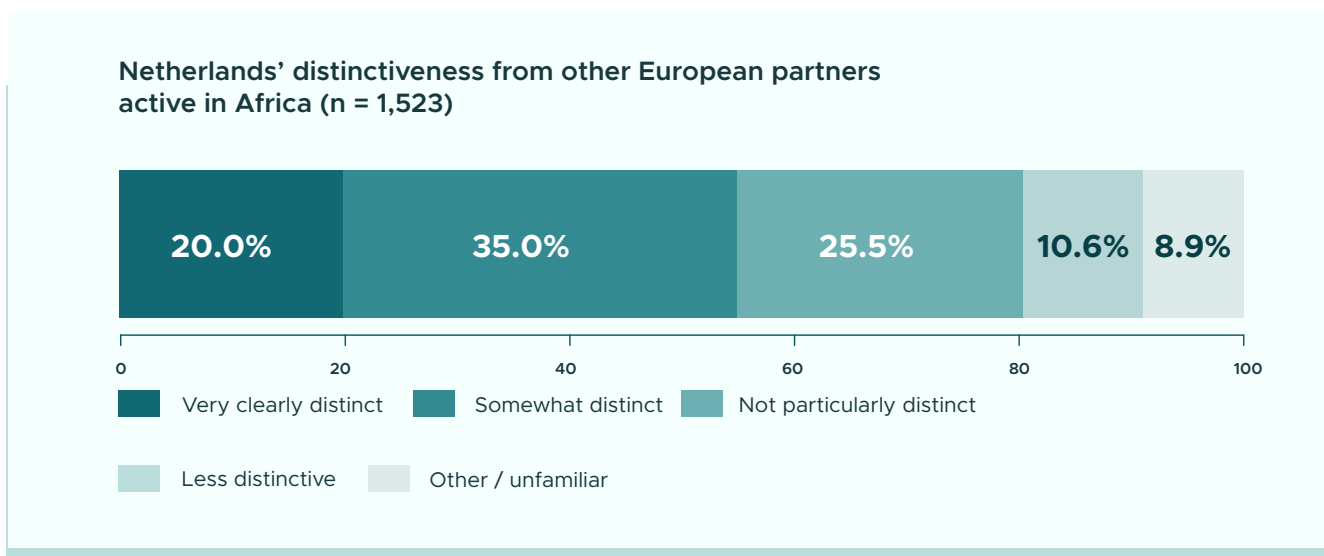


Figure A.14: Netherlands distinctiveness from other European partners

The Netherlands' distinctiveness appears to be much stronger among people who have direct experience of Dutch-supported programmes. Almost half (49.6%) of respondents directly involved in these programmes describe the Netherlands as very clearly distinct from other European partners. Across the full sample, however, only 20.0% share this view, while 25.5% see no particular difference and 10.6% consider the Netherlands less distinctive.

This suggests that the Netherlands' particular strengths, including its technical expertise, relationships and partnership approach, are more visible to those who experience them directly than to stakeholders who engage with the Netherlands at a distance. In other words, **Dutch distinctiveness appears to be experienced more than it is recognised.**

This matters because a strong bilateral reputation may depend heavily on continued opportunities for direct engagement, professional relationships and knowledge exchange. If these channels become narrower, the Netherlands may become less visible as a distinctive partner and increasingly be perceived simply as part of the wider European partnership landscape.

The survey does not establish that reduced engagement would cause this shift, but the pattern highlights the importance of maintaining the relationships and forms of engagement through which the Netherlands' distinctive contribution is experienced.

Methodological Notes and Limitations

This section sets out the methodological notes and limitations for the survey.

- » Every percentage and figure caption in Section A is calculated on the valid n shown in each section.
- » **Sampling and recruitment:** Respondents were recruited through the AU=ECOSOCC. Recruitment was network-based rather than probability-based, and the relative reach of these networks across countries is not known.

Methodological Limitations

- 1 Survey sampling and representativeness.** The survey was conducted online and captures respondents reached through the survey process. It is not a probability sample and therefore should not be interpreted as statistically representative of African policy stakeholders or African populations generally.
- 2 Cross-sectional design:** The survey identifies associations and perceptions at one point in time. It cannot establish causal relationships or changes over time.
- 3 Self-selection:** Respondents who chose to participate may differ systematically from stakeholders who did not participate.
- 4 Question-specific denominators:** Valid n varies by question because of missing or corrupted responses. Percentages should be interpreted using the denominator reported for each question.
- 5 Definition of “policy stakeholders”:** For purposes of this report, “policy stakeholders” refers to respondents from the institutional categories recorded in the survey instrument ; government, diplomatic, regional/continental, civil society, academic, private-sector and development-partner respondents; and should not be read as synonymous with African nationals or African civil society organisations specifically.

