

CHASING CONVERGENCE: THE EU'S PARTNERSHIPS IN THE INDO-PACIFIC AND IMPLEMENTATION OF THE GLOBAL GATEWAY INITIATIVE



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1. Introduction

1.1 – What is the Global Gateway (and What Is Not)?

The Global Gateway (GG) initiative embodies the European Union's (EU) flagship infrastructure investment and connectivity strategy. Launched in December 2021, it is designed to mobilize up to 300 billion EUR in investments between 2021 and 2027. Conceived in response to both growing global infrastructure needs and strategic competition, GG represents a shift in the EU's approach to development cooperation, moving beyond traditional Official Development Assistance (ODA) to a blended model that combines public funds, private capital, and partnerships with like-minded actors. It explicitly integrates geopolitical objectives into connectivity and infrastructure financing, and implicitly aims to position the EU as a values-driven alternative to competing initiatives such as China's Belt and Road (BRI).¹

Institutionally, GG is managed primarily by the European Commission's Directorate-General for International Partnerships (DG INTPA), with contributions from other Commission DGs, the European External Action Service (EEAS), the European Investment Bank (EIB), and Member States through the Team Europe framework.

GG's scope covers five thematic pillars: digital (including 5G, submarine cables, and data infrastructure), climate and energy (renewables, hydrogen corridors, energy interconnections), transport (ports, rail, and road connectivity), health (pharmaceutical supply chains, manufacturing facilities), and education and research (skills development, academic exchanges). These areas are intended to evolve in line with shifting geopolitical and technological contexts. Recent initiatives, such as GG projects supporting secure submarine cable routes – including the Blue Raman intercontinental submarine cable stretching from Europe to India with intermediate landings in the Middle East and Eastern Africa² – illustrate how GG is expanding into critical maritime and cyber infrastructure domains.

Geographically, GG is global in ambition, with priority regions including Africa, the Indo-Pacific, the EU's Eastern and Southern Neighbourhoods, and Latin America/Caribbean. Nevertheless, under the current resource

¹ While EU official documents and statements from the Commission's DG-INTPA about the GG initiative do not explicitly frame it as an alternative to China, Commission President Ursula von der Leyen drew such a parallel in a public statement: "Countries made their experience with Chinese investment. And they need better and different offers....They know we are transparent; they know it is accompanied by good governance, they know there will be no unsustainable debt left over, they know this is with the country itself inclusively that we design the project...and we bring on top of that the private sector with us, a private sector that in such a way does not exist in China. So, it is a true alternative." Source: European Commission, *Read-out of the College Meeting/Press Conference by European Commission President Ursula von der Leyen and Commissioners Jutta Urpilainen and Olivér Várhelyi (online) on the Global Gateway, Brussels: European Commission, 2021, video, <https://audiovisual.ec.europa.eu/en/video/I-215052>.*

² European Commission. "Global Gateway: Africa, the European Union and the African Union Take Stock of Significant Progress.", May 21, 2025. https://international-partnerships.ec.europa.eu/news-and-events/news/global-gateway-africa-european-union-and-african-union-take-stock-significant-progress-2025-05-21_en.

allocation (the 2021-2027 Multiannual Financial Framework), Africa emerges as the primary area of geographic focus. With a geographical focus on Africa, as the Global Gateway Africa Europe Investment Package was endowed with 203 million EUR from the EU budget for 2021–2024 and overall, the bloc pledged to allocate 150 billion EUR for Africa under Global Gateway “to narrow the investment gap and de-risk investment mobilization in [the continent].”³ Yet, the Indo-Pacific is also expected to receive a significant share of funding, as the EU has indicated an allocation in the range of 10–12 billion EUR,⁴ reflecting both economic opportunities and strategic concerns over supply chain resilience and regional security.

Financially, the 300 billion EUR target is to be met through a combination of EU budget instruments (notably the Neighborhood, Development and International Cooperation Instrument; NDICI–Global Europe), the EIB, European Bank for Reconstruction and Development (EBRD), and leveraged private sector investment. While precise breakdowns fluctuate with project pipelines, preliminary allocations suggest a strong emphasis on climate/energy (up to 50 percent of total commitments⁵), followed by digital infrastructure, transport, and human development.

