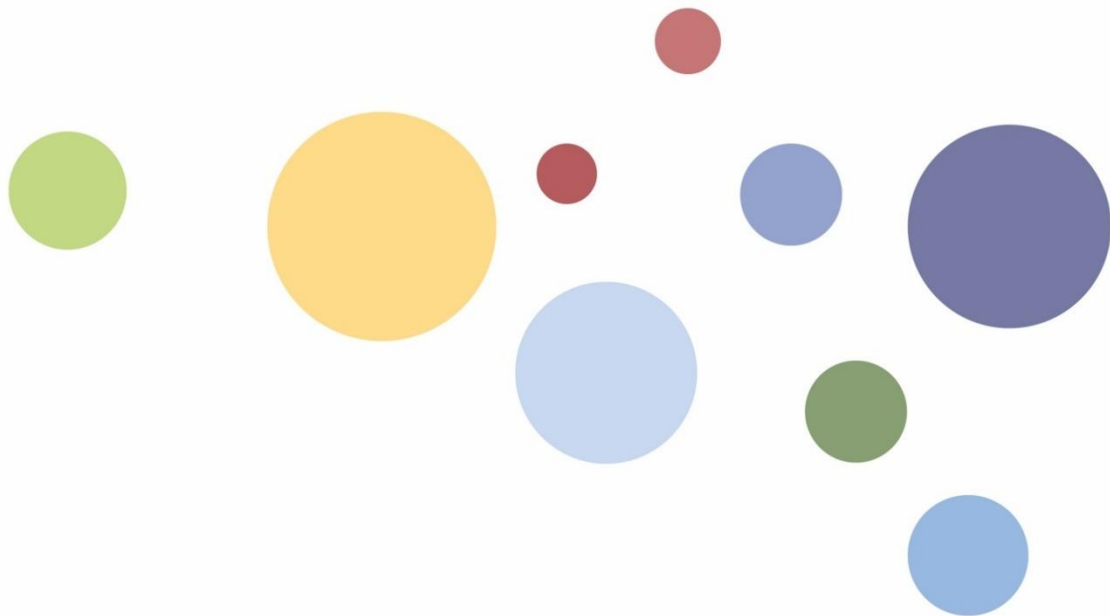


When Disinformation Becomes Foreign Policy

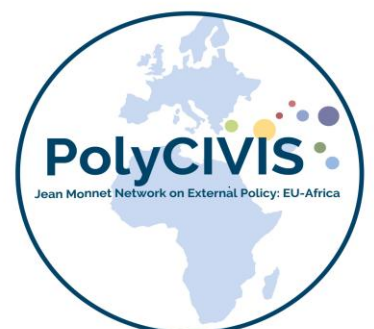
Information Disorder as a Geopolitical Risk Multiplier: The United States-South Africa Case, 2025-2026

Policy brief no.21
September 2026

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Executive Summary

Disinformation is no longer a contained domestic challenge. It has become a mechanism of foreign policy formation. This brief argues that false and misleading claims, once amplified by political elites and digital platforms, migrate across borders and reshape interstate relations. Disinformation acts as a geopolitical risk multiplier: it erodes domestic democratic trust while driving diplomatic isolation, market uncertainty, and bloc realignment abroad.

This brief examines this dynamic through the case of United States–South Africa relations between January 2025 and January 2026. Unverified claims of a “white genocide” against Afrikaner farmers, first circulated within South African right-wing political circles, were adopted by the Trump administration and used to justify a sequence of punitive foreign policy measures: an executive order granting refugee status to Afrikaners, a 30% tariff on South African exports, a boycott of South Africa’s G20 presidency, and South Africa’s exclusion from the 2026 G20 summit in Miami. Independent data from South Africa’s police service, from the Institute for Security Studies, and from AfriForum itself contradict the genocide claim. The case demonstrates how a domestic conspiracy theory, once elevated by a foreign government, can reconfigure diplomatic relations, trade policy, and multilateral standing regardless of its evidentiary basis.

The brief addresses three central questions: How does disinformation cross the threshold from domestic political discourse into formal foreign policy? What tools are available to states seeking to counter this migration without compromising free expression? And what role can Africa-produced data and AI infrastructure play in strengthening the continent’s epistemic position within global information governance?

Key recommendations include the establishment of rapid diplomatic rebuttal mechanisms, sustained investment in strategic public communication, formal partnerships between government and independent fact-checking bodies, narrowly defined and judicially reviewable disinformation regulation, and continued investment in African-led AI training datasets to correct systemic underrepresentation in global content moderation systems. States that fail to recognise disinformation as a structural foreign policy risk, rather than a communications inconvenience, will remain exposed to the dynamic that reshaped South Africa’s standing in 2025.