What This Survey Raised: Questions the Subsequent Outputs Will Address

This survey was designed as a diagnostic instrument. Its purpose was to establish broad patterns across a large group of policy stakeholders and surface the questions that more targeted evidence will need to answer. That is

what it did. Several findings in the pages that follow are, on their own, incomplete. They identify something significant without being able to explain it. The subsequent outputs of this research programme were designed to do exactly that.

The engagement gradient is the clearest example. Respondents directly involved in Dutch-supported programmes are far more positive than those with no direct contact. The survey cannot tell us whether direct engagement causes more favourable views, or whether respondents who already hold positive views are more likely to seek or be selected for direct engagement. The five Country Studies, covering Nigeria, Ghana, Kenya, Senegal and South Africa, will test this directly in context and provide the causal texture the survey cannot.

The trust finding raises a parallel question. More than half of survey respondents rate the Netherlands as more trustworthy than other international partners, yet the survey also records deep structural dissatisfaction with the terms of cooperation. Whether these two positions reflect different dimensions of trust, or something else entirely, is a question the Evidence Synthesis Report and AU-ECOSOCC Roundtable Report will seek to address.

The partial alignment finding, with 30.3% of respondents describing Dutch engagement with African-owned frameworks as only partial, points

to a gap the survey cannot locate with precision. Where it falls, in which sectors, at which stages of programme design, and whether it is consistent across countries or concentrated in particular contexts, are questions the Country Studies and Roundtable Report will take further.

The survey also has a structural blind spot. It reaches institutional policy stakeholders. It does not reach the African communities those programmes serve, the next generation forming its views about European partners on TikTok and Facebook, or the level of political leadership at which the architecture of African-European cooperation is negotiated and financed. The Digital Listening Report will address the first two. The Statesman Interview Report, drawing on serving and former African heads of state and vice presidents, will address the third.

The questions this survey raised are the questions the study was built to pursue. Readers who encounter a finding in Section A and want the explanation should look to the outputs that follow.

Concluding Synthesis

The survey presents a relationship that is broadly positive, but not without tensions. More than half of respondents describe the Netherlands positively as a development partner (56.7%), while 50.4% consider Dutch cooperation more trustworthy than that of other international actors. At the same time, respondents identify short-term funding cycles, limited consultation, power imbalances and conditionalities as the main obstacles to effective cooperation. These four issues account for 84.9% of responses to the question on the main challenge.

The analytical framework helps us understand why these views can exist alongside one another. Experiences at the **project level**, such as direct engagement, funding arrangements and how programmes are implemented, shape how respondents experience the partnership. These experiences sit within wider **structural conditions**, including who sets priorities, how funding is controlled and how much influence African partners have over decisions. The **historical dimension** provides a broader context for questions of ownership, agency and trust, although the survey does not directly measure the influence of historical factors.

The same pattern appears in the findings on funding. Respondents clearly value longer-term and more flexible forms of cooperation. 72.3% consider multi-year funding desirable or highly desirable, while 68.7% view adaptive, locally responsive funding as effective or very effective. These preferences sit alongside the finding that short-term project cycles are the most frequently identified challenge to cooperation.

The survey also shows that perceptions vary considerably with the depth of engagement. Positive perceptions are much more common among respondents directly involved in