Overall, Global Gateway seeks to deliver “sustainable and trusted” infrastructure that advances partner countries’ development priorities while serving EU strategic interests. By linking connectivity investments with governance, environmental, and transparency standards, GG positions itself not just as a funding mechanism but as a norm-setting platform in the contested global infrastructure space. Notably, its inception coincides with the rise of several similar initiatives seeking to adjust the course of global development cooperation by centering strategic interests and catalyzing commercial investments. These include the G7 Partnership for Global Infrastructure and Investment (PGII), which is the latest avatar of the US-led G7 Build Back Better World (B3W) Initiative, and the UK’s Clean, Green Initiative (CGI). Consequently, the initiative aims to grow the EU’s geopolitical muscle as it allows the bloc to leverage trade and investment as its geostrategic “key foreign policy tools”.⁶

3 European Commission. “Global Gateway: Africa, the European Union and the African Union Take Stock of Significant Progress.” May 21, 2025. https://international-partnerships.ec.europa.eu/news-and-events/news/global-gateway-africa-european-union-and-african-union-take-stock-significant-progress-2025-05-21_en.

4 European Parliament. *Southeast Asia*. Factsheets on the European Union. Accessed August 1, 2025. <https://www.europarl.europa.eu/factsheets/en/sheet/183/southeast-asia>.

5 Gerasimcikova, Alexandra, and Farwa Sia. 2024. *The Global Gateway: Rhetoric Versus Reality in the EU's Infrastructure Plan*. Brussels: European Network on Debt and Development (Eurodad). https://assets.nationbuilder.com/eurodad/pages/4589/attachments/original/1728405785/01_EU-GG-report-2024-FINAL.pdf.

6 Borrell Fonteles, Josep. *The Year That War Returned To Europe: EU Foreign Policy in 2022*. Brussels: European External Action Service, 2023. https://www.eeas.europa.eu/sites/default/files/documents/2023/20230369_PDF_OF0323029ENN_002.pdf.

Global Gateway at a Glance	
<p>WHAT?</p> <p>Defining the Global Gateway Initiative</p>	<p>The EU's flagship international infrastructure and connectivity strategy (launched December 2021) to mobilize up to €300 billion by 2027 for high-quality, sustainable investments in digital, energy, transport, health, education, and research. Branded as a values-driven alternative to China's Belt and Road, it builds on existing EU aid instruments but with a sharper geopolitical focus.</p>
<p>WHO?</p> <p>The placement of the Initiative within the EU's institutional architecture</p>	<p>The initiative is led by the European Commission's DG-INTPA, with the EEAS as a core partner. Delivered through Team Europe Initiatives, EFSD+ investment windows, and a Business Advisory Group.</p>
<p>WHY?</p> <p>The strategic rationale behind the Initiative</p>	<p>The GG initiative positions the EU as a rules-based, sustainability-driven competitor in global infrastructure, linking geoeconomic strategy with development goals and EU's own priorities such as green and digital transformation.</p>
<p>WHERE?</p> <p>Regional areas of focus of the initiative</p>	<p>Major focus on Africa, Indo-Pacific (notably Southeast Asia, Pacific Islands, India), Latin America and Caribbean, and the EU Neighborhood (Eastern Partnership, Western Balkans, Southern Mediterranean).</p>
<p>HOW MUCH?</p> <p>The committed amount of resources for the Initiative's implementation</p>	<p>Up to 300 billion EUR (2021–2027) from EU budget grants (18 billion EUR), EFSD+ guarantees (135 billion EUR leveraged investment), European development banks (approx. 145 billion EUR), Member State contributions, and mobilized private capital.</p>

1.2 – Many Hopes, Many Hiccups

As the EU's "positive offer" of investment and connectivity cooperation, the GG reflects two overarching paradigm shifts within the bloc's external action: the pursuit of "principled pragmatism"⁷ and its "geopolitical awakening."⁸ Specifically, it aims to maximize the effectiveness and visibility of the EU's global cooperation efforts, including endeavors with strong normative underpinnings, such as the commitment to providing global public goods, while defending its strategic interests. To this end, the EU's aspiration to strike a balance between an interest-driven and a normative outlook on its external action is conspicuous in its emphasis on synergies between the GG and its Indo-Pacific strategy. While the GG centers on investments in connectivity as a geopolitical tool, the strategy unequivocally frames the EU as one of the global promoters of democracy, human rights, and good governance.

