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COMPETING WITH CHINA IN AFRICA

STRATEGIC SUGGESTIONS ON THE EU GLOBAL GATEWAY

D. A. Foretia, J. C. Kouam, R. Nantchouang, C. Soong, A. Vasselier and G. Wiegand

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Nele Fabian
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Authors
Denis A. Foretia, Jean Cedric Kouam, Robert Nantchouang,
Claus Soong, Abigaël Vasselier, Gunnar Wiegand

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Contact
Phone: +32 2 282 09 30
Fax: +32 2 282 09 31
Email: brussels@freiheit.org

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Introduction

Nele Fabian

In recent years, Europe's relationships have been transformed by shifting global power structures and their geopolitical implications. The rise of the increasingly autocratic People's Republic of China as a global power and its ongoing conflict and trade war with the United States contribute to the European Union's growing strategic isolation, challenging it to step up and stand its own ground in power politics. Doing so gradually shifts the EU's own identity from a previously mostly economic to a geopolitical power, and its main focus from competitiveness in trade to competitiveness in both trade and strategic influence.

European Commissioner for International Partnerships, Jutta Urpilainen recently accentuated the EU's emphasis on influence, when she told the Financial Times:

> *"We are living in an era of geopolitical competition. […] We face a battle of narratives, but more and more we face a battle of offers."*[1]

She implied that the EU has to make up for lost ground where it is no capable to counterbalance the four-dimensional challenge that Chinese influence-building presents: economic, political, security and ideological goals have become intertwined and, in China, are powered through connective digital technologies.[2]

Europe's future in geopolitics relies on the quality of its partnerships, especially on the African continent, where China's influence now significantly outweighs Europe's.[3] For the EU, it is the first time in decades that its economic partnership strategy is being so tightly associated with its dependency on China and related security concerns. Europe has only recently come to realize how much its global influence is ultimately limited by its diminished size of military power, and that its economic impact needs to be much stronger than it has been to compensate. In the United States and China, in turn, global development and security have long been defined as two complementary issues.[*]

Geostrategic investment – the role of the EU Global Gateway

One of the major instruments to "de-risk"[5] Europe's dependencies and join forces with alternative partners through investment in the Global South is the EU Global Gateway (GG) Initiative, which launched its first projects in 2023. Compared to previous investment programmes, GG sends a new geostrategic message: it seeks to provide an alternative to China's major investment program for development, the Belt-and-Road Initiative (BRI), and compete with China strategically in the Global South, especially on the African continent.

The EU and China are competing for the same goals, hoping that the integration and development of African markets will help revive their own economic stagnation. However, GG is suffering from a lack of recognition and real-time information on its performance.[6] This study presents an independent multi-perspective performance assessment after the launch of GG's big flagship projects, which provides impulses for an improvement of GG's impact strategy.

GG is being rolled out just at the right time, since China has been downscaling its BRI during the last years and has already left a large investment gap on the African continent.[7] At a time where China is re-evaluating its own role as an investor, Europe has the chance to fill the gaps and present itself not only as an independent global power but also as the more long-term reliable partner. Unlike China, which gives out credits fast but under conditions harsh enough to sometimes label them "financially aggressive", EU investment, which combines public and private finance models, is slow but durable, and comes at a much lower financial risk for partners.[8]

With the fronts between the United States and China hardening, the EU's decisive performance in the global sphere of power and influence is also going to strongly determine the future flexibility of the global order. After all, China its global leadership claim has not been recognized by many important countries, and no country can unilaterally change one its role.[9] Europe is currently the only large power that is neutral enough to contest China's power claim without risking an immediate destabilization of the global order.

Global Gateway's impact on partnership-building

During the last decade, Europe has recognized an increasing need for investments that enhance connectivity in all areas (industrial production, energy, mobility, and digital communication) to improve and integrate supply chains. Connectivity in these fields is paramount for Europe to stay competitive in all things future and green technology, and Global Gateway thus focuses especially on physical infrastructures in these fields.

Africa is even more vulnerable than the EU when it comes to digital technologies, as it depends almost entirely on foreign investment in order to build its basic digital infrastructure. Through them, Africa is setting itself up for innovation.[10] Africa is also predicted to be home to 2.5 billion inhabitants by 2050, which indicates that its influence will rise enormously. Europe's own population, in turn, is fast decreasing, which contributes to its loss of global influence.[11] Simultaneously, **the EU's authority over the connectivity with Africa is increasingly contested by Chinese influence on the continent, and the EU's future impact depends majorly on big initiatives like GG succeeding.**

During the upcoming years, GG's competitiveness depends largely on how well the EU is able to integrate both its own and its partners' goals. As this study and previously presented research show, Global Gateway is assessed with different degrees of enthusiasm on the African continent. Partner countries that embrace the EU's value-based approach are ready to deepen the relationship, while other countries seek more flexible partnerships that grants them value-independence.[12] African public discourses tend to identify a lack of African agency in existing partnerships with the EU, and accuse the EU of a prevailing paternalistic approach to project implementation.[13] Successful future partnerships will need to clear out misconceptions and find collaborative strategies that both sides can agree on without reservation. Communication is key here, and this study provides suggestions to explore the possibilities.

In addition, the narrative of competition with China is often perceived as problematic in Africa, since siding with either party could provoke losing investment from the other.[14] On the African continent, EU-China competition is strongly perceived as a 'power game' played out by two rivalling forces which might, in the future, impact African societies negatively. Linking development partnerships with the EU's own economic and security concerns indeed implies that development partnerships under the GG are affected by strategic bias, which the EU has traditionally pledged to avoid. Thus, in the future, partner societies cannot expect to remain unaffected from the EU's strategic interests.[15] Joint work on stabilizing and increasing the number of successful, durable partnerships, however, is going to contribute to reducing bias, aligning goals, and building trust. This study provides suggestions on how to address these issues with partners of the GG.

Aims and structure of the Study – suggestions on Global Gateway's competitive performance

With the first 90 projects launched in 2023,[16] and another 138 additional projects to be rolled out by the end of 2024,[17] the future success of GG is being shaped as we speak. Global Gateway has, by now, made its first big imprints. A close analysis of its competitive performance so far can help identify possibilities for structural improvement, and this study provides this analysis from a comparative perspective. **At the time of publication, the European Commission is setting itself up to set priorities for new term, 2025-2029. The timing is thus ideal time to set priorities for an improved implementation of the Global Gateway strategy, both mid- and long-term.**

This study provides a first comprehensive fact-check of intentions versus real impact from three different angles: an EU institutional, a pan-African, and a Chinese discursive perspective. A similar comparative analysis has not been presented in previous research. This study investigates GG's structural setup and competitive intentions for opportunities of improvement (Chapter 1), and compares them with GG's current impact on the African continent (Chapter 2) and competitive force as assessed by Chinese political elites and expert circles (Chapter 3).

Throughout the last years, the European Commission has received both acclaim and critique for GG's competitive setup. Since there is no inherent component in the design or implementation of projects themselves that is explicitly competitive, GG's messaging can sound somewhat ambivalent to third parties.[18] Ultimately, however, any state of competition is defined by a identification with it, and Chapter 3 of this study reveals that not only the European Union, but also China labels GG as highly competitive. As this study shows, knowledge of this fact is going to lead to more strategic fronts to incorporate into GG's framework, but it gives the EU a huge opportunity to proactively shape its own status by optimizing GG's impact. The main questions asked in this regard are:

→ How is GG's geopolitical messaging perceived in both Africa and China?

→ Does GG make the intended competitive impact that seeks to challenge China's BRI?

→ How can impact assessment serve to help make GG more geopolitically powerful?

The three chapters present their perspective individually and give case-related policy recommendations for EU decision-makers that include:

→ specific suggestions on GG steering and outcome control within the EU institutions (Chapter 1);

→ instructions on communicating GG more effectively in African countries to promote positive reception of EU funding, as opposed to Chinese funding (Chapter 2);

→ ideas on counterbalancing Chinese mis-conceptions of GG's geopolitical messaging to demonstrate European strategic independence (Chapter 3).

Key insights presented suggest EU decision-makers to:

→ tap more fully into GG's long-term competitive potential by optimizing and enhancing its steering structure;

→ strengthen partnerships by engaging partners at full possible scope and facilitating access to funds;

→ improve access to information, thus enhancing GG's legitimization in the eyes of critics;

→ send a more impactful geopolitical message by embedd-ing GG into a stronger and clearer strategic narrative.

The main results from the three chapters synthesized in the Executive Summary (p. 29), where additional policy recommendations are derived from implicit insights revealed by comparison. These recommendations point towards opportunities to sharpen GG's targeted messaging as a geostrategic tool. Applied knowledge of Chinese opinions on GG's competitive force, improved steering as well as optimized EU funding allocation[19] and partner engagement on the ground will sharpen GG as a geostrategic tool. Next up, its strategic narrative in Africa is going to be another major factor that can bring the initiative to full fruition.

If GG is to build and retain the impact in development, partnership, and influence it seeks to have, it is of great importance that the GG's goals, structural set-up and strategic messaging are as coherent as they can possibly be. It is equally important for Europe to demonstrate independence as a global power that remains neutral in the intensifying trade war between China and the United States, the consequences of which is also increasingly felt in Africa. The EU is an important alternative for African governments, and coming together with a strong intention to help each other benefit can be a huge stabilizing factor for both parties. Comprehensive economic partnership agreements, such as the one that the EU and Kenya have signed in 2023, help the EU de-risk and relocate important supply chains from China to other partners, while simultaneously bringing African partners much closer to the EU market. They, too, are presented with an opportunity to decrease dependencies on China. Significant potential the GG be optimized in all of these areas can be identified, and this study provides suggestions on how to address this.

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19 The currently biggest opportunity for optimization in GG's funding scheme lies in an improved framework under which companies that implement projects can proactively apply for EU warranty support. Cf. Emmrich, Wilhelm, and Heike Hoffmann, „EFSD+ erweitert Finanzierungsrahmen für Global Gateway," Germany Trade & Invest (GTAI) Special, published 9 August, 2024.

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1. China's Belt and Road Initiative and the EU's Global Gateway in a Geopolitical Context: From Synergies to Competition

Gunnar Wiegand

On 7 December 2023, President Xi Jinping stated at the EU-China Summit in Beijing that

> […] the Belt and Road Initiative (BRI) is an inclusive platform that has brought benefits to over 150 countries and their peoples. As the saying goes, when you give roses to others, the fragrance lingers on your hand. China will continue to promote high-quality Belt and Road cooperation, including by creating synergy between the BRI and the EU's Global Gateway to help developing countries grow faster.[1]

Are we looking at cooperation on the base of synergies, or is there increasing competition between two alternative initiatives? This question has been asked since the very beginning of the Belt and Road Initiative, launched by China in 2013. And it has been answered differently at the political level over the course of the last ten years. Several dimensions need to be considered: the evolving relationship between the EU and China; the EU's own internal approach to infrastructure development and its policy on regional, inter-regional, and global connectivity; differences between this EU policy and individual member states' approaches; the evolving international definition of sustainable connectivity; as well as the EU's and China's interaction with third country partners.

There is one common starting point for all, including China and the EU: the recognition of a **significant global infrastructure investment gap.** Both the BRI and the Global Gateway (GG) initiative, as well as similar connectivity initiatives intend to address this infrastructure gap, which is recognized as a barrier to economic development in emerging countries and as an obstacle to inter-connectedness—and thus to further globalization of economies and societies. In this context, the changing mentality of many development partners needs to be taken into account. Most look at the current geopolitical landscape as a marketplace from which to choose for their infrastructure investments. Price and speed matter, not only quality.

The G20 Global Infrastructure Hub estimates that the gap between the current investment trends and the investment needed for global infrastructure development will reach a deficit of USD 15 trillion by 2040. This figure climbs to USD 18 trillion when taking into account the infrastructure needed to address climate change impact and environmental degradation in accordance with the Sustainable Development Goals (SDGs).[2] In turn, the February 2019 World Bank report *"Beyond the Gap"* concludes that investments of 4.5% of GDP – USD 1.5 trillion annually – will allow developing countries to achieve their infrastructure-related SDGs. World Bank President Kristalina Georgieva stated then that "with the right choices, infrastructure can be built that helps achieve globally agreed emissions targets. The focus must be on smarter and more resilient investments, not necessarily more money."[3] Beyond these general assessments, the key questions to be asked are: **who invests where, how, and into which kind of infrastructure? This framework helps determining whether the investments made turn into a geopolitical competition, or a common global development effort.**

As Parag Khanna stated in his ground-breaking book on "Connectography" in 2016:

> […] the nature of geopolitical competition is evolving from war over territory to war over connectivity. Competing over connectivity plays out as a tug-of-war over global supply chains, energy markets, industrial production, and the valuable flows of finance, technology and talent. Tug-of-war represents the shift from a war between systems […] to a war within one collective supply chain system.[4]

The launch of the EU's Global Gateway initiative of 2021 is to be analyzed in this geopolitical "tug-of-war" framework, however, not without first taking a closer look at its trigger, the launch of the Belt and Road Initiative by China in 2013 as well as related EU and EU member states' responses and policy adaptations that we have observed since then.