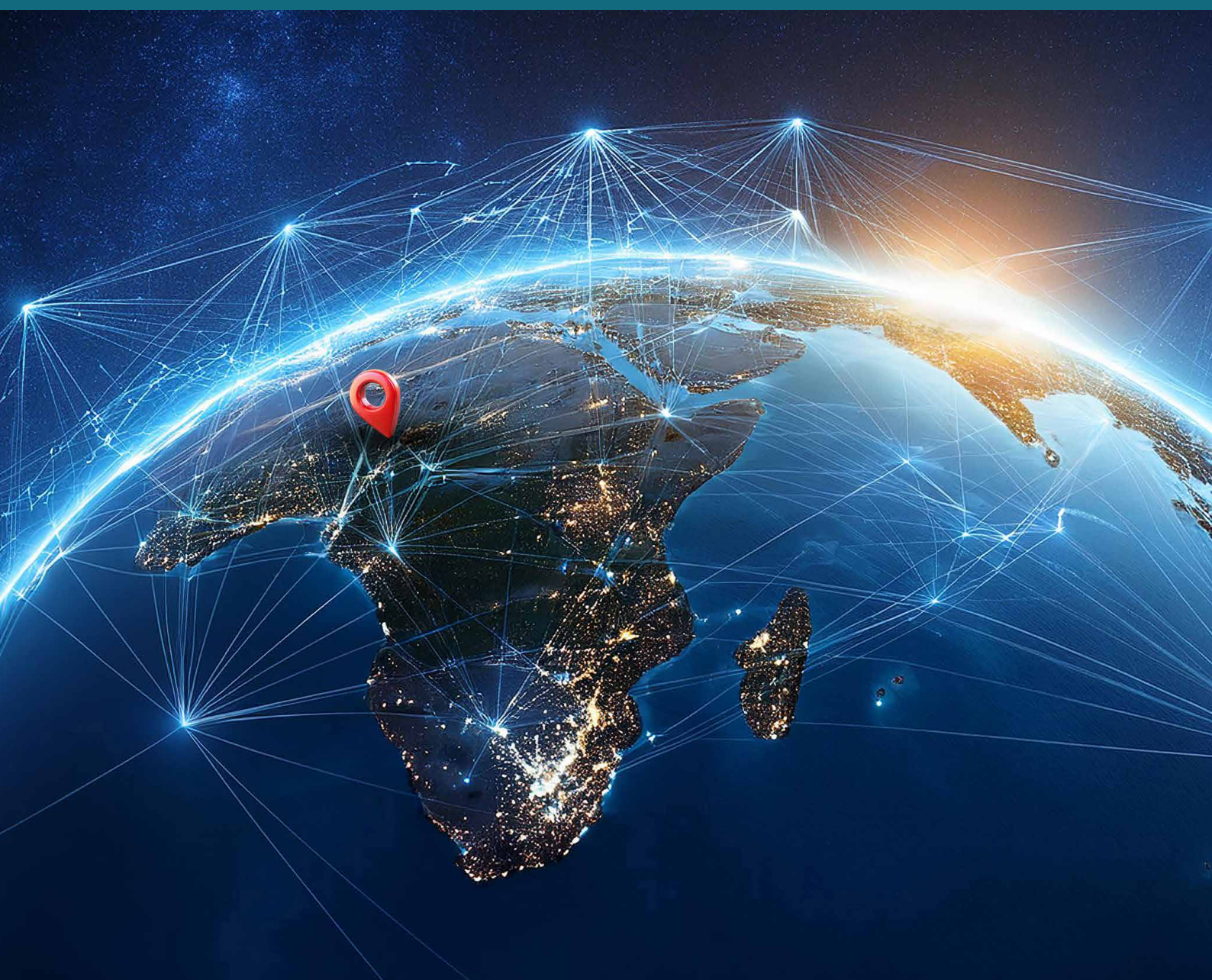
programme implementation than among those with little or no direct contact. The survey cannot conclude for all African stakeholders but the pattern is substantial and warrants attention.

The broader picture is therefore more nuanced than a simple positive or negative assessment of Dutch cooperation. Respondents recognise areas where the Netherlands is trusted and seen to contribute effectively, while also expressing clear expectations about how the relationship should work. For many respondents, the issue is not whether cooperation is valuable, but whether it provides sufficient space for African priorities, longer-term relationships, flexibility and meaningful participation in decisions.

This is where the analytical framework is most useful. It allows the findings to be read as different parts of the same relationship: **trust and effectiveness are closely linked to how cooperation is experienced, while ownership, power and financing shape the conditions under which that experience takes place**. The survey therefore provides evidence of a relationship that has considerable credibility among some programmatic stakeholders, but regarding the terms of that relationship, much remains to be desired.

About INCLUDE

INCLUDE is a knowledge platform based in the Netherlands that connects researchers, policymakers, civil society, and practitioners to generate evidence for more inclusive and effective development cooperation. Working with partners across Africa and Europe, INCLUDE translates research into policy dialogue and practical action on issues such as governance, economic development, social inclusion, and international partnerships.





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