Crucially, the GG is hardly the first effort of the EU to strike a balance suggested by the notion of principled pragmatism. Introduced as a guiding framework under the EU Global Strategy, this approach has faced criticism for its perceived internal contradictions. While "principles" imply a universalism of fundamental values that should guide the EU's external action, "pragmatism" denies the moral imperatives inherent in those universal categories. Consequently, in its quest for this operational equilibrium, the EU would rhetorically maintain its commitment to advancing democracy and human rights, but substantively review the scope of its normative action on a case-by-case basis. Such an approach risks increasing perceptions of inconsistency, self-interest, and double standards, which may undermine the EU's credibility and identity as a "normative power".⁹

Indeed, these are some of the very criticisms weighed against the GG. Inconsistency manifests itself, among other domains, in official narratives and branding of the initiative. While Brussels has described the GG as a tool to mitigate its "lack of visibility and recognition"¹⁰ in the infrastructure cooperation space, brand recognition remains vexingly low among third-country beneficiaries and potential co-investment partners alike.¹¹ At present, it remains unclear which projects are directly attributed to the GG and which fall under the broader Team Europe Initiative without being formally part of the GG. Additionally, stakeholders in beneficiary countries also point to confusion around the attribution of infrastructure projects implemented by individual member states and the EU.¹²

7 Mario Damen, *Values on the Retreat? The Role of Values in the EU's External Policies*, (Brussels: European Parliament, Directorate-General for External Policies, Policy Department for External Relations, March 2022), accessed August 9, 2025, [https://www.europarl.europa.eu/RegData/etudes/STUD/2022/639318/EXPO_STU\(2022\)639318_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/STUD/2022/639318/EXPO_STU(2022)639318_EN.pdf).

8 European External Action Service, *Europe in the Interregnum: Our Geopolitical Awakening after Ukraine*, March 24, 2022, https://www.eeas.europa.eu/eeas/europe-interregnum-our-geopolitical-awakening-after-ukraine_en.

9 Ian Manners, "Normative Power Europe: A Contradiction in Terms?," *Journal of Common Market Studies* 40, no. 2 (June 2002): 235–58, <https://doi.org/10.1111/1468-5965.00353>

10 Stuart Lau and Barbara Moens, "EU to Launch Global Gateway Projects, Challenging China's Belt and Road," *Politico*, December 20, 2022, <https://www.politico.eu/article/global-gateway-european-union-launch-china-belt-and-road/>.

11 Non-EU diplomats and local stakeholders in discussion with authors Seoul, February 2025; Tokyo, March 2025; Suva, March 2025; and Hanoi, April 2025.

12 Local stakeholders in discussion with authors Hanoi, April 2025.

The issue of defining and branding the GG is also interlinked with allegations of excessive self-interest in the design and implementation of the initiative. The GG points to the EU's embrace of a new paradigm of international cooperation. Specifically, it is informed by a shift from a more traditional, *vertical* model of aid from a rich entity to poor countries to a novel, *horizontal* blueprint for cooperation between equal partners in which beneficiaries "want to be more than subjects of aid."¹³ However, this horizontal model finds its underpinnings not in normative motivations, but interest-driven rationale of the initiator of cooperation, which in the case of GG is the EU.

Self-interest in and of itself does not have to be derogatory. Indeed, a more strategically assertive European response to competing initiatives, such as China's Belt and Road Initiative (BRI), is warranted.¹⁴ Yet, according to the perception of stakeholders interviewed in the context of this analysis, the GG has so far prioritized EU-centric considerations in a way that undermines its own stated goals. Decisions about projects are frequently criticized as excessively top-down,¹⁵ shaped by EU institutions and development finance actors, often in consultation with European corporate stakeholders.¹⁶ There is coordination with third-country partners; for example, there are already well-established mechanisms between the EU and Japan which involve the bloc's different bodies, institutions such as DG-INTPA, EIB, and EBRD, with consultations transpiring through official partnership frameworks or on an ad-hoc basis. Yet, these dialogues also replicate a top-down, vertical hierarchy by perpetuating the supremacy of North-North coordination. In other words, there is limited input from beneficiary countries, elected bodies, or civil society in the partner countries.¹⁷ This contradicts the GG's stated aim of fostering "horizontal partnerships" and co-designed projects. Moreover, many stakeholders fail to clearly differentiate GG from prior initiatives, raising concerns that the strategy reflects a rebranding exercise more than a transformative shift.¹⁸