From connectivity cooperation to conditional engagement: How the EU has changed its approach towards China's BRI between 2013 and 2020

China's Belt and Road Initiative was launched under the name "New Silk Road" in 2013, with President Xi Jinping announcing a "Silk Road Economic Belt" in Kazakhstan and a "21st Century Maritime Silk Road" in Indonesia in 2013. The BRI is designed to create a stable, interconnected market with China at its center, with fully integrated global supply and demand chains for a high-tech economy. It is thus part and parcel of President Xi Jinping's vision of China becoming a global leader in the 21st century and expanding its global influence by promoting China's vision of a new multipolar world order in a concrete way.[5] It was incorporated into the constitution of the Chinese Communist Party in 2017 and has a target date for completion in 2049, coinciding with the centenary celebrations of the foundation of the People's Republic of China. Among the main motivations to launch the BRI were a need to revitalize the economy of central provinces and to provide an alternative market to big Chinese state-owned enterprises beyond domestic infrastructure development, as well as the perceived need to establish alternative, secure trade routes with interdependence between participating states and the Chinese economy.

The BRI engages partner countries by building loan-funded infrastructure using Chinese companies, thus diversifying resource and energy supplies and creating new markets for China. It is implemented by the National Development and Reform Commission (NDRC), with direct investments provided for by the China Investment Corporation (CIC). The Silk Road Fund is a state-backed investment fund, which has primarily provided for investments in Africa. China has also become the largest sovereign bilateral lender in the world. Loans are often backed by a collateral. Frequent restructuring in heavily indebted countries (such as Pakistan, Sri Lanka, Tajikistan, Montenegro) is often necessary, with debts accumulating, and rescheduling resulting in increased political influence. The investments are not limited to developing countries, but extend also to the EU's Member States.[6]

It is estimated that by 2023, 10 years after the BRI announcement, cumulative BRI engagement had reached USD 1.053 trillion, with about USD 643 billion in construction contracts and USD 419 billion allocated as non-financial investments.[7]

To answer the question whether the Global Gateway initiative launched in 2021 is a European alternative to the BRI, or whether there can be co-operation and synergies between the two, three phases of interaction between the EU and China on connectivity can be distinguished:

- a short phase of open EU-China cooperation with connectivity synergies between 2013 and 2015;
- conditional EU engagement with China on the BRI between 2016 and 2020;
- competing approaches between the BRI and GG since 2021.

Transport connectivity cooperation between China and the EU was for the first time agreed in November 2013, as part of the new 2020 Strategic Cooperation Agenda. This Agenda identified many areas of concrete cooperation and was based on the 2003 EU-China "Comprehensive Strategic Partnership". Economic interdependence was steadily advancing and *cooperation* was the main word, with *multipolarity* as a shared outlook.

There was a concrete and positive attitude of mutual openness and cooperation on connectivity on both sides in 2014/2015, but this initial enthusiasm evaporated on the EU's side about two years later. In practice, work under the new EU-China Connectivity Partnership of 2015 did not really advance despite the good intentions stated at the 2015 EU-China summit. Too many negative reports, including from several member states, about the way BRI projects were conceived and implemented had reached Brussels and member states' capitals.

CRITICISM AND CONCERNS RELATED TO CHINA'S BRI PROJECTS

The human rights situation in China
Significant human rights violations, in particular as regards the Uyghur minority in Xinjiang, a key province for the BRI land routes, have been recorded.

Market access for European business in the People's Republic
The lack of possibilities for EU companies to meaningfully contribute under Chinese procurement practices was publicly denounced by the EU-China Chamber of Commerce in 2020.[8]

The situation in BRI beneficiary countries outside of the EU
Observers note a lack of environmental sustainability, a disregard for social sustainability with a lack of workers' rights in projects (which are often exclusively implemented by Chinese companies and workers), a disregard for international standards and rules, a lack of access for any other than Chinese companies, a lack of fiscal sustainability leading to unsustainable levels of indebtedness ("debt trap diplomacy"), and the practice of corrupting local decision-makers and counterparts.

Implementation of BRI projects in Europe
A disregard for the need to respect and apply EU standards, including in candidate countries, is observed, as well as a disregard to incorporate Trans European Networks (TEN) planning in Chinese projects.

In 2016, the EU engaged in a re-evaluation of its partnership with China[9]. This was based on a realistic assessment of China's rise and ambitions, with strong references to the need for reciprocity and a level playing field. As regards connectivity, a clear conditionality for co-operation under the BRI was expressed, making it dependent on "China fulfilling its declared aim of making it an open platform which adheres to market rules and international norms in order to deliver benefits for all."[10]

Almost simultaneously, High Representative for Foreign Affairs and Security Policy and Vice President of the EU Commission, Federica Mogherini presented a new Global Strategy for the EU's Foreign and Security Policy, which stated that **"there is a direct connection between European prosperity and Asian security", that "the EU will engage China based on respect for the rule of law, both domestically and internationally", and that "we will pursue a coherent approach to China's connectivity drives westwards by maximizing the potential of the EU-China Connectivity Platform, and the ASEM/ EU- ASEAN frameworks." [11]** This part was little noticed at the time, but signaled the intent of increased EU multilateral action, as well as the EU's ambition to formulate its own "coherent approach" on connectivity. In effect, this intent provided the political impetus for the EU and its Member States to seek agreement with all Asian partners on the first multilateral definition of connectivity, which was achieved at the ASEM Ministerial in November 2017.[12] The quasi-monopoly of the Chinese side to define the terms of connectivity by its actions was overcome.

In the years that followed, the EU further developed its own independent connectivity policy framework. In September 2018[13] the European Commission and the High Representative for Foreign and Security Policy put forward a Joint Communication on "Connecting Europe and Asia", stressing the importance of being at the same time sustainable, comprehensive, and rules based. EU connectivity policy should simultaneously integrate transport, energy, digital networks and the flow of people, goods, and services as well as capital that pass through the connected countries. Connectivity partnerships with Asian countries and organizations should create transport links, energy and digital networks as well as human connections by building on Trans-European Networks (TEN) and extending them to countries bordering Asia. They should promote sustainable finance by utilizing various financial tools, referring to the Asian Development Bank estimating annual financing needs in the region amounting to USD 1.3 trillion for infrastructure investment, provided that robust legal frameworks be in place.

For the first time, the EU established thus its own connectivity approach, recognizing the differences in approach and implementation with China, and insisting on the need for interoperability between systems and networks. It signaled willingness to continue finding synergies but became adamant about the need to apply global rules and standards, creating level playing field and opportunities for all.

At the same time, the global discussion was clearly shifting, and the Chinese rhetoric shifted with it – but without the Chinese government changing its practices. In 2018 China launched preparations for its "Green Silk Road", recognizing that many Western governments and civil society had criticized the BRI for its lack of environmental sustainability, and that many BRI partners countries were lagging in their SDG implementation. China released the Green Investment Principles (GIP) for the BRI during the same year and established the BRI International Green Development Coalition in 2019.[14] The multilateral battle for a sustainable approach culminated in June 2019 with the adoption of the six detailed Principles for Quality Infrastructure[15] by the G20 Summit in Osaka.

The EU, in turn, decided to cooperate closely on connectivity projects in third countries with key likeminded partners, such as Japan and India. On 27 September 2019, Commission President Juncker signed the EU-Japan Partnership on Sustainable Connectivity and Quality Infrastructure at the first EU-Asia Connectivity Forum in Brussels together with Japanese Prime Minister Shinzo Abe, benefitting from Japan's longstanding experience as a major investor across the world in infrastructure development.[16] An EU-India Connectivity Partnership followed at the May 2021 EU-India summit in Porto, which was agreed between Prime Minister Narendra Modi and Commission President Ursula von der Leyen.

Competing approaches between BRI and GG since 2021

A significant qualitative change occurred in December 2021, when President von der Leyen presented the EU's new Global Gateway initiative (GG), together with EU High Representative/Vice President Josep Borrell and Commissioner for International Partnerships Jutta Urpilainen. It explicitly builds on the 2018 EU-Asia Connectivity Strategy, as well as on the EU's Connectivity Partnerships with Japan and India. The GG enhances the 2018 approach in significant and operationally relevant ways. This qualitative change consists first and foremost in its global scope, and is characterized by seven criteria:

1. **It states plainly that democracies must be able to deliver on global challenges and make a positive offer,** with GG being an EU plan for major investment in infrastructure development around the world.

2. **It focuses on physical infrastructure to strengthen digital, transport and energy networks,** and to provide an enabling environment to ensure projects deliver.

3. **It adds health (post-COVID!), education and research** to the areas of action.

4. **It intends to mobilize investments of up to EUR 300 billion between 2021 and 2027,** with new possibilities for guarantees under the new European Fund for Sustainable Development + , with additional blending and grant assistance.

5. **It pursues a Team Europe approach** (EU, Member States, European financial institutions, national development financial institutions).

6. **It recognizes the importance of private sector inclusion** and mobilization for investments.

7. **It dovetails with likeminded partners' work,** now pursued under the G7 Partnership for Global Infrastructure Investment (PGII).

The implementation of the Global Gateway initiative follows six key principles:

KEY PRINCIPLES OF THE EU GLOBAL GATEWAY INITIATIVE

Democratic values and high standards
A value-based option for partners to choose from when deciding how to meet infrastructure development needs: Rule of Law, high standards of human rights, social and workers' rights, respecting international rules and standards; IPR. Sustainable investments with an ethical approach: no unsustainable debt or unwanted dependencies.

Good Governance and Transparency
Transparency; accountability; financial sustainability; open access to public procurement; level playing field for investors.

Equal partnerships
Needs and opportunities are identified with partner countries for their local economies/communities, taking into account capacity of host country to maintain infrastructure)

Green and clean
Climate resilience; on pathway towards net-zero emissions.

Security-focused
Resilience with regard to global economy/ supply chains.

Catalyzing private-sector investment
Combining and leveraging public resources and using these to crowd in private capital.

GLOBAL GATEWAY FINANCING VOLUME

EUR 300 billion for 2021–2027		
Up to EUR 135 billion by the European Fund for Sustainable Development Plus (EFSD+). → Includes EIB initiative that could bring EUR 25 billion in investments.	Grant financing up to EUR 18 billion under other EU external assistance programmes[18]	EUR 145 billion of planned investment volumes by European financial and development finance institutions (Team Europe)

Commission President von der Leyen gave a distinct answer to the repeated invitation by the Chinese side for the EU to create synergies with China's BRI at the Global Gateway Forum in October 2023 in Brussels, when she stated that

> […] Global Gateway lays out a new approach to big infrastructure projects. For us, it is important that Global Gateway is about giving choices to countries—better choices. Because for many countries around the world, investment options are not only limited, but they all come with a lot of small print, and sometimes with a very high price. Sometimes it is the environment that pays the price. Sometimes it is workers who are stripped of their rights. Sometimes foreign workers are brought in. And sometimes national sovereignty is compromised. No country should be faced with a situation in which the only option to finance its essential infrastructure is to sell its future. We, in Europe, have a clear strategic interest to join forces, at eyes' level, to overcome global challenges.[19]

Despite the implicit language, the message is very clear: The GG is meant to be an alternative to the BRI. **The EU/ Team Europe with Global Gateway is now in competition with China in the global race for infrastructure development and secure supply chains.**

This is notwithstanding continued bilateral co-operation of several EU Member States with China as regards national infrastructure investments under the BRI, provided these are compatible with the EU's FDI Regulation.[20] The most prominent recent case was the minority share investment of the Chinese shipping company COSCO into a Hamburg port container terminal.[21]

But what, then, is the EU's track record of implementation, in providing options to partners around the world?

The overall performance is difficult to gauge for a lack of precise information about this unique, new Team Europe approach, which was announced in 2021 and required a significant re-programming and project identification effort during the year 2022 to only become fully operational in 2023, some 10 years after the start of BRI of in 2013. Commission President von der Leyen shared at the October 2023 GG Forum in Brussels:

> Since we launched GG in 2021 the EU has already committed EUR 66 billion into transformative projects. Almost half of this are grants that do not have to be paid back. All from the EU budget. On top come Member States and private finance.

In the meantime, Member States and the European Investment Bank have worked together with the European Commission and Team Europe to launch about 87 flagship projects around the globe in 2023, and some 138 additional flagship projects during the year of 2024.

In addition, it should be noted that work with likeminded international partners has also improved since 2022:

- G7 leaders have formally launched the **Partnership for Global infrastructure and Investment (PGII)** at their summit in Germany in June 2022, when US President Biden announced US mobilization of 200 USD billion for the years 2022-2027. The G7 partners' common aim is to mobilize USD 600 billion by 2027 in global infrastructure investments.