Key messages

- ❖ **Disinformation now functions as an instrument of foreign policy:** false or misleading claims, once amplified by political elites and digital platforms, can cross borders and directly shape tariffs, summit participation, and trade access—not only domestic opinion.
- ❖ **The 2025–2026 US–South Africa case shows a repeatable mechanism:** a domestic “white genocide” narrative, contradicted by official crime data and independent fact-checks, was adopted at head-of-state level and converted into concrete diplomatic and economic penalties.
- ❖ **Democratic states need structured rebuttal capacity:** rapid, evidence-based diplomatic responses; proactive transparency on crime, land, and demographic data; and formal partnerships with independent fact-checkers are essential to prevent unverified narratives from hardening into policy.

(1) Introduction

Disinformation research has traditionally concentrated on its domestic effects: eroded trust in institutions, polarised electorates, and weakened democratic participation. Its role in shaping foreign policy and interstate relations remains comparatively under-theorised, despite growing evidence that false narratives now travel directly into diplomatic arenas.

This brief addresses that gap. It asks how information disorder, defined as the spread of false or misleading content regardless of intent, operates as a geopolitical risk multiplier under polycrisis conditions, where overlapping crises amplify each other's effects. It further explores what evidence-based tools exist for states to counter this dynamic without infringing on legitimate speech, and how questions of data sovereignty intersect with the broader project of countering disinformation on the African continent.

The brief uses the deterioration of United States–South Africa relations across 2025 and into 2026 as its central case. This case was selected because it offers a documented, traceable sequence: a domestic conspiracy theory entered formal diplomatic exchange at the highest level, in an Oval Office meeting between two heads of state, and subsequently produced measurable foreign policy consequences, including tariffs, a G20 boycott, and threats to South Africa's continued participation in the African Growth and Opportunity Act (AGOA). Few cases offer this degree of visibility into the mechanism by which disinformation converts into policy.

The analysis draws on official government statements, South African crime data, independent fact-checking investigations, and existing scholarship on disinformation regulation and free expression. It leads to a set of recommendations, developed in the brief's final sections, calibrated for democratic states, multilateral institutions,

and African policymakers seeking to build resilience against this risk.

(2) Background and Analysis

2.1. Disinformation as a geopolitical risk multiplier

Polycrisis conditions, in which economic, political, and security crises interact and compound one another¹, create fertile ground for disinformation to travel beyond domestic borders. Established disinformation research treats false and misleading content chiefly as a threat to electoral integrity and social cohesion. This framing understates a second effect: disinformation's capacity to distort the assumptions on which foreign policy is made. When political elites in one country adopt and amplify claims originating in another country's domestic discourse, those claims acquire diplomatic weight independent of their factual basis. The result is a cascading risk. Domestic legitimacy erodes in the state where the narrative circulates, while diplomatic isolation and bloc realignment accumulate in the state that becomes its target.

2.2. Method and evidence base

This brief's case study draws on four categories of source material. First, official government and institutional statements: South Africa's 2025 Expropriation Act and government responses to it, the White House's 7 February 2025 executive order on Afrikaner refugee admission, and the US Department of State's account of its refugee determination. Second, primary documentation of the 21 May 2025 Oval Office meeting between President Trump and President Ramaphosa, including the video footage and printed material Trump presented during that meeting. Third, independent crime and demographic data, principally South African Police Service

¹ Lawrence et al. 2024

statistics for April to December 2024, farm murder figures maintained by the Transvaal Agricultural Union, a body sympathetic to Afrikaner farmers, and figures published by AfriForum itself. Fourth, contemporaneous fact-checking investigations published by CNN, PBS NewsHour, NPR, and Axios, each of which cross-referenced the images and statistics Trump presented against their original sources. Triangulating a government-sympathetic source, the Transvaal Agricultural Union, against official crime statistics allows the brief to establish the scale of the underlying phenomenon without relying on a single, potentially partisan, dataset.

2.3. The case: from domestic narrative to foreign policy instrument

The claim that white South African farmers face a coordinated campaign of killing and land seizure predates the Trump administration. It has circulated for over a decade within Afrikaner advocacy organisations, notably AfriForum and Solidarity, and within broader white nationalist networks internationally, where it forms part of a wider "great replacement" narrative.² What changed in 2025 was its adoption at the level of head of state.