Accusations of double standards stem from the EU's selective emphasis on normative values across different partnerships. While the GG purports to promote a more democratic and transparent model of development cooperation, such principles are applied unevenly. Just Energy Transition Partnerships (JETP) illustrate this contradictory dynamic well. For example, in contexts where the EU has significant strategic and economic interests, such as Vietnam, connectivity projects have sometimes advanced with less emphasis on democratic governance or civic participation..¹⁹ In contrast, more rigorous conditionality is imposed elsewhere, such as South Africa, despite the country's minimal historical contribution to global warming. This inconsistency in the application of values fosters skepticism among recipient

13 European Commission, *Remarks on Building Sustainable International Partnerships as a Team Europe*, October 1, 2024, https://ec.europa.eu/commission/presscorner/detail/en/speech_24_5008.

14 Jacob Mardell, "Will the EU's Global Gateway Launch a 'Race to the Top?'" *Internationale Politik Quarterly*, November 3, 2023, <https://ip-quarterly.com/en/will-eus-global-gateway-launch-race-top>.

15 Sergio Rodríguez Prieto, *Global Gateway's Moment of Truth*, European Democracy Hub, April 23, 2024, <https://europeandemocracyhub.epd.eu/global-gateways-moment-of-truth/>.

16 Caritas Europa, *Civil Society Calls on EU to Rethink Global Gateway's Approach*, Caritas Europa, March 20, 2025, <https://www.caritas.eu/civil-society-calls-on-eu-to-rethink-global-gateways-approach/>

17 Local stakeholders in discussion with authors Suva, March 2025; Hanoi, April 2025.

18 EU official in discussion with authors Brussels, April 2025.

19 Non-EU diplomats and local stakeholders in discussion with authors Hanoi, April 2025.

countries, who may perceive the EU's normative rhetoric as contingent on geopolitical convenience rather than a principled commitment.

1.3 – Towards a “Relational” Global Gateway?

The presented challenges to implementing the GG point to two dynamics. Firstly, the novelty of the initiative may hamper its image and effectiveness. Secondly, it ought to be borne in mind that the GG does not exist in a vacuum but rather, represents a shift in the model of infrastructure and connectivity cooperation which has already been embraced by numerous development partners – whether China as Europe's partner, competitor, and systemic rival, or its like-minded partners including Japan and Australia. These actors have long seen development cooperation as a means to achieve their strategic interests – even if contributing to the development of partner countries constitutes the paramount consideration as they formulate cooperation projects.

Consequently, the primary objective of this report is to encourage the EU to “chase convergence”: identify actionable spaces for cooperation in the implementation of GG projects in the Indo-Pacific region with like-minded partners who have robust networks and experience in development partnerships, and whose strategic interests align with those of the EU.

The Global Gateway and China's Belt and Road Initiative

The Global Gateway (GG) has often been discussed in relation to China's Belt and Road Initiative (BRI). Indeed, the BRI's expansive scope and influence have served as a key catalyst for the EU's recalibration of its global development engagement.²⁰ While the BRI has promoted massive infrastructure investment—often driven by state-owned enterprises and framed as part of China's geopolitical ascent—GG seeks to offer a “positive alternative,” grounded in transparent, sustainable, and rules-based cooperation. Both initiatives represent divergent visions for global connectivity: China's state-led, centrally branded model versus the EU's market-oriented and values-driven framework. Despite their differences, the GG implicitly responds to critiques of the BRI, including concerns over debt sustainability, lack of transparency, and environmental harm. By contrast, GG emphasizes partnerships based on mutual accountability, green transition, and democratic values, distinguishing itself through these normative aspirations.

The Global Gateway and the EU's “Like-Minded” Partners

Identifying synergies rather than competition between the EU's GG and initiatives by like-minded Indo-Pacific partners is crucial for ensuring strategic coherence and maximizing geopolitical impact. For countries like Japan, South Korea, Australia, Aotearoa New Zealand, and Taiwan,

²⁰ Jacob Mardell, *Lessons from China's Belt and Road Initiative: Strategic Pathways for the EU's Global Gateway*, Konrad-Adenauer-Stiftung, Multinational Development Policy Dialogue, March 27, 2025, <https://www.kas.de/en/web/mned-bruessel/laenderberichte/detail/-/content/lessons-from-china-s-belt-and-road-initiative-strategic-pathways-for-the-eu-s-global-gateway>.

countering Chinese influence and preserving the liberal international order constitute a critical strategic objective – one they share with the EU. Their respective infrastructure strategies, such as Japan's Partnership for Quality Infrastructure, South Korea's K-Silk Road, and Australia's Pacific initiatives, already reflect a values-driven approach aligned with GG's emphasis on transparency, sustainability, and the rule of law. By coordinating rather than duplicating efforts, these actors can pool financial resources, streamline standards, and offer compelling alternatives to the BRI, reinforcing their collective normative and strategic goals.