- At the EU-India G20 summit in September 2023, a new **India-Middle East-Europe Economic Corridor (IMEEC)** was announced, which will benefit from support of the PGII, and thus also from the EU.[22]

- At the GG Forum in October 2023, concrete implementation progress became very visible for the first time. Most notably, **three MoUs with the Democratic Republic of Congo, Zambia and the Republic of Angola as well as with the African Development Bank and the Africa Finance Corporation** were among the many projects announced at that occasion. They are supposed to develop critical and strategic raw materials value chains and boost transport connectivity , connecting the DRC, Zambia and the Port of Lobito in Angola (the **"Lobito Corridor"**). The EU and the US are both supporting the development of the corridor.[23]

- There were also significant amounts agreed in support of the **G7 Just Energy Transition Partnerships (JETP) with Vietnam** (EIB loan of EUR 500 million) **and Indonesia** (EIB loan of EUR 500 million)), as well as for the **Bangladesh Renewable Energy Facility** (EIB loan of EUR 350 million).

- In January 2024, at the **EU-Central Asia Investors' Forum** in Brussels, four Memoranda of Understanding (MoU) were signed by the EIB. The total support by the EU and **likeminded partners to Central Asian partners amounts to EUR 10 billion**.

Global Gateway outlook: policy recommendations for the next Commission and Team Europe 2025-2029

When commenting about the Commission's first connectivity policy initiative, Jonas Parello-Plesner wrote in 2019:

> The success of the EU strategy will largely depend on adequate financing, private-sector interest and cooperation with like-minded partners – and the speed with which it can be implemented.[24]

This remains very valid, also when assessing the Global Gateway initiative of 2021.[25] **EU Global Gateway practitioners, Member States experts and business representatives converge that the ship is now finally on the right course, but that far more needs to be done to increase speed and impact of GG projects.** The key is to properly maintain the Global Gateway initiative as it has been designed, and not to invent something new – as happens often when a new Commission starts – but instead to step up implementation efforts during the next mandate 2025-2029 on the base of lessons learnt since 2021. The following recommendations are designed to help draw the right conclusions when addressing current deficits with regard to vision and steer, organization, Team Europe as well as partners and communication:

→ Provide a long-term and geo-economic steer at political level.

Global interconnectivity reflecting EU economic interests, including the need for de-risking through diversification and stable supply chains, needs to be pursued in synergy with EU foreign and security policy, trade policy and a great variety of sectoral policies (such as digital, energy, transport, climate, environment). This requires a political, horizontal steering capacity by a specially assigned Executive Vice President of the Commission, together with the High Representative for the Common Foreign and Security Policy / Vice President of the EC.

→ Establish a top management operational steering group.

The current lead management responsibility lies with the Development Policy Director General (DG INPTA). This should be complemented with a Deputy Secretary General of the European Commission (to improve coherence with sectoral policy services and boost private sector involvement) as well as with a Deputy Secretary General of the European External Action Service (EEAS) (to better cater for the political and security related dimensions), with the top management of the relevant Commission services associated.

→ Appoint a Vice President of the European Investment Bank (EIB) to join the top management operational steering group.

To bring in the main implementing financial institution at an early stage of decision-making would help steer and possibly speed-up implementation inside the EIB, as well as coordination between the EIB and the Commission.

→ Cater for the strategic planning needs.

In order to move away from the current bottom-up approach of project identification, strategic planning and corresponding programming needs to be developed well before the next Financial Perspectives and be based on the EU's economic interests, (notably: increased supply chain security) and focus on major network and corridor investments. This must be combined with partner countries' national and regional development plans and prepared systematically by a special inter-service GG Task Force at management level.

→ Make the current financial architecture fit for purpose.

The GG's financial setup needs to be reconsidered and rendered fit for purpose. It needs to be well embedded in the EU's next Multi-Annual Financial Framework, and the time between the identification of projects and their implementation needs to be significantly shortened to remain credible.

→ Enhance private sector mobilization.
Private investment is critical for the success of GG, since the necessary levels of investment can only be achieved together with European businesses. There is a significant lack of transparency for companies wishing to participate (tendering) or to submit their own investment projects. Business interest needs to be catered for, both for strategic orientations as well as for the submission or implementation of projects. A dedicated GG Business Service should be created, endowed with relevant business finance experience to improve synergies between the public and the private sides of Team Europe.

→ Increase the buy-in of Member States significantly, also in financial terms,
if the mobilization target of EUR 300 billion are to be reached by 2027. This requires more joint programming and more shared implementation responsibilities.

→ Have the EIB further develop its capacity to act externally as a European Development Bank.
The EIB should build on its own lending practice as well as its responsibility for implementing some 50% of the European Fund for Sustainable Development (EFSD+), which provides an umbrella for blended finance and guarantee operations in EU external action within the framework of the NDCI-Global Europe Instrument.[26]

→ Step up co-operation with multilateral development banks to achieve economies of scale.
Tested examp-les are the African Development Bank in the case of the "Lobito Corridor" and the Asian Development Bank in the case of the ASEAN Catalytic Green Growth Facility. Any extension of co-operation should include also the *Asian Infrastructure Investment Bank* and the *World Bank*, while ensuring EU visibility.

→ Seek close cooperation with like-minded partners to achieve the critical mass for effectiveness.
The bases have been created through connectivity partnerships with Japan and India, as well as the G7 Partnership for Global Infrastructure Investment. This co-operation needs to be intensified. In particular, the significant infrastructure investment results achieved by Japan in developing countries should lead to a much closer operational partnership with Japan.

→ Refrain from using the brand "Global Gateway" indiscriminately.
It is inflationary when all types of development aid projects are now subsumed under GG, (possibly in order to reach the global mobilization figure of EUR 300 billion by 2027). The opposite effect is happening, with a loss of credibility on behalf of the GG initiative.

→ Only use the label "flagship project" when it is warranted due to the project's pilot function, size or overall economic or strategic importance.
Currently, there is a rather indiscriminate use of the term "flagship project", linked to the maturity of projects for public communication purposes. This should be discontinued, and 2023 and 2024 flagship project lists should be made public as an immediate measure to increase transparency.

→ Significantly strengthen public communication about the GG.
To date, public communication does not sufficiently provide essential information about the project, such as financial volume, implementation period, implementing partners, or progress in implementation. Existing information maps do not reveal much more than the beneficiary and the overall project volume. The current focus on announcements results in a lack of communication impact, both in partner countries and in the EU. This must be addressed fast to provide factual and real-life stories about projects. It also reflects the fact that too many projects continue to be sub-contracted, limiting the EU's public and political impact.

The EU is on the right path towards competing effectively with China's BRI, but it is still at the beginning of this path. Some of the EU's implementation difficulties with the Global Gateway are linked to the simple fact that there are many beneficiary countries which do not have an interest in fulfilling basic EU criteria under the Global Gateway, especially those linked to transparency and democratic standards. Faster delivery of BRI loans with less good governance criteria will continue to appear to many as more attractive. The EU has also had to re-acquire the capacity to mobilize investments into infrastructure development. This had originally been at the heart of EU development aid to LDCs in the 1960s-1980s, but had subsequently been largely abandoned in favor of sectoral policy support, with policy dialogue and direct budget support as the main approach. The EU, together with likeminded partners, intends to offer alternative choices. But if the EU really wants to win over partners across the globe for a values- and market-based approach, then it needs to step-up significantly its implementing capacity as Team Europe and unleash the European business potential for investments. **A quality leap in strategic planning and project selection, as well as an improved implementing capability in much closer operational coordination with member states and financial intermediaries will be necessary** for this to happen. Probably the Indian author Girish Luthra was right when he recently wrote that

> […] the BRI faces resistance and pushback from some countries but is likely to sustain its efforts to expand and develop a positive image. The GG has made a good beginning but is yet to establish itself. It adopts a new approach that gives choices to other countries. Similar alternatives may be offered by other countries. All the initiatives are likely to co-exist for some time, and choices largely made by partners will shape the global environment in the coming decade.[27]

The EU needs now to ensure that it does not only have the ambition, but also the capability to offer partners real choices, and in good time. But it is well capable of doing so, if sufficient priority is given to making the GG the well-crafted tool it aims to be.

1 Chinese Ministry of Foreign Affairs, accessed 12 December, 2023. https://www.fmprc.gov.cn/eng/.

2 Cf. The Global Infrastructure Hub – Infrastructure Outlook, accessed 31 May, 2024. https://outlook.gihub.org/.

3 Rozenberg, Julie, and Mary Faye, "Beyond the Gap: How Countries Can Afford the Infrastructure They Need while Protecting the Planet," *The World Bank Report* 2019. https://documents.worldbank.org/en/publication/documents-reports/documentdetail/189471550755819133/beyond-the-gap-how-countries-can-afford-the-infrastructure-they-need-while-protecting-the-planet.

4 Khanna, Parag, *Connectography: Mapping the Global Network Revolution*, London: Orion (2016), 11.

5 On Chinese thinking on the BRI, see: Wang, Yiwei: *An Interconnected World: China and the Belt and Road Initiative*, Beijing: China international Publishing Group/Foreign Language Group (2019).

6 Chinese investments executed or planned under the BRI are of great relevance for China–EU trade, notably with Mediterranean, but also increasingly with North Sea ports. There have also been other large Chinese infrastructure investments in several EU member states, with the takeover of the Portuguese electricity transmission system operator (TSO) Energias de Portugal (EDP) in 2011 being the most prominent. Cf. Smit Jacobs, Karin, "Chinese Strategic Interests in European Ports," *European Parliament Research Service Briefing*, published February 2023; Pèlegrin, Clémence, and Hugo Marciot, "China's at the Gate of the European Power Grid: China's Conquest of the European Power Sector," published September 2021. https://geopolitique.eu/en/articles/chinas-at-the-gate-of-the-european-power-grid/. Together with the Budapest-Belgrade railway, a BRI project that was highlighted during President Xi Jinping's visit to Hungary in May 2024 (see "The Budapest-Belgrade Railway is Testament to the Mutually Beneficial Cooperation," *China Today*, 10 May, 2024. http://www.chinatoday.com.cn/ctenglish/2018/commentaries/202405/t20240510_800365229.html).

7 See section "BRI Key Findings 2023" in: Nedophil, Christopher: China Belt and Road Initative (BRI) Investment Report 2023s, published by Griffith Asia Institute, Griffith University, Brisbane Australia and Green Finance and Development Center, FISF Fudan University (Shanghai). DOI:10.25904/1912/5140.

8 A detailed overview is given in European Chamber of Commerce in China, "The Road Less Travelled: European Involvement in *China's Belt and Road Initiative*," published 2020. https://www.europeanchamber.com.cn/en/publications-archive/762/The_Road_Less_Travelled_European_Involvement_in_China_s_Belt_and_Road_Initiative. This report offers very concrete criticism regarding the difficulties to a) know about and b) obtain any contract for the implementation of BRI projects either in China or abroad. The survey reports that only 12 (!) EU companies won some projects and very few won about 50 projects, always in a 'filling a gap/niche mode". The report also contains criticism regarding the fact that the 2018 Joint Communication on Connectivity had not been effectively followed up with a proper roll-out of EU projects, *to compete with BRI*.

9 "Elements for a New EU Strategy on China," European Commission/High Representative Joint Communication, published 22 June, 2016. https://www.eeas.europa.eu/sites/default/files/joint_communication_to_the_european_parliament_and_the_council_-_elements_for_a_new_eu_strategy_on_china.pdf

10 *Ibid.*, 10.

11 European External Action Service Publications Office, *Shared Vision, Common Action: A Stronger Europe. – A Global Strategy for the European Union's Foreign and Security Policy*, published 2016. https://data.europa.eu/doi/10.2871/9875.

12 The 13th Asia-Europe Foreign Ministers' Meeting (ASEM), held 20-21 November 2017 in Nay Pyi Taw, Myanmar, endorsed *a definition of ASEM connectivity*. The Chinese dominance in defining connectivity *via the BRI was over.* ASEM adopted a *comprehensive definition of connectivity, which referred clearly to the need to respect international norms*, to ensure social and environmental sustainability, to guarantee economic viability and ensure financial sustainability, while using international standards and be open to all for implementation.

13 "Connecting Europe and Asia: Building Blocks for an EU Strategy," European Commission/High Representative Joint Communication, published 19 September, 2018. https://www.eeas.europa.eu/sites/default/files/joint_communication_-_connecting_europe_and_asia_-_building_blocks_for_an_eu_strategy_2018-09-19.pdf.

14 "Green Silk Road Drives Sustainable Development in BRI Landscape," *China Daily*, 15 May 2023. https://www.chinadaily.com.cn/a/202305/15/WS646187eba310b6054fad2ec7.html.

15 These being non-binding principles, as the Chinese side keeps emphasizing.

16 See Okano-Heijmans, Maaike, "Empowering the EU-Japan Connectivity Partnership," *Clingendael Magazine*, 4 November 2019. https://www.clingendael.org/publication/empowering-eu-japan-connectivity-partnership.

17 The EFSD+ is an innovative instrument that helps to generate investments in a variety of GG sectors through its guarantee capacity and blending grants. It makes EUR 40 billion available in guarantee capacity. The guarantees allow investors to finance projects in more challenging markets. This, in turn, attracts EU's development finance partners to come in with matching guarantees.

18 Most of the grant financing stems from the Neighborhood, Development and International Cooperation Instrument. For reference: the NDICI–Global Europe total budget is EUR 79 billion in grant financing for the period 2021–2027.

19 *Opening Speech by the President: Global Gateway Forum*, Brussels, 25 October 2023, 1. https://ec.europa.eu/commission/presscorner/detail/en/speech_23_5305.