South Africa's Expropriation Act, signed into law in January 2025, empowers the state to expropriate land without compensation under defined circumstances, as part of a long-standing effort to redress apartheid-era land ownership patterns that still leave the large majority of privately held land in white hands. No expropriations without compensation had taken place under the Act by mid-2025, according to South Africa's own commercial farmers' association.³ The Trump administration nonetheless cited the Act as

grounds for freezing aid to South Africa in February 2025, then signed an executive order prioritising Afrikaners for refugee resettlement, a decision that stood out starkly against the administration's simultaneous suspension of refugee admissions from nearly every other origin country.⁴

The claim reached its most visible expression on 21 May 2025, when Trump used a montage of images and articles to confront Ramaphosa in the Oval Office, asserting that white farmers were being killed and their land confiscated.⁵ Independent review found the material misleading. One image Trump described as a burial site of over a thousand murdered farmers was traced to a 2020 roadside memorial for two murdered farmers, and a separate video was traced to unrelated violence in the Democratic Republic of Congo.⁶ South African government data for the period cited put total murders at 19,696, of which 36 had any connection to farms and seven victims were farmers.⁷ Analysts at the Institute for Security Studies and the University of Johannesburg independently concluded that no evidence supported a claim of coordinated, race-based killing meeting the legal threshold of genocide.⁸

The diplomatic consequences followed a clear sequence rather than a single rupture. Tensions escalated through mid-2025, and in August the administration imposed a 30% tariff on South African exports, placing South Africa among Washington's most heavily tariffed trading partners.⁹ In November, the United States boycotted the G20 summit hosted in Johannesburg, the first G20 summit held on African soil, citing South Africa's treatment of its farmers among its objections.¹⁰ Six heads of state, including Trump, were absent from the summit

² Coaston, 2025

³ Axios, 2025

⁴ PBS News, 2025a

⁵ NPR, 2025

⁶ Axios, 2025

⁷ CNN Politics, 2025

⁸ PBS News, 2025a

⁹ DAWN, 2025

¹⁰ Al Jazeera, 2025

altogether.¹¹ Trump subsequently announced that South Africa would not participate in the 2026 G20 summit under US chairship, and that the administration would review South Africa's continued eligibility for preferential trade access under AGOA.¹² Each of these measures cited, in whole or in part, a narrative that independent data does not support. This is the marker distinguishing this case from ordinary diplomatic friction: policy consequences accrued to a state on the basis of a claim its own evidentiary record cannot sustain.

(3) Counter-disinformation measures and the free speech constraint

States confronting this dynamic face a genuine trade-off. Regulatory responses to disinformation, even when adopted for defensible reasons, risk normalising restrictions on legitimate speech, and authoritarian governments have cited democratic states' own disinformation laws to justify unrelated crackdowns.¹³

Comparative research across Germany, Brazil, Singapore, and Ukraine identifies precision in defining prohibited content as the decisive variable separating proportionate regulation from overreach. Vague standards invite selective enforcement; narrow, evidence-based standards, subject to judicial review, do not.¹⁴ Huang¹⁵ further argues that disinformation, understood as deliberate falsehood rather than sincere but mistaken opinion, does not carry the same democratic claim to protection as authentic political speech. However, she cautions that regulators must be able to distinguish the two reliably in practice, a distinction that is easier to state in principle than to operationalise in law.

This tension is acute for South Africa's specific situation. The claims driving the case examined here did not originate with the South African state. They originated with foreign advocacy organisations and were amplified by a foreign government. South Africa's available countermeasures are therefore primarily diplomatic and communicative rather than regulatory, since it cannot legislate against speech originating in Washington.

Regulatory tools remain relevant primarily at the platform layer, where the same false claims circulated and where content moderation systems, trained predominantly on data reflecting the Global North, are demonstrably less capable of identifying and contextualising harmful content in African languages and African political contexts.¹⁶ This gap argues against indiscriminate content removal and instead supports targeted investment in better-calibrated moderation systems, discussed below.

(4) Data sovereignty and the epistemic equity gap

A further structural constraint compounds the risk. Large language models and automated moderation systems remain trained overwhelmingly on datasets drawn from the Global North. Independent research has found that African languages, cultural context, and political nuance are systematically underrepresented in these systems, producing misclassification and, at times, the invisibility of harms specific to African contexts.¹⁷

Grassroots initiatives such as Masakhane have begun to close this gap, producing open benchmarks and datasets covering more than one hundred African languages.¹⁸ Their work remains under-resourced relative to the

¹¹ Atlantic Council, 2025

¹² PBS News, 2025c; DAWN, 2025

¹³ Jankowicz & Pierson, 2020

¹⁴ *Ibid.*

¹⁵ Huang, 2026

¹⁶ Wits University, 2026

¹⁷ Global Voices, 2026

¹⁸ OECD, 2026

scale of the problem. Strengthening Africa-produced datasets is therefore not a peripheral technical concern, it is a precondition for African states to contest disinformation narratives, including narratives

directed against them, on equal epistemic footing.