Secondly, when the GG is understood as a *relational* initiative situated in a broader ecosystem of global infrastructure efforts, the emphasis should not only be on competing with the BRI but also on complementing and filling gaps in development cooperation. This report addresses a key blind spot in current discourse by highlighting how GG can add value through constructive convergence with existing regional infrastructure initiatives.

1.4 – Methodology

Case selection

This report explores opportunities for convergence in the implementation of GG-branded projects with like-minded partners in the Indo-Pacific. It does so through an in-depth analysis of fieldwork findings from two GG beneficiary countries: Fiji and Vietnam. These two countries were selected using a *diverse case approach*,²¹ which aims to capture a fuller picture by selecting cases that differ along key dimensions while sharing some core characteristics. Both countries are long-standing EU partners in the Indo-Pacific, classified as middle-income and high human development states, making them well-positioned for horizontal partnerships. However, their connectivity needs differ substantially, allowing the report to capture variation in sectoral priorities and partnership modalities. This methodological choice enables broader insights into GG's implementation logic and flexibility. Additionally, it highlights the potential challenges in selecting the Indo-Pacific region as a unit of analysis, given its pronounced heterogeneity. The rationale for selecting potential co-investment and implementation partners is discussed in detail in Section 4.1.

Interviews

In preparing this report, the authors conducted two field research trips: one to Suva, Fiji, in March 2025 and another to Hanoi, Vietnam, in April 2025. Additional expert interviews were held in Seoul, South Korea (February 2025) and Tokyo, Japan (March 2025). Altogether, the project team conducted interviews with 48 informants to gather original insights into the design, implementation, and local perceptions of the GG initiative, as well as to identify potential avenues for co-investment and collaboration with non-EU partners. To protect the interests of participants classified as a vulnerable

21 Alexander L. George and Andrew Bennett, "Case Selection Techniques in Case Study Research: A Menu of Qualitative and Quantitative Options," *Political Research Quarterly* 61, no. 2 (February 2008): 294–308, <https://doi.org/10.1177/1065912907313077>

population, interviews are anonymized in a way that safeguards informants' interests while preserving sufficient contextual detail to ensure transparency and credibility.²² Interviewees included diplomats from the EU, its member states, the United States, Canada, Japan, the Republic of Korea, Australia, and Aotearoa New Zealand; development practitioners and policy experts from Fiji and Vietnam, including those affiliated with government-linked think tanks; Brussels-based EU officials; and representatives from relevant development finance institutions.

1.5 – Report Structure

The report proceeds as follows:

- Section II presents findings from the case of Fiji;
- Section III presents findings from the case of Vietnam;
- Section IV analyzes areas of convergence between the GG and infrastructure and connectivity initiatives of selected partners of the EU;
- Section V includes more specific policy recommendations for the GG.

22 Evi Schmid, Veerle Garrels, and Børge Skåland, "The Continuum of Rapport: Ethical Tensions in Qualitative Interviews with Vulnerable Participants," *Qualitative Research* 24, no. 5 (January 2024): 1253–1271, <https://doi.org/10.1177/14687941231224600>.

2. Case Study I: Fiji

2.1 – Country Profile

Recognizing its unique geographic, cultural, and socio-economic complexities, Fiji can be succinctly characterized as an upper-middle-income island state,²³ a regional hub in the South Pacific,²⁴ and a nation confronting the multifaceted challenges of climate vulnerability and socio-economic transformation.

Fiji has experienced notable economic growth over the past decade, driven by sectors such as tourism, agriculture, and mining.²⁵ Nevertheless, the country faces structural challenges, including disparities between urban and rural areas, limited institutional capacity, and the increasing burden of non-communicable diseases. Climate change remains an existential threat, manifesting through intensified cyclones, droughts, and rising sea levels that disproportionately impact its dispersed island communities.