20 The EU Foreign Direct Investment Regulation 's objective is to ensure that the EU is better equipped to identify, assess and mitigate potential risks to security or public order, while remaining open to foreign investment. It has been applied since 11 October 2020 (EU-Regulation 2019/452). In January 2014, the EU Commission had proposed a further strengthening by improved screening of FDI into the EU, as part of its legislative package proposal on Economic Security.

21 "COSCO's Investment in Hamburg Terminal Finalized," *The Maritime Executive*, 19 June 2023. https://maritime-executive.com/article/cosco-s-investment-in-hamburg-terminal-finalized.

22 Ahead of the 2024 G7 summit in Italy, Kaush Arha und Carlos Roa assess IMEC's potential economic development contribution and geo-economic importance positively, despite the massive negative impact of the Israel-Hamas war and the Houthi attacks in the Red Sea. Arha, Kaush, and CArlos Roa, "IMEC's Road Ahead," *The National Interest*, 3 May 2024. https://nationalinterest.org/feature/imec%E2%80%99s-road-ahead-210890 .

23 European Commission, *Joint Statement from the European Union and the United States*, New Delhi, 9 September, 2023. https://ec.europa.eu/commission/presscorner/api/files/document/print/en/statement_23_4419/STATEMENT_23_4419_EN.pdf; European Commission, "Global Gateway: EU Signs Strategic Partnerships on Critical Raw Materials Value Chains with DRC and Zambia and Advances Cooperation with US and Other Key Partners to Develop the 'Lobito Corridor'," Press Release, 26 October, 2023. https://ec.europa.eu/commission/presscorner/detail/eN/ip_23_5303.

24 Parello-Plesner, Jonas: "A Health Check to Reset the EU's China Policy," *Policy Brief* published by The German Marshall Fund of the United States, 18 March, 2019. https://www.gmfus.org/news/health-check-reset-eus-china-policy.

25 For an assessment of the GG, see Teeavan, Chloe, San Bilal, Ennatu Domingo, and Alfonso Medinilla, "The Global Gateway: A Recipe for EU Geopolitical Relevance?," in: *ECDPM Discussion Paper* 323 (June 2022), 15; Vlahutin, Romana: "Can the Global South Win from China's Loss?," *Euractiv*, 28 November, 2023. https://www.euractiv.com/section/global-europe/opinion/can-the-global-south-win-from-chinas-loss/; Meehan Rémi, and Earl Wang, "Euroviews: The EU's Global Gateway Strategy's Alleged Weaknesses Are Actually Its Strenghts," Euronews, 10 January, 2024. https://www.euronews.com/my-europe/2024/01/10/the-eus-global-gateway-strategys-alleged-weaknesses-are-actually-its-strengths.

26 See the detailed study: Lundsgaarde, Erik, María-Luisa Sánchez Barrueco, and Andreea Hancu Budui, *The New EFSD+ and the EIB's External Lending Mandate*, published by Policy Department for Budgetary Affairs, European Parliament, February 2022, 98. https://www.europarl.europa.eu/RegData/etudes/STUD/2022/729264/IPOL_STU(2022)729264_EN.pdf.

27 Luthra, Girish, "The GG and BRI Forums: Few Similarities, Striking Differences," published by Observer Research Foundation, 14 November, 2023. https://www.orfonline.org/expert-speak/the-global-gateway-and-bri-forums-few-similarities-striking-differences.

2. The EU Global Gateway Initiative's Relevance for Sustainable Growth and Economic Resilience in Africa

Jean Cedric Kouam, Robert Nantchouang, and Denis A. Foretia

Aiming to support the development of infrastructure projects worldwide, the European Commission established the Global Gateway Initiative (GG) in 2021. By 2027, investment of approximately EUR 300 billion, most from already approved projects, is expected to be deployed through the programme, which focuses on digital technologies, energy, and ecological transitions. The GG was borne out of the Economic Partnership Agreement between the European Union and the African, Caribbean, and Pacific (ACP) countries that went into effect in 2003. In this chapter, we focus on the relevance of the GG through an African lens.

On paper, the GG has good intentions for the world's poorest continent.[1] It seeks to support the financing of sustainable, high-quality infrastructure that meets social and environmental standards with an estimated EUR 150 billion. Given Africa's enormous development needs, the initiative is an opportunity to strengthen the competitiveness and security of Africa's supply chains, improve health systems while addressing climate change. Though some have tried to frame the GG as Europe's response to China's Belt and Road Initiative (BRI), some important differences remain. We argue that instead of seeing the GG and BRI as competitors, they should be understood as compliments. While the GG may improve Europe's standing in the eyes of African nations, concerns whether the GG is successfully "combating" the BRI on the ground are misleading. Instead, a good way for Europe to improve its image on the continent is to ensure that many successful development projects are financed by the GG, which will improve African lives. This, combined with wise framing decisions, can improve whatever ground Europe may have lost to China over the past two decades. When this happens, Europe will be seen as contributing to Africa's growth rather than the prevailing view of Europe, as it is held by large parts of the population on the continent, as a continent that perpetually milks Africa. Therefore, this chapter examines the prospects of the EU's GG from an African perspective. It highlights the potential contributions of the GG for Africa's economic transformation and presents key recommendations to European policymakers.

The Global Gateway's potential for impact

In Africa, the needs in the areas covered by the GG (digital, energy, transport, health, education, and research sectors) are enormous, which means that any contribution from the programme will contribute to make progress in structurally transforming the continent.[2] Nevertheless, GG commitments are currently too small to fully address any single large-scale issue that the continent is facing. That does not mean that the GG can't have an impact on African development. There are several ways in which wisely structured GG funds can make a positive impact on African lives. Below we touch on many of the sectors that GG funds have been earmarked, highlighting the current state of how that sector is operating, and some successful case studies of GG-financed projects that show how funds can be used to bring about positive outcomes. We also provide principles that policymakers would be wise to consider in each sector. Table 1 shows current GG flagships projects for 2023/2024.

Table 1 | Global Gateway Flagship Projects for 2023/2024 [3]

AREA	PROJECT	COUNTRY
Climate and energy	Coastal Protection	Togo and Mozambique
	Construction and development of the Kigali Wholesale Market	Rwanda
	Construction of the Nachtigal hydroelectric dam (400 MW)	Cameroon
	Eastern Backbone Power Transmission	Malawi
	Electricity in Rural Areas	Madagascar
	Enhance and secure renewable electricity generation	DRC

	Geothermal Project TMGO	Ethiopia
	Green hydrogen	Namibia
	High voltage transmission line (backbone)	Côte d'Ivoire
	Inclusive Green Growth	Namibia
	Irrigation infrastructure	Somalia
	Irrigation programme PARIIS and rural development programme PADAER II	Senegal
	Jigawa Solar photovoltaic project	Nigeria
	Just Energy Transition Partnership	Senegal
	KOLWEZI – SOLWEZI interconnector	Zambia & DRC
	Modernisation of the industrial tool and energetic transition of Sodecoton	Cameroon
	Modernisation of two hydropower plants	Mozambique
	Olkaria I & IV Uprating project	Kenya
	Preservation of terrestrial and marine landscapes	Madagascar
	Rehabilitation and expansion of drinking water infrastructure	Democratic Republic of Congo
	Rehabilitation of Nalubaale-Kiira Hydropower Plant (380MW)	Uganda
	Solar Park for Rural Electrification	Angola
	Solar power plant Kaleo	Ghana
	Strategic Partnership on Critical Raw Materials	DRC
	Transfer of innovative Polish biogas technology to the agricultural sector	Kenya
	WASUNA project	Côte d'Ivoire
Digital	Construction of fibre-optic cables	DRC, Zambia, Zimbabwe, Malawi and Mozambique
	EU-Nigeria Digital Economy Package	Nigeria
	Human-Centred Digitalisation Initiative	Kenya
	Implementation of Time Synchronization System	South Africa
	Investing in mobile networks	Madagascar and Tanzania
	Rehabilitation and modernisation of the national transmission grid	Ethiopia

Education and research	Building WASH facilities in schools	Uganda
	e-Youth	Mozambique
	Early childhood development	Zambia
	Gender Transformative Action	Tanzania
	Improving the Technical and Vocational Education system	Madagascar
	Rehabilitation and equipment of Technical and Vocational Education and Training (TVET) institutions in Benue, Plateau and Oyo States	Nigeria
	Renovation and construction of professional and technical schools	Benin
	Technical and Vocational Education and Training (TVET) infrastructure and modernisation of agricultural vocational training	Angola
Health	Digital Health for Health Systems Strengthening and Universal Health Coverage (UHC)	Sub-Saharan Africa
	MAV/ local production of vaccines and medicines	Nigeria
	Part of MAV: Manufacturing and Access to Vaccines, medicines & health technology products in Africa	Rwanda
	Salama - Support for central drug purchasing	Madagascar
	Treatment plant for wastewater in the west of Cotonou	Benin
Transport	Casamance project: upgrade and operation of the port of Ziguinchor	Senegal
	Djibouti second airport development project	Djibouti
	Green and Digital logistics Corridor	Angola
	Lagos Inland Water Transport	Nigeria
	Lobito Corridor	Zambia, Angola, DRC
	Mindelo port expansion	Cabo Verde
	Modernisation of the N'Djamena-Douala corridor and construction of a bridge	Chad
	N'Djamena Airport	Chad
	Port of Pointe-Noire Infrastructure	Republic of Congo
	Rehabilitation feeder and farm roads	Ghana
	Rehabilitation of road EN140 between Mussende and Cangandala	Angola
	Strategic Transport Corridor	Libreville-Kibi/Douala N'Djamena
	Zambia – Tanzania – Kenya (ZTK) Interconnector	Zambia, Tanzania

Improving Africa's energy sector

To understand how GG financing can be used to support Africa's energy sector, one must first understand what the current state of the energy sector is. As of 2022, approximately 43% of the continent's population lacked access to electricity – a whopping 600 million people, with rural areas tending to have less access than urban areas.[4] In addition, almost 1 billion Africans lacked access to clean cooking fuels, a significant hurdle that shortens African lives and forces many women to spend time gathering fuel for cooking instead of pursuing education, employment, or other activities. Finally, a snapshot of Africa's energy situation can be seen by looking at energy production and consumption relative to their population size. With 13 percent of the world's population, the continent produces 7 percent of the world's commercial energy, but only consumes 3 percent.[5] This, unfortunately, is likely partially attributable to the fact that **the continent lacks the necessary infrastructure to ensure adequate energy consumption by the population.** Such low rates of energy consumption represent a major constraint on the effective implementation of major development projects, as every project requires significant energy capabilities.

The GG can be used to improve some of these pressing energy challenges. Take, for example, the Just Energy Transition Partnership (JETP) located in Senegal. The JETP was launched in June of 2023 to "support Senegal's efforts to achieve universal access to energy and consolidate a low-carbon, resilient and sustainable energy system." Over a period of 3 to 5 years, the JETP is intended to mobilize EUR 2.5 billion in financing which will be disbursed via loans and grants to various projects with the intended goal of ensuring that 40 percent of Senegal's electricity mix is in renewable energy.[7]

A positive factor of the JETP is that funds can be used in a myriad of ways, allowing for local knowledge to guide the implementation process. JETP funds can be used for:

> […] equipment manufacturing, strengthening, stabilizing and modernizing the electricity grid throughout the country and continuing interconnections with other countries in the region, strengthening electricity storage capacities, improving energy efficiency and developing capacities to prepare for the production of green energy.[8]

While there may be a worry that having such a wide range of activities that these funds can be used for might lead to wastefulness, flexible deals such as this can also capitalize on local knowledge to ensure that funds are being used in efficient and effective manners. For this to be the case though, adequate oversight and grant/loan applications must be scrutinized by a variety of groups, including in-country experts who deeply understand the needs of the Senegalese energy sector. In addition, monitoring of the JETP is somewhat straightforward. Statistics on electricity access are available and it is simple to track where JETP funds go and how they may or may not be having their intended result: improving energy access. Projects like this, are great examples of how GG funding could make a tangible difference.

Fostering gender-balanced access to the labour market

In education and research, many African countries are on track to achieve the goal of education for all, but major disparities remain particularly in girls' and women's access to quality education and training. By investing in quality education with particular attention to the inclusion of vulnerable groups, the GG can contribute to overcoming many of the barriers girls and women face in accessing and completing education, especially in STEM (Science, Technology, Engineering, and Mathematics) fields. One such GG-funded project where this has occurred has been the construction of WASH (water, sanitation, and hygiene) facilities for adolescent women in Uganda.[9] This project was included in the list of 2024 GG flagship projects.

Access to clean water and sanitation is one of the most basic necessities for humans to have a flourishing life. Unfortunately, statistics on access to water vary widely, but there is no doubt that many Ugandans are greatly limited because of a lack of access to clean drinking water and other important hygiene products.[10] By providing women with WASH-related products and facilities, they can pursue activities that they were not previously able to enjoy.