(5) Policy Recommendations

The following recommendations are prioritised by feasibility and by their direct bearing on the mechanism identified above: the migration of unverified domestic narratives into formal foreign policy instruments.

1. Establish rapid diplomatic rebuttal mechanisms. Foreign ministries should maintain a standing capacity to issue evidence-based, source-cited rebuttals within 24 to 48 hours of a disinformation claim entering diplomatic discourse, coordinated with national statistical agencies to ensure rebuttals draw on primary data rather than secondary commentary.
2. Invest in strategic public communication grounded in transparency. States should proactively publish disaggregated crime, land, and demographic data before disinformation narratives can exploit gaps in the public record, rather than responding defensively once a narrative has taken hold.
3. Formalise partnerships with independent media and civil society fact-checking bodies. Government rebuttals are inherently less credible with foreign audiences. Independent verification by outlets such as Africa Check, AFP Fact Check, or academic institutions carries more persuasive weight internationally and should be resourced accordingly.
4. Pursue narrowly scoped, judicially reviewable platform regulation. Any regulatory response to disinformation should define prohibited content with precision, include sunset clauses, and provide for judicial rather than purely executive review, to avoid the normalisation risk observed in comparative cases.
5. Expand investment in Africa-produced AI training datasets. Governments, universities, and regional bodies should scale support for initiatives such as Masakhane¹⁹ and equivalent African-language dataset projects, both to improve content moderation accuracy and to build the continent's independent capacity to identify and counter disinformation targeting it.
6. Coordinate multilaterally through the African Union and SADC. A continental early-warning mechanism for cross-border disinformation targeting African states, linked to the African Union's existing data policy framework, would reduce individual states' exposure to bilateral pressure of the kind South Africa experienced in 2025.

Implementation timeframe: Of these, the first three are immediately actionable within

existing institutional mandates and require no new legislation. The fourth requires a

¹⁹ Masakhane is a grassroots organisation whose mission is to strengthen and spur natural language processing (NLP) research in African languages, for Africans, by Africans. See more at <https://www.masakhane.io/>

legislative process and sustained attention to the free speech trade-off outlined above. The fifth and sixth are longer-horizon investments whose returns will accrue chiefly to future crises rather than the present one, but whose absence will leave African states structurally disadvantaged in the next disinformation-driven diplomatic confrontation.

(6) Conclusion

The United States-South Africa case demonstrates that disinformation is not a peripheral communications problem. It is a structural feature of contemporary geopolitics, capable of producing tariffs, diplomatic boycotts, and exclusion from multilateral fora on the basis of claims that a state's own evidentiary record does not support. The mechanism identified here, in which a domestic conspiracy theory acquires diplomatic weight once adopted by a foreign head of state, is unlikely to remain unique to this case. States with weaker institutional capacity than South Africa's, and with less international visibility, face a comparable or greater exposure.

Recognising disinformation as a geopolitical risk multiplier carries direct implications for how states organise their foreign policy

institutions. Rapid rebuttal capacity, proactive data transparency, and partnership with independent verification bodies belong in the standard toolkit of foreign ministries, not as ad hoc responses to individual crises. Regulatory tools carry real value but require careful calibration against the risk of normalising restrictions on legitimate expression, a risk that comparative evidence from Germany, Brazil, Singapore, and Ukraine confirms is not hypothetical.

The deeper structural fix lies outside any single state's foreign ministry. As long as the AI systems mediating global information flows remain trained predominantly on Global North data, African states will continue to operate at an epistemic disadvantage in contesting narratives directed against them, including narratives with no basis in their own official statistics. Closing this gap is a multi-year undertaking. It should begin now, before the next disinformation-driven diplomatic confrontation, rather than after it.

Further research should track whether the exclusionary measures applied to South Africa in 2025 and 2026 establish template other states adopt against African governments, and whether the multilateral early-warning mechanisms proposed here can be operationalised in time to matter.

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Acknowledgements



The CIVIS network is a consortium of 21 universities in Europe and Africa. In October 2023, it initiated the PolyCIVIS project, focused on confronting the Polycrisis in Europe and Africa through Research, Policy and Education. The PolyCIVIS project is funded by the European Union, Erasmus+.

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