Fiji's development trajectory is guided by its National Development Plan (NDP) 2025–2029, which emphasizes inclusive and resilient growth, poverty reduction, and the strengthening of infrastructure and social services. The government's role as a regional leader is also underscored by its active participation in multilateral forums addressing climate adaptation, disaster risk reduction, and ocean governance.²⁶

In its external relations, Fiji adopts a pragmatic approach to development cooperation, engaging a diverse set of partners, including traditional donors such as Australia, Aotearoa New Zealand, Japan, and the European Union, as well as the People's Republic of China.²⁷

2.2 – Connectivity in Fiji

In the context of Fiji, and alignment with the Fiji National Development Plan 2025–2029 and Vision 2050, connectivity encompasses not only the development of physical infrastructure but also broader societal integration. Addressing connectivity gaps is foundational for fulfilling Fiji's commitments to the Sustainable Development Goals (SDGs) and national objectives, particularly in promoting resilience, equity, and inclusive economic transformation.

23 World Bank, *Macro Poverty Outlook for Fiji*, April 2023, <https://documents1.worldbank.org/curated/en/099423404112334830/pdf/IDU0d4688ba2032ac04096082440e8effa96e3f0.pdf>.

24 European External Action Service, "EIB Global Opens Office in Fiji," press release, March 7, 2023, https://www.eeas.europa.eu/delegations/fiji/eib-global-opens-office-fiji_en.

25 World Bank, *Macro Poverty Outlook: Fiji*, April 2025, <https://thedocs.worldbank.org/en/doc/c6aceb75bed03729ef4ff9404dd7f125-0500012021/related/mpo-fiji.pdf>; Shania Shayal Prasad, "Mineral Sector Set for Growth," *FBC News*, April 23, 2024, <https://www.fbcnews.com.fj/news/mineral-sector-set-for-growth/>.

26 Fiji One News Team, "Fiji Strengthens Climate Resilience Through Global Partnerships," *Fiji One News*, April 30, 2025, <https://fijionenews.com.fj/fiji-strengthens-climate-resilience-through-global-partnerships/>.

27 Fiji One News, "Fiji Enters into \$300 M China BRI Deal," January 19, 2024, <https://fijionenews.com.fj/fiji-enters-into-300m-china-bri-deal/>; People's Republic of China Ministry of Foreign Affairs, "Joint Statement between the People's Republic of China and the Republic of Fiji," August 22, 2024, https://www.fmprc.gov.cn/eng/zy/gb/202408/t20240823_11478777.html.

Connectivity in this sense encompasses the enhancement of physical infrastructure (such as maritime transport, roads, and inter-island shipping routes), digital infrastructure (broadband internet and mobile networks), and institutional coordination across multiple levels of governance. A critical dimension is social connectivity—the integration of Fiji's geographically dispersed communities and ensuring equitable access to essential services, economic opportunities, and climate resilience measures.

Improved connectivity is crucial for enhancing disaster preparedness, bolstering transparent governance, and promoting the economic inclusion of remote or disadvantaged populations. Furthermore, it entails the strategic incorporation of isolated communities into national development efforts, especially in areas related to climate change adaptation and human mobility. Achieving this requires identifying and facilitating context-appropriate modes of engagement between communities, the state, and development partners.²⁸

Foreign development actors frequently highlight Fiji's prominent role in advancing human rights-based approaches to climate-induced relocations.²⁹ Moreover, the country is widely regarded as a regional leader in disaster risk reduction and emergency response, often serving as a model for neighboring Pacific Island states.³⁰ This leadership, however, exists alongside a set of persistent structural vulnerabilities that Fiji shares with other Small Island Developing States (SIDS).

From the perspective of foreign donors and development stakeholders, Fiji, like many of its regional counterparts, continues to grapple with core challenges such as geographic isolation, limited connectivity, and the small scale of domestic markets. These constraints hinder economic diversification and complicate sustained regional cooperation. Participation in regional and international forums, while essential for diplomatic visibility and access to global resources, is often financially burdensome and time-consuming, limiting the ability of Pacific governments to engage consistently.³¹

2.3 – Development Partners' Landscape

At the same time, donor assessments underscore that Pacific Island states, including Fiji, prioritize the maintenance of