Projects such as these can have impactful results for women in the localities where they are operating. GG-funded projects that encourage skill accumulation for women can potentially have long-lasting effects on development by first, allowing women to work and earn incomes that were not previously available to them, and second, by supporting women to pursue educational opportunities that they have been historically excluded from. When considering projects that impact women's access to education and the labor market, it would be wise to engage with in-country experts who understand how women generally engage with the labor market in the particular society, what types of skills they need to have to earn a decent living, and what the goals and desires of women in those particular areas are.

Making climate change less impactful

Promoting economic development on the continent while mitigating the effects of climate change remains a major preoccupation for African policymakers. The 2013 Key World Energy Statistics report estimates that fossil fuels account for more than 80% of global primary energy production. With regards to global pollution, Africa is responsible for less than 5%, but the impacts of climate change are most pronounced on the continent. Current financial commitments to tackle climate change amounts to only USD 792 million for all developing countries, representing less than 0.2% of the resources needed. Affordable and reliable energy sources are, however, necessary for economic development.

While the continent is responsible for a small percentage of global carbon emissions, it has been seen as the most vulnerable in the world when it comes to climate-related disasters, partly due to the poor economic state of many African economies.[11] Unfortunately, the amount of funding needed to totally tackle climate change is far too large for the GG to address, with some reports finding that trillions of dollars are needed annually to adequately address the impacts of climate disruptions.[12] The GG cannot possibly be expected to move the needle all that much when it comes to the total financing needed for addressing climate change, but that does not mean that there are not important projects that could be funded to help mitigate the effects of climate change.

A GG project of note is the Zambia Forest Partnership, which aims at improving governance and management systems in forest policy, boosting job creation through improving the value chain of forest products and services, improving environmental sustainability, and developing human and social capital to equip local workers.[13] GG projects that focus on environmental sustainability have also been signed with Uganda[14] and the Republic of Congo.[15] Protecting forests from pollution and excessive deforestation is important to slowing climate change, helping to ensure that air in a surrounding area is clean, and avoiding soil erosion.[16]

Caution is needed though when discussing climate-related GG projects. While a laudable goal of the GG is to help African countries experience green industrialization, the reality is that affordable, reliable, and low-emission energy sources are expensive. The elimination of fossil fuels as a primary source of energy for most African countries is unfeasible in the near or medium term. Finally, there is good reason to strongly discourage Europe from attempting to stop countries in the Global South from using cheap energy sources that Europe itself used to develop. As former Nigerian president Olusegun Obasanjo once remarked:

> No other continent in history has been tasked with the challenge of developing without polluting, whilst being simultaneously the major victim and lowest contributor to emissions.[17]

Therefore, Europe should recognize that the likelihood of Africa industrializing totally through green technology is very low and that calls to reduce fossil fuel usage in the region is being met with practical resistance by African policymakers. **While energy should remain a major focus of the GG, the initiative should look at optimizing the composition of the energy mix between fossil fuels and renewables, which should always be guided by a country's economic and development needs.**

Connectivity and digitalisation

Another area where the GG looks to make an impact is digital innovation. Africa has faced enormous challenges in advancing technological and digital development, which is partly due to many of the other underdeveloped sectors across the continent. The World Bank notes that while an average of 84 percent of people in sub-Saharan Africa live in areas with available 3G services and 54 percent have 4G mobile internet service, only 22 percent were using mobile internet services at the end of 2021.[18] This could be for a number of reasons, including lacking ownership of a mobile device or individuals being unable to purchase a coverage plan even though they live in areas where mobile internet services are provided. Usage rates today vary widely in African countries, from 6 percent to 53 percent, highlighting the heterogeneity of average usage and the need for differentiated policy reforms across countries. Crafting the correct GG-financed programme when it comes to Connectivity and Digitalisation will be highly specific to the country involved. For example, a GG-financed project in a fairly well-developed African country, like South Africa, may focus on improving the already existing electrical grid which the country has in place. However, a country like South Sudan, which has a very weak electrical grid, may focus on expanding access to remote areas of the country which have never received power before. Prior to any GG-financed project, there needs to be adequate investigation into the needs of any specific country, and what exactly the best way to improve connectivity and digitalisation is.

The GG has already several initiatives in place that are working to expand digital infrastructure across Africa. One project is the Africa-Europe Digital Innovation Bridge, which aims to support intercontinental cooperation between African and European stakeholders with the goal of establishing a single market for digital innovation across continents.[19] To accomplish this goal, the project focuses on several areas, including (1) supporting localities to develop policy frameworks that spur innovation, building capacity for marginalized groups, training individuals on how to start digital businesses through a skills academy, creating online marketplaces and hubs for investors, and spurring trans-continental partnerships for start-ups, small and medium enterprises (SMEs) so that African diasporas, in Europe and across the world, can more easily collaborate with communities in their home countries.[20] By providing trainings for entrepreneurs and working with policymakers and stakeholder groups, this project is equipping individuals with the skills they need to be successful in the private sector, which can have significant long-term ramifications for the African continent.

Further GG funding that can help people get online and get acquainted with the opportunities that they may be able to enjoy via the digital economy can certainly be helpful. Projects that harmonize regulatory environments (such as data-related regulatory procedures, public procurement policies, and content access policies) across African countries can make it easier for businesses to expand and operate across national boundaries. Finally, figuring out ways to expand talent development and equip individuals to take advantage of opportunities in the digital economy should be a priority of the GG. Working with the private sector can be a great way to figure out what types of skills are needed in the marketplace and ensuring that those who succeed in going through training activities have access to job opportunities after.[21]

Improving industrial development

The importance of the GG also lies in its potential contribution to Africa's industrial development, which is a critical component in creating decent jobs and alleviating poverty. Very few, if any, countries have been able to enjoy long-term growth without at some point having a thriving manufacturing sector that spurs the structural transformation of the economy.[22]

Unfortunately, while GG funds certainly impact areas that are related to manufacturing, it does not seem as if the GG has spurring industrial capacity as a main goal. Going forward, it would be wise to consider creative ways that GG funds can be used to strengthen Africa's manufacturing base. One interesting way in which GG funding could potentially be utilized is by supporting "Special Economic Zones", or SEZs, which are geographically delimited areas within a particular country that are used to spur industrial development.[23] By providing companies with incentives to invest in the SEZ (tax breaks, duty-free imports on intermediate goods, etc…) many countries have used SEZs to create regional hubs that spur industrial growth and have positive spillover effects to the surrounding population in areas like job growth and skills transfer. Ethiopia has **experienced some success** when it comes to using SEZs to spur growth **(although Ethiopian SEZs do face challenges)**, and there is no reason why GG funds can't be used to do the very same thing in other African contexts.[24]

It is often expensive to set up SEZs given the fact that they are often located on undeveloped plots of land. GG funds that can provide electricity, clean water, and security would be a great start. Nevertheless, there is a large literature on what is required for the effectiveness of SEZs, **such as the institutional quality of the surrounding area, or the ability of SEZs to attract semi-skilled labor at a relatively low cost.** If policymakers are to use GG funds to finance such projects, understanding the country and community context, institutional environment, type of SEZ, and anticipated products are all important considerations.[25]

The EU's GG vs. China's BRI

While the GG can contribute to meeting Africa's development needs, the programme is inadequate to address the shortfalls the continent is currently experiencing. With what many African governments consider as more favorable lending terms, many countries have sought and obtained various forms of financing from China. This has caused concern in Western development circles, given the authoritarian nature of the Chinese Communist Party (CCP).[26]

A further worry is that due to the massive amount of Chinese financing that has flowed into Africa over the past two decades, Western powers may be losing influence on the continent. There evidence on this is ambivalent at best. A public opinion survey that looked at the views of citizens towards China in 25 countries found that some of the highest positive perceptions of China are found in African countries.[27] Afrobarometer found that, across 16 African countries, preference for the China model increased from 22% to 23% from 2014 to 2020. During this time, preference for the United States model changed from 33% to 31%.

Nevertheless, a paper that came out in 2019 may give the European Union reason to not be so worried about China's growing presence in terms of it overtaking Europe as an appreciated/recognized partner on the continent. The paper surveyed 1,000 respondents that were made up of academics, journalists, think tank workers, researchers, non-governmental organization and regional economic body staffers, and government agency employees. It showed that while China was perceived as more effective than Europe in some areas, it was not perceived as more effective in all areas. When asked about the EU's and China's effectiveness in a variety of areas, the EU scored better than China when it came to supporting private sector growth, debt diplomacy, soft power-related activities, gender and human rights, and transparency. Conversely, China scored better when it came to quick-decision making and the timely-completion of projects.[28]

Does this prove that the EU is losing ground in Africa? Probably in some areas. According to the above report, China is perceived as being a better partner when it comes to completing projects and having less red tape. But, Europe certainly is not perceived as "behind China" everywhere. This debate of EU vs China is not important to a majority of Africans. Europe, instead of getting caught up in a debate about whether China has usurped the EU in African minds, would do much better to focus on bolstering the areas where Chinese projects are perceived to be succeeding at a higher rate than European ones: quick-decision making and a timely completion of projects. GG funds can certainly be used to do this. In addition, there is another reason to be skeptical of the claim that China were kicking the West out of Africa: the same public opinion survey referenced above, which showed high levels of support for Chinese projects amongst Africans, also found high levels of support for the United States (which is, in the way it implements projects, quite different from the EU, but still largely perceived as 'Western'). When asked which country respondents would prefer to be the global superpower, 77% of Nigerians, 80% of Kenyans, and 59% of South Africans chose the United States.[29] Hence, it does not seem like Africans are 'blindly' running towards the Chinese development model and 'abandoning the West'.

Finally, it should be noted that the Chinese BRI is very different from the EU's GG. First, the scale of the BRI is much larger than the GG. Estimates of exactly how much money has been spent by China in Africa vary widely, but according to the Chinese Loans to Africa Database, housed at the Boston University Global Development Policy Center, between 2000 and 2020 Chinese financiers penned 1,188 loan commitments worth USD 160 billion with African governments and state-owned enterprises.[30] The EU's GG is not too far off from this, committing to send EUR 150 billion in investment to Africa between 2021 and 2027. Nevertheless, China has continued to invest in Africa, and it will likely continue to do so through 2027.[31] Second, the types of projects funded by the BRI and GG are different. Chinese funds are highly concentrated in infrastructure sectors such as transportation, power generation, mining, and telecommunication while GG funds are intended to accelerate the green transition, the digital transition, strengthen health systems and bolster education.[32] This is an important difference especially because the GG is a new initiative that is yet to prove its worth compared to decades of experience with Chinese-funded BRI projects. Third, China pursues a foreign policy that – officially – does not interfere with the domestic policies of African governments. In 2018, at the 7th Forum on China-Africa Cooperation (FOCAC), President Xi Jinping noted that Chinese funds to Africa would not come with "any political conditions attached".[33] This is different from the GG, which officially states that one of the six core principles that guide the investments of the GG is "democratic values and high standards" and "good governance and transparency."[34] The devastating effects of the Washington Consensus and its structural adjustment programs to African economies have made African policymakers to be generally hesitant towards Western-led initiatives, and more receptive to the promise of political non-involvement.

While the GG mirrors the BRI in some ways, it is different in many ways, and this should not be seen as a problem. The important takeaway for EU policymakers to remember is the necessity of ensuring that these funds are accomplishing their goal: changing and transforming the lives of Africans so that they enjoy the benefits of development that help individuals gain access to freedoms they did not previously enjoy. In the following section we provide important considerations that EU policymakers should keep in mind when thinking about how to ensure that GG funds are used to improve African lives and African perceptions of the EU.

Table 2 | China's BRI and EU's GG Comparison

	CHINA'S BELT AND ROAD INITIATIVE (BRI)	EU GLOBAL GATEWAY INITIATIVE
Focus	• Large-scale physical infrastructure projects • Concentrated in transportation, mining, energy (fossil fuels), telecommunication • Began funding in early 2000s, ramped up in 2013 with BRI	• Sustainable investments in infrastructure (digital, energy, transport), health, education and skills, as well as climate change and environment. • Transparency • Adherence to high environmental and social standards
Investment Approach	• Loans for funding	• Grants, soft loans and guarantees designed to attract private-sector investment
Values and Standards	• Human rights, social values, and intellectual property norms are not given priority.	• Strive to respect human rights, the rule of law and international standards.

Recommendations for EU policymakers

The GG presents opportunities for Europe to positively engage with the African continent. Encouragingly, there is support for the GG from prominent African institutions. At the 2024 Italy-Africa Summit, where a new Financial Framework Partnership Agreement was signed between the EU and the African Development Bank Group (ADB), the President of the ADB, Dr. Akinwumi Adesina, noted that

> The signing of this important Financial Framework Partnership Agreement marks the positive evolution of the relationship between African and the European Union. It will enable the ADB and European Commission to leverage on their respective resources to significantly support transformative investments in African countries and build resilient and sustainable economies.[35]

Furthermore, Nigeria's president Bola Tinubu reportedly called for a stronger partnership between the EU and Nigeria where democracy, rule of law, and freedom are supported. Nigerian Minister of Budget and Economic Planning, Senator Abubakar Atiku Bagudu, at a 2023 EU-Nigeria Strategic Meeting where several GG-financed deals were signed, was quoted as saying "Today marks yet another milestone in the annals of the EU-Nigeria development cooperation."[36] Clearly there is support for GG amongst leading African policymakers, but to succeed, EU policymakers must consider the geopolitical positioning of the continent and its perspectives.

→ Africans do not view the world through a Chinese prism, but an African one.

While countering China in Africa may be a goal of the GG, the constant talk about China's role in Africa, and how Europe can counter it, leaves many Africans with the distinct feeling that the continent is being used as a pawn in a global chess game of geopolitical influence. Framing issues in this way assumes that African governments are being taken advantage of by Chinese lenders, and it also implies that African countries lack the agency to engage with the Chinese. Europeans seem to be assuming they need to save Africa from China. This framing does not account for Africa's agency in its own decisions. It would be better for the European Union to not assume that African leaders make decisions through a Chinese prism.

African leaders have a very clear-eyed view of the geopolitical and strategic interests of China, the EU and the United States. In fact, in 2021 an Afrobarometer article noted that in 10 of 16 countries surveyed, views towards China were moving in a negative direction.[37] That same article noted that it is likely that Africans view the co-existence of Chinese financing and Western financing as a win-win situation, indicating that the EU does not need to view Chinese funds as outcompeting their relations with African states.

Is it any surprise that African leaders accept funding agreements with the Chinese that they believe can help transform their countries? Not really. EU policymakers should accept that and simply focus on the actual quality of the projects being funded, as well the quality and durability of the relationships they are building with their African partners for their own sake. Making China the public centre of focus sends the wrong signals to African counterparts and scatters attention away from the potentially life-transforming work of GG projects.

→ Europe should seek to partner up with Africa rather than compete with China.

African governments, for the most part, believe in the rules-based global order. However, they are cognizant of global inequities with the system–whether dealing with the global financing architecture, the power dynamics within the United Nations Security Council or the often unevenly distributed capacity of Global South countries to influence important areas of the global economy, such as trade. In this regard, Africans seek real development partners, not asymmetrical relationships where one party dictates and/or determines what the development priorities should be. To be fair, this is not only a view that applies to Western development partners, but to China as well. If any development partner is perceived by African governments as more trouble than benefit, the relationship will suffer. This phenomenon can be seen in the fact that, as of 2019, 14 African countries had still not signed on to the BRI. This shows that African countries can freely choose to engage with major development partners when they want to, and refuse when they do not.[38]

Therefore, ensuring that EU engagement via the GG is structured in a way that makes the programme attractive to African governments must be an important consideration amongst EU policymakers. Regular visits to the African continent by policymakers, significant and systematic outreach to African development experts, and making a concerted effort to show that Europe is primarily interested in helping Africa develop with the GG (and not primarily interested in countering China's influence), are all steps that can make the GG more effective.

→ Maximize engagements with Africa's recognized financial institutions.

Most of the current funding for the GG projects was previously committed and, unfortunately, there has been little discussion about accessing new funding in the post-GG era. 2027, seemingly years away still, is basically the near future. What is the structure of EU-Africa engagement going to look like after 2027? By beginning those discussions now, it can signal that Europe is not interested in providing a short-term injection of money into Africa, but rather really in helping the continent thrive in the upcoming decades.

Another important aspect of the GG that should be considered is, how to use Africa's recognized financial institutions. The stated implementation strategy for projects utilizes a "Team Europe" approach that prioritises European companies and institutions, meaning that European companies are the ones who benefit from building projects and implementing them on the continent. This approach is very similar to the Chinese approach of using almost exclusively Chinese corporations to implement projects on the continent, as part of the BRI. EU policymakers would be wise to leverage African institutions to oversee project implementation across the continent. These institutions have deep expertise across the continent, and leveraging them will make GG-funded projects more likely to succeed. Tapping into the knowledge and resources of highly reputable organizations such as the African Development Bank, the African Export-Import Bank, the African Guarantee Fund, Africa Finance Corporation and Africa50 is an easy win. By partnering with them, project implementation under the GG can improve as these institutions have well demonstrated expertise across the continent. This can also help the external perception of the GG. By delegating authority to in-country actors and African institutions, it is harder to argue that the GG is a primarily EU-led initiative. Rather, it would seem much more like a collaborative approach that is bringing development projects to fruition.

→ Develop a framework for engaging with African governments that have different values than the EU.

While it is easy to assume that Africa is a monolithic bloc of countries with similar value systems, that is not the case. This is an area where China may find it easier to engage with African countries, since, at least in the way it presents itself officially, it has little to no regard for domestic politics - which, as we have already shown, is quite different from the EU approach. That does not mean that GG funds need to become more like Chinese funds, with no governance commitments attached. However, there needs to be an understanding amongst EU policymakers that GG funds can and should be used to support the very real development needs of Africans as widely as possible, while at the same time promoting EU's interests in the continent. The EU's current approach usually leads to more funds being concentrated in countries that have value systems most similar to the West, but there are hypothetically many regions, even in authoritarian-leaning countries, where GG funds can be used to support EU priorities, such as education programmes or environmental responsibility. Using GG funds to expand economic and political freedom in the communities where projects are based is the goal that should be kept in mind. This is a difficult area to make hard and fast rules about, given the diversity of African states and the changing levels of democracy and authoritarianism even within any one single country over time. The increasing struggle between democracy and authoritarianism is a global phenomenon that we see playing out in Europe itself. Nevertheless, seeking ways to support EU priorities with GG funds is certainly possible in a variety of contexts that is wider than the GG's current distribution of funds, and the EU should investigate its capacities more deeply in this context.

→ Ensure that evaluation systems are structured in ways that track GG progress and its impact on development.

The tracking of GG funds and its impact on concrete outcomes on the continent is an important part of successful project implementation that should not be relegated to secondary considerations. Structuring evaluation systems that allow for the timely recording of GG projects, their status of implementation, and the impact they are having on the groups they are supposed to be engaging with is absolutely critical. These systems should consider in-country institutions that can help provide insight into the efficiency of a project and how it is, or is not, having the desired outcome that it is supposed to bring about. By successfully tracking these projects, EU policymakers will also have the ability to highlight success stories which could be used to improve the EU's image in the eyes of Africans.

→ Create a Media-Outreach Strategy to Highlight GG operations on the continent.

Our final recommendation is purely about the narrative: it is to systematically inform about what the GG is and what it is doing on the continent. Unfortunately, it is far too difficult to find information about GG projects without in-depth, in-country knowledge of a particular project. This should not be the case. When a GG-funded project is implemented, there should be an ample media-outreach strategy in the country where the project is located, as well as in Europe. Appearances on television, opinion editorials that detail the project and its projected impact, radio appearances, interviews – all these need to be used to bring GG projects to the knowledge of both Africans and Europeans. In addition, follow-up pieces about how projects have impacted African lives, perhaps using interviews and testimonials, could be a great way to highlight the positive aspects of the GG project better.

Conclusion

The EU's Global Gateway Initiative is a major project that has the potential to alleviate some of Africa's developmental challenges. While the GG is unlikely to solve the myriad challenges that the continent faces, we have discussed the various sectors that GG financing is intended to help, how policymakers can go about ensuring the successful implementation of these projects, and what EU policymakers must keep in mind when speaking about, and framing, the GG. In addition, we have discussed China's influence on the African continent, and argued that from an African perspective, it is not advisable to frame the GG as a direct competitor to the BRI. While the geopolitical struggle between the EU and China is an important problem that needs to be addressed in all areas of EU foreign policy, we argue that it is unwise to get sidetracked by the greater narrative of geostrategic competition over looking specifically at how successfully the GG is actually implemented on the African continent. Instead, focusing on how the GG can help Africans enjoy better livelihoods and improve the perception of the EU on the African continent is far more important and effective than talking about countering China. In an odd way, we believe that this approach is actually a direct way for the EU to counter China, since China's influence will wane with an increasing number of successful EU development projects that are improving the lives of Africans .

There are many benefits that can be brought about from the EU's GG and it is our hope that the recommendations and policy suggestions laid out in this chapter guide the thinking of EU policymakers who have the ability to influence how the GG is operationalized on the African continent.

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3. Perspectives from China on the Implementation of the EU Global Gateway Initiative

Claus Soong and Abigaël Vasselier

Since the inception of the EU Global Gateway (GG), its relations to China's Belt and Road Initiative (BRI) have been at the forefront of official discussions, media coverage and intellectual debates. The BRI has become the main lens through which China is looking at this European initiative. The core questions have been whether EU Global Gateway is a counter-proposal to the Belt and Road Initiative, and whether the EU and China can co-operate on the base of their respective strategies, or if it is only about competing on the world stage and in third countries. Some have questioned whether these are simply two rival projects depicting a fragmented global order where the value gap is not reconcilable. Navigating between co-operation, competition and rival models has been the trajectory for Europe and China when looking at each other's initiatives. The official discourse in China has focused on seeking co-operation and synergies of the Global Gateway with China's Belt and Road Initiative. At the same time, official party-state media and think tankers have expressed more skeptical views, almost confrontational when assessing the EU offer, especially with regard to its objectives of geopolitical competition and its implementation. The Chinese perspectives of the Global Gateway have been nuanced and varied across actors and time.

Seeking synergies and cooperation: Investigating the Chinese official discourse on the Global Gateway

Since the launch of the EU Global Gateway Initiative, Beijing has been consistent in its approach to the European offer focusing on co-operation and synergies. From "welcoming all initiatives to help developing countries" on the day of the launch of the EU Global Gateway Initiative, "being inclusive and seeking synergies" has been the priority for the Chinese leadership.[1] China's President Xi Jinping recently recalled China's official position on the EU Global Gateway when meeting President of the European Council, Charles Michel, and President of the European Commission, Ursula von der Leyen, on December 7, 2023. He stressed that "China is willing to continue advancing the high-quality construction of the 'Belt and Road,' including aligning with the EU's 'Global Gateway' plan, to jointly assist developing countries in accelerating their development."[2]

The Chinese perception of a potential for collaboration between China's Belt and Road Initiative and the Global Gateway builds on ten years of European signaling that there are avenues for joint projects. Following the launch of China's Belt and Road Initiative in October 2013, leaders had jointly agreed to "develop synergies between EU policies and China's 'Silk Road Economic Belt' initiative and jointly explore common initiatives along these lines"[3]. The European efforts thereafter had focused on integrating China into the EU Investment Plan, through the launch of the first EU-China co-investment fund, and the extended Trans-European Transport Networks with the EU-China Connectivity Platform.[4] Following the 2019 EU-China Summit, the European and Chinese leaders agreed that joint initiatives will be pursued on the basis of "shared principles of market rules, transparency, open procurement, a level playing field and fair competition, and comply with established international norms and standards, as well as the law of the countries benefitting from the projects."[5] This statement was made only five years ago and to China's leaders – whose mandate does not change every five years like it does in Europe – it remains highly relevant, while for European leaders it might seem like a lifetime ago.

Despite the fact that the arrival of a new European Commission in 2019 put these initiatives on hold, the Chinese official perceptions remain that such potential for co-operation, once agreed upon, remain valid. The presence of European leaders at every Belt and Road Forum organized by China and the existence of Memorandum of Understanding on the Belt and Road Initiative signed between China and several EU Member States[6] reinforce the perception that Europe has not given up on somehow endorsing the Chinese offer to the world and seeking synergies. **There is a European responsibility to also correct the Chinese narrative and perception on European endorsement of the Belt and Road Initiative and its potential for synergies with EU Global Gateway.** In that regard, there should be further consideration from the European side to constantly address misperceptions and false narrative in public communication following a high-level meeting with Chinese counterparts. The EU-China Strategic Dialogue of October 13, 2023 between China's Foreign Minister, Wang Yi, and High Representative and Vice President of the European Union, Josep Borrell illustrates this argument. The Chinese readout continues the push to "explore with an open attitude the alignment and co-operation between the Belt and Road Initiative and the Global Gateway of the EU" and seeks "co-operation in fields such as green and digital development, science and technology, and finance."[7] As a response, the European press release of the same meeting, whilst not referring to the Belt and Road Initiative, does not counter the narrative that synergies exist leaving the space for interpretation and misperception.

Beyond the narrative that seeking co-operation and synergies are a priority at the official level, China has adjusted its offer for co-operation with Europe with time, moving away from focusing on connectivity and infrastructure projects only to explore greener and more comprehensive proposals including health, climate or digital issues. China's success in getting the EU member states on board of the Chinese led projects have received mixed results. At the political level, Member States have equally maintained a form of strategic ambiguity vis-à-vis the Chinese offer. Most of them participated in the past editions of the Belt and Road Forum at different level, some of them endorsing the Chinese initiative, and a few like Italy recently disengaging from it.

On the implementation however, while the Chinese made some concrete proposals, co-operation has remained limited and synergies with Global Gateway are inexistent. The efforts of China's government agencies, such as the Ministry of Commerce (MOFCOM) to pursue project proposals in the fields of health, greening, digital, finance and technology under the umbrella of the Belt and Road and Global Gateway initiatives have not been matched with success. Interestingly, even the Comprehensive Agreement on Investment (CAI), frozen by the European Union after Beijing's retaliation to EU-imposed sanctions[8] in 2021, was reintroduced by Chinese leaders in 2022 as a potential deliverable to illustrate the synergies between the Belt and Road Initiative and EU Global Gateway.[9]

Seeking co-operation and synergies has only one purpose for Beijing: China's political intention is indeed to ensure that synergies between its Belt and Road Initiative and EU Global Gateway create better conditions for alignment between China and Europe. **As the US-China competition has been intensifying, the narrative in China has it that almost any project collaboration between China and Europe could be part of Global Gateway-Belt and Road synergies; as long as it fits a broader geopolitical interest, namely to compete with the US.** The term "alignment" itself appears in official Chinese document when talking about Global Gateway. For instance, at the last trilateral meeting between the Chinese President and his French and European counterparts, China offered Europe to cooperate on building stable and trustworthy supply chains through aligning with each other's respective strategies.[10]

China's views of EU Global Gateway Initiative as part of its strategic competition with the US

Consistent with China's vision of the world through "multipolarity," the EU Global Gateway is perceived as a European instrument to build spheres of influence and to respond to European geopolitical ambitions, notably in the Indo-Pacific. With the EU Global Gateway, Europe intends to become a normative power and seeks to gain the influence necessary to become a pole at the world stage. Several Chinese think tankers recognize that the Global Gateway's objectives are to protect European political influence and supply chains by increasing investment and consolidating strategic partnerships. Therefore, the EU's initiative can also serve to "restrain Chinese influence where European interests are affected."[11] Take, for example, the EU's data protection regime, where the Global Gateway is seen as an instrument to channel normative power and technological leadership, and to increase the EU's presence and influence by providing an alternative to the developing countries, especially in technological competition.[12]

In the eyes of Chinese think tankers and intellectuals, Europe's global ambitions are related to those of the US. To Chinese think tankers and party-state media, it is clear that the EU Global Gateway is an instrument to "form a united front against China's Belt and Road Initiative"[13]. The European initiative is described by many Chinese non-official sources as part of a broader effort of the West to contain Beijing's global ambitions, making a link between EU Global Gateway, the United States' Blue Dot Network initiative and the G7 Partnership for Global Infrastructure and Investment. The alignment between the EU and its like-minded partners, first and foremost the United States, is seen as an "establishment of anti-China democratic tech alliances and global supply chain value alliances. These alliances aim not only to economically isolate and suppress China but also to limit China's influence in rulesetting and standards formulation in related fields, squeezing China's rule-making discourse."[14] Even the government agency CIDCA, China's Development Co-operation Agency, echoes with the claims that the goal of said coalition were to "launch attacks against China in areas such as labor, environment, debt, quality, and transparency" in third countries, in order to prevent China's rise.[15] The European toolbox, which consists in deploying personnel in third countries, interfering in policy frameworks, and pushing for the EU norms, according to Chinese researchers from CIDCA intends to replace China's Belt and Road Initiative in the Global South.

Distinctions are made between the European Union and its partners in terms of the nature of this competition: The EU is recognized as being invested into competition, whereas the US is going for confrontation. For Chinese think tankers, this translates into the EU "prioritize[ing] a comprehensive approach, extending beyond military aspects to emphasize economic co-operation and social governance, relying on their soft power" while the US integrates a military component that could veer into conflict.[16] Consequently, this often leads China to acknowledge that the transatlantic relationship is facing some difficulties related to structural contradictions, long term unsolved issues and a lack of trust related to the Trump era.[17] It also reinforces a recommendation from Chinese think tankers, to "navigate the relationship with the EU Global Gateway strategy through a dual approach of competition and co-operation".[18] In that regard China should pursue its BRI-compliant infrastructure projects while at the same time seek synergies with the EU and other international organizations.

Competition in the Global South: Global Gateway has to prove its practicality

Since the launch of the EU Global Gateway, Chinese party-state media and the think tank community have looked into the competition between the European offer and the Belt and Road Initiative in third countries. At the same time, China's official narrative has focused on presenting an inclusive image in countries of the Global South. The official argument has been that "despite claims by some Western politicians that these initiatives aim to counterbalance or hedge against the Belt and Road Initiative,"[19] China views them positively. "China sees these initiatives as complementary, not opposing the Belt and Road Initiative".[20] By pushing such a narrative in third countries, China puts the responsibility of competition onto the West, positioning China as the country ready to co-operate in third countries and the EU as the unwilling partner. While the EU focuses on values and principles, China focuses on mutual benefits and inclusivity.[21]

The Chinese perception is, in fact, that the EU Global Gateway does represent a real competition to the Chinese offer on the ground. First, the deterioration of the relations between Europe and China as well as European criticism toward Chinese projects in Africa, Southeast Asia or Latin America creates obstacles to potential co-operation across the Global Gateway and Belt and Road Initiatives[22] Second, the nature and depth of the economic competition between the Chinese and European offers are sometimes irreconcilable, not to say mutually exclusive for partners. China perceives the European focus on digital technology, clean energy and other areas to be in direct competion with certain aspects of the Digital and Green Silk Roads.[23] Lastly, the European value-based approach is a significant and – for the Chinese side – cumbersome aspect of the European offer. This in turn means that partners have to make a choice between two offers that is about choosing between two competing and opposite models of governance and society.

Regardless of the degree of competition that the European offer presents, in reality, the Chinese stark assessment of EU Global Gateway deems it an ineffective and unappealing offer for third countries. Chinese think tankers and media find that the challenges related to EU Global Gateway implementation undermine its appeal to third countries, making the EU offer uncompetitive. From the Chinese view, there are three difficulties in the European offer: decision-making processes and coherence, funding and financing, and, norms and standards. European investments are perceived as complicated due to the complexity of EU decision-making processes.[24] The fact that Member States need to unanimously approve of projects is seen as a weakness.[25] In addition, offers made to third countries by single Member States are sometimes not coherent with those of the EU, which makes European presence on the ground appear fragmented rather than united. The deficit in funding is one of the main issues hinders the roll-out of the EU's Global Gateway. Limited public funding and struggles to mobilise private investors make it difficult for the EU to finance high-quality infrastructure.[26] In addition, the energy crises, depreciation of the Euro, and US interest rate hikes, as well as the war in Ukraine have decreased funding capacities for European stakeholders."[27] Restrictions imposed on companies, including Chinese ones, to access financing offered by the European Bank for Reconstruction and Development (EBRD) are perceived as additional hindering factors to the European offer's competitiveness.[28] EU norms and high standards are equally viewed as unrealistic to achieve for African counterparts. Regarding investments in Asia, the ASEAN region is not a priority on the EU's political agenda[29] and there are limited prospects in India.[30] Most potential partners in Central Asia are also considered unlikely to find a European offer that imposes strict environmental requirements appealing, as such requirements are adding costs to their domestic industries and weaken their competitiveness.[31]

Taking into account the existing competition between the Chinese and European initiatives as well as the challenges identified above, some Chinese researchers see the potential for adjusting the Chinese approach exploring complementarity with Europe – a win-win scenario with Chinese characteristics that would ultimately make both Chinese and European ends meet? A researcher from Qianhai Institute for International Affairs, for example, suggests that given the EU'S emphasis on responsible investments, Chinese companies can be compliant and deliver these high-quality infrastructure projects funded by the EU to African partners: "China's infrastructure capabilities plus EU principles could provide Chinese companies a powerful competitive edge in Africa."[32] This comes not only in contradiction to some Chinese views that the two offers are mutually exclusive for partners in third countries, but also present some real challenges from a European perspective – ranging from level playing field, unfair competition, and a growing gap between values and principles.

Conclusion

→ The Chinese assessment is marked by realism and pragmatism.

Over time China has expressed various degrees of concern and pragmatism regarding possibilities of competition and co-operation with Global Gateway, depending on specific actors and context. While China officially portrays the EU's initiative as complementary rather than adversarial to its own investment strategies in the Global South, with potential for co-operation and even alignment, concerns persist regarding the EU's global ambitions and its potential competition with China's Belt and Road Initiative. China's assessment of the Global Gateway is very clear regarding the political framing of the EU's offer, the challenges related to the project's implementation and skepticism demonstrated by its recipients. Uncertainty about Global Gateway's performance exist among the Chinese researchers as they see limited progress. Hence the majority of the Chinese views expect the Global Gateway to perform poorly.

The gap between the narrative of co-operation and the actual scope for working together on the ground reflects a degree of realism from both China and the EU on their disagreements and divergences over norms, values and standards as well as a geopolitical reality.

→ The context and narrative of Chinese official statements and speeches that mention the Global Gateway often refer China's efforts to manage bilateral relations constructively amid an intensified US-China competition by offering some scope for co-operation.

The exact meaning of co-operation remains vague, particularly with regard to how China's contributions can align with the value-based prerequisites of the Global Gateway Initiative, possible joint projects or even complementary.

→ Strategic competition dominates the Chinese views.

Chinese experts regard the EU Global Gateway Initiative is almost always in comparison to China's Belt and Road Initiative, but seldom on its own. As a European offer to the world, the geopolitical dimension of the EU initiative is essential. For China, this means first and foremost its strategic competition with the US. China's prime interest is to take the advantage in its strategic competition with the US. If all areas of the EU-China bilateral relations are considered by China through the prism of its competition with the US, and more precisely as a possible leverage to be used, EU Global Gateway is no exception.

The Chinese discourse surrounding the EU Global Gateway has, hitherto, never really been about assessing the initiative for its capability of bringing connectivity and infrastructure projects to developing countries, but has rather been a lens through which to understand China's vision of the world and its strategic competition with the US.

→ Global Gateway is most often perceived as part of the 'American-led West' to contain China and its Belt and Road Initiative.

Indeed, it is part of the European global ambitions, including in the Indo-Pacific, and aligned not with China's Belt and Road Initiative, but rather with G7 or US-led initiatives. It also clearly restrains China's global ambitions by building spheres of influence in the Global South.

→ Chinese perceptions of the EU Global Gateway reflect the overall idea that Europe is a key factor in China's relationship to the US.

Ever since the EU's shift towards a more robust and realist approach to China in 2019, co-operation on infrastructure and joint EU-China projects on connectivity has been limited, and so has been the Chinese offer to Europe. At the same time, China has not yet renounced to charming Europe and proposing co-operation, including in the context of the Belt and Road Initiative, in order to hedge and balance the US-China relations.

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Executive Summary and Policy Recommendations

Nele Fabian

The EU Global Gateway's (GG) is meant to represent a competitive alternative to Chinese infrastructure projects that are funded through the Belt-and-Road Initiative (BRI). A comparison of key observations on this from an EU expert, Chinese, and African perspective allows for a broadened assessment of GG's performance so far. Current shortcomings identified may be overcome during the EU Commission's new term, 2025-2029. The suggestions presented in this study may support EU decision-makers to fully tap into GG's potential, allowing it to become the alternative it seeks to be. Improving performance of the GG will strengthen Europe's partnerships on the African continent, and solidify Europe's standing as a competitor to China.

Enhancing Global Gateway's competitive messaging

The EU Global Gateway (GG) and China's Belt-and-Road Initiative (BRI) are competitive in two ways:

1) Complementary investment between the EU and China on the African continent is on the decline. Both the EU and China have downscaled common investment goals due to a growing ideological gap and diminishing trust. On the ground, synergies between BRI and GG are practically inexistent.

2) The EU's competitive goals are recognized in the Chinese discourse on the GG. At the core, Chinese experts do perceive Global Gateway very much as competition for Chinese interests in the Global South. To Chinese experts, GG partnerships express that partners who consciously subscribe to GG's inherent value package, are making a geopolitically relevant statement. The EU can use this knowledge to its advantage and step more firmly and explicitly into the role of the challenger.

Countering China's 'synergy-seeking'-narrative

Nevertheless, both Chinese government and African public statements tend to label the EU's GG as "complementary" with China's BRI. Pan-African opinion polls show that Africans regard the combined achievements of GG and BRI projects as powerful, regardless of China's and the EU's highly different investor profiles. Beijing, in turn, upholds its own 'synergy-seeking' narrative as it allows China to present itself as 'unreserved' and 'open for collaboration', leaving it to the EU to present as the 'challenger' that calls any form of 'competition' in the Global South. The EU Commission should consider that international media readily pick up on China's 'synergy/complementation' narrative, and that they often do so with a considerable lack of nuance. This narrative, however, neglects that the larger geopolitical context has shifted in recent years, and that the EU has taken a large step back from collaborative efforts.

→ The EU Commission needs to be aware that China uses its synergies-seeking narrative for its own strategic messaging, seeking to smooth out the edges of the EU's competitive claim. The Commission should course-correct China's messaging, clearly communicating the lacking nuance in international media.

Strengthening Global Gateway structurally

Global Gateway currently still lacks a clear long-term vision, and presents with a high degree of fragmentation between projects. An improved coherence of the greater scheme would strengthen GG's impact as a de-risking/diversification strategy. The EU should also ensure recognition of GG's geostrategic importance throughout all areas of implementation, aligning project planning and schedule, Europe's future economic goals and partner countries' development plans with Europe's role in international relations and security policy. It is also advisable to integrate GG strategically with complementary investment strategies of likeminded partners. Not only would this substantially enhance the EU's critical impact, but it would also increase its weight in the on-going competition with China.

→ The EU Commission should place additional focus on long-term programming through priority corridors and networks in the field of connectivity (digital, energy, transport).

→ GG's planning and management should be cross-institutional, led by an enlarged task force that includes the EU Commission, the European External Action Service and the European Investment Bank.

→ Follow-up implementation beyond 2027 should already be prepared and communicated to partners. Any lack of predictability of GG's long-term investment setup plays into the hands of Chinese investment communication, since BRI is – at least officially – supposed to run until 2049.

→ The EU should integrate GG into an increased collaboration with India and Japan, with whom the EU already shares connectivity partnerships, but also with other important partners, such as the USA, Canada, Australia, the UK, and Switzerland.

Acting on criticism and misconceptions of the EU Global Gateway

Investigating criticism can be one of the most powerful tools to turn a strategy's weak points into strengths. A proactive effort to face expectations and counter misconceptions before they fully manifest can build trust, strengthens partnerships, and demonstrates strength in the context of competition.

Insisting on quality and durability

The most common criticism towards GG concerns its norm-heaviness. Compared to China's BRI, Europe's quality-oriented and value-based investment approach is often not sufficiently competitive on speed; for quick implementation and a low administrative threshold, African partners will are likely to continue to give priority to Chinese investments.

→ GG project implementation should not aim for competitive speed. Instead, the EU should fully own its focus on quality and collaborative sustainability.

Integrating partners on the ground more profoundly

To date, GG still prioritizes European financial institutions and companies to implement projects by default. This repeats the same mechanisms that China is often being rightfully criticized for, and misses the chance of deepening both partnership and applied expertise on the ground. Project implementation should therefore seek to fully employ existing supportive structures in partner countries.

→ The EU should seek proactive engagement of partner countries' own private sectors and financial institutions, as well as multilateral development banks.

Demonstrating the EU's competitive independence to China

Critical views in China interpret GG as strategically seeking to oust Chinese influence in third countries. This signifies that GG does, indeed, send a strong message. However, they also tend to frame GG as part of an 'anti-Chinese alliance' of the 'West led by the US', which aims to 'weaken China's global influence'.

→ The EU Commission's communication of GG goals should proactively address this impression and reinforce demonstration of the EU's competitive independence.

Addressing concerns against European influence on the African continent

Norm-bound project implementation is becoming a sensitive topic for Africans, especially when direct influence on African governments is concerned (for example, if governance adaptations are a prerequisite for EU investment). The same criticism, although it would be valid, is not equally applied to Chinese influence on the continent, since China is not a former colonizer and – officially! - vows to keep investment separate from any political agenda.

→ The EU should demonstrate awareness of discursive trends to improve open discourse with partner countries and their societies, especially where public opinions reflect that equality in partnership is perceived to be insufficient.

→ To counter the widespread impression that Africa is simply used as a playground for power play between the EU and China, GG implementation should aim for a maximum of independent agency for its African partners, and communicate GG's collaborative strengths to the public on the continent.

→ Communication of the GG in Africa should proactively counter sentiments of marginalization regarding African societies' own role in geopolitics.

Strengthening a narrative that demonstrates European strategic independence

A comparison of the different viewpoints presented in this publication reveals that it is important to improve general communication of the GG in partner countries, in the EU, and internationally. Communication output needs to increase, and it needs to be targeted carefully.

→ The EU Commission should comprehensively disclose what GG funding entails, what it does not entail, and how projects are categorized and implemented. This information needs to be detailed, easy to understand, and readily avail-able, especially on the African continent, but also in Europe.

→ Project work should be embedded in a strategic narrative that walks the recipient through all important levels of the initiative, presents long-term intentions and offers critical result assessment.

Bringing nuance to GG's strategic goals

On the African continent, public assessment the GG could be significantly improved if the narrative demonstrated that GG is first and foremost about partnership with Africa, rather than about competition with China. Communicating priorities the other way around sends an ambiguous message that is received with skepticism.

→ A cross-continental media-outreach strategy that systematically informs about investment goals, real-time progress, and successes would help strengthen GG's reception and image in Africa.

→ Outreach should be expanded also to African countries currently excluded from partnership, as they still contribute significantly to pan-African discourse on the GG.

In the Chinese discourse on EU investment, we can observe a high degree of ambivalence in the interpretation of GG's concrete goals, relevance, and impact. This, perhaps, tells us less about GG messaging itself than about the fact that the Chinese discourse is missing a uniform assessment of where Europe stands geopolitically. Beijing also seems to be more aware of its forward-looking partnership agreements with single EU member states than it is of a changing relationship with the EU as a whole.

→ To strengthen the EU's authority in Chinese leaders' minds, the EU Commission should communicate more clearly how its strategy towards co-operation and competition with China has shifted independently of partnerships between China and single EU member states.

About the Authors

Denis Foretia

is Co-Chair of the Denis & Lenora Foretia Foundation and Executive Chairman of the Nkafu Policy Institute in Yaoundé, Cameroon. He is also the Chairman of Merckshire LLC, an international holding company with operations in the US and Cameroon. A surgeon by training, Foretia has always been involved in philanthropic activities and issues related to international development. He is currently the President of the Association of Cameroonian Physicians in the Americas (ACPA). He is also the Co-Founder and pioneer president of the Cameroon Professional Society (CPS) – the premier institution for Cameroonian professionals in the US focused on advancing economic opportunity and leadership development among Cameroonians. As the former Executive Co-chair of the Meharry-Vanderbilt Alliance, he helped spearhead major community service-oriented and leadership-driven projects geared towards uplifting inner-city children in the Greater Nashville area. His leadership as National President of the Cameroon Students Association (CAMSA-USA) saw a paradigm shift towards positive intellectual discourse and the development of philanthropic projects that solidified CAMSA's standing in the community as the premier student organization in the diaspora. Denis remains very involved with helping young Cameroonians transition into professional institutions and advance in their professional careers. He has been recognized with multiple academic and professional awards such as the Vanderbilt Deans Scholarship, the Overall Fellowship, and the Community service award from CAMSA.

Jean Cedric Kouam

is an economist, researcher and Director of Economic Affairs at the Nkafu Policy Institute in Yaoundé, Cameroon. A former French Government Fellow (Doctorate Fellowship Program), he holds a PhD in Economic Analysis and Policy (Monetary and Financial Macroeconomics) from the University of Dschang in Cameroon and a Diplôme d'Etudes Approfondies (DEA) in Mathematical Economics and Econometrics from the University of Yaoundé II. He has taught courses in economics, finance, and macroeconomic modeling at several private higher education institutions in Cameroon. A member of several research groups and laboratories in Cameroon and abroad, his research interests especially include monetary and fiscal policy coordination, Africa's economic development, economic resilience of countries, effectiveness of cyclical and structural policies, monetary union policy, sustainable development, and social entrepreneurship. He holds several certifications, notably in sustainability and public debt management in low-income countries and in fiscal programming and policy from the IMF, Google Data Analytics/ Google, and think tanks from amongst the Atlas Network, among others. Jean Cedric has also conducted research at the Bank of Central African States (BEAC), where he is currently involved in numerous research activities. He is the author and co-author of numerous reports and articles published in peer-reviewed journals.

Robert Nantchouang

is Professor at the Faculty of Social Sciences and Management of the Catholic University of Central Africa a Senior Strategic Consultant to the Nkafu Policy Institute, Yaoundé, Cameroon. His diversified academic and international career has led him from higher education to the management of capacity development projects as well as knowledge management within the African Capacity Building Foundation (ACBF), the African Union's Specialized Agency for capacity building. He served for more than a decade at the ACBF, prior to holding the position of Executive Director of the African Culture Fund (ACF), a pan-African organization created in February 2020, with the mission to ensure the prosperity of the creative sector through the professionalization of artists and cultural actors. Robert Nantchouang is a Certified Knowledge Manager (CKM, Washington), and holds a PhD in economics from the University of Paris-1 Panthéon-Sorbonne as well as a Master's Degree in economics from the University of Montreal. He is also a statistician (Master ENSAE-Paris, and Statistician Engineer, ISSEA). Married and father of four, Robert Nantchouang has research and work experience in 35 African countries, 7 European countries and 2 North American countries.

Claus Soong

is an analyst in MERICS' Foreign Relations team specializing in China's foreign policy. Prior to joining MERICS, he gained experience working with organizations such as the International Crisis Group and the Center for China and Globalization in Hong Kong and Beijing, and Greenmantle in New York. Claus holds master degrees from the University of Delaware, Tsinghua University as a Schwarzman Scholar, and National Chengchi University.

Abigaël Vasselier

is Director for Policy and European Affairs at MERICS, where she also heads the China's Foreign Relations programme. Previously, Abigaël worked as Deputy Head of Division for China, Hong Kong, Macao, Taiwan and Mongolia at the European External Action Service (EEAS). Prior to that, she was a Policy Fellow and Programme Coordinator at the Asia Programme of the European Council on Foreign Relations (ECFR). She has authored several articles related to European China policy and China's foreign policy. Her most recent piece was on China-Russia: A security threat for Europe. She has co-authored the book China at the gates: *A new power audit of EU-China relations*. Abigaël holds a Master's degree in Asian Politics from SOAS in London and she also graduated in International Relations from Sciences Po Aix and has a Bachelor degree in Chinese language. She studied Chinese at China Foreign Affairs University in Beijing.

Gunnar Wiegand

is the former Managing Director for Asia and the Pacific at the European External Action Service (EEAS), 2016-2023. In this capacity, he was the EU's Senior Official for relations with ASEAN, Asia (ASEM) and the Indo-Pacific area. He was a key contributor to the EU's new policy orientations on EU relations with China (2016, 2019) and India (2018), as well on the EU Strategy for Cooperation in the Indo-Pacific (2021) and EU-Asia Connectivity (2018, precursor of the EU's Global Gateway initiative). He led the negotiations on the establishment of the EU-ASEAN Strategic Partnership (2021) and was also the EU's Chief Negotiator for the new EU-Japan Strategic Partnership Agreement. Prior to this function, Gunnar Wiegand served as Director for Russia, Eastern Partnership, Central Asia and OSCE (2011-2016) at the EEAS.

At present, he is Visiting Professor at the College of Europe in Bruges, Belgium, and at the Paris School of International Affairs (Sciences Politiques). He is also Visiting Distinguished Fellow at the Indo-Pacific Program of the German Marshall Fund of the United States (GMF, Brussels Office) and Senior Adviser and Member of the Strategic Board of the European Policy Centre (EPC).

Among his publications are:

- "China-Russia Alignment: A Threat to Europe's Security", with Sabanadze, Natalie and Vasselier, Abigaël in MERICS Report, Chatham House and GMF, 26 June 2024, https://www.gmfus.org/news/china-russia-alignment-threat-europes-security;

- "The EU and its Eastern Partnership: Political association and economic integration in a rough neighbourhood" with Evelina Schulz, in European Yearbook of International Economic Law EYIEL 6 (2015), Springer, 321-358.

About the Editor

Nele Fabian

is Senior European Affairs Manager at the European Dialogue Regional Office of the Friedrich Naumann Foundation for Freedom (FNF) in Brussels, where she responsible for projects related to the EU's economic relations and their role in geopolitics, as well as EU-Chinese relations. Her academic background is in political science and Chinese studies and she has a total of two years of study and research experience in the Greater China region. In 2020, she completed her PhD in Modern Chinese History at Ruhr University Bochum, Germany, where she focused on 20th century environmental policy, circular economy and urban public governance in the People's Republic of China.

FNF's European Dialogue Programme (https://www.freiheit.org/european-union) has offices in Brussels, Geneva, Madrid, Prague and Vilnius. Through the connection of EU experts, civil society, and decision-makers FNF seeks to foster open dialogue and discuss liberal policy solutions to European challenges. Together with liberal partners, FNF develops formats and campaigns to promote the rule of law, free markets and human rights. Moreover, FNF coordinates EU co-funded projects in the field of democracy support, development cooperation and human rights protection.

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IATP contributes to the IEA's production of reports, books and papers on all areas of economic policy, as well as a termly journal, Economic Affairs. IEA's policy experts frequently contribute to newspapers, broadcast media and websites to further the dissemination of free-market thinking. IEA also holds an extensive series of conferences, seminars, lectures and working lunches (100 – 150 events a year) that bring together politicians, students, journalists, leading business figures, academics and others interested in public policy.

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The Nkafu Policy Institute (https://nkafu.org/) is a leading African think tank at the Denis and Lenora Foretia Foundation (https://www.foretiafoundation.org/), Yaoundé, Cameroon, which works to catalyze Africa's economic transformation by focusing on social entrepreneurship, science, technology, health, and the implementation of development policies that create opportunities for all. As an independent, research-driven think tank, the Nkafu Policy Institute leads the way in providing in-depth, insightful, and innovative policy prescriptions on development issues within the region and specifically on the promotion of free enterprise. Nkafu is increasingly recognized in sub-Saharan Africa as a leading think tank for research, project management, and convener on diverse issues. The Foundation is registered in the United States and Cameroon and has ongoing activities with a diverse group of partner organizations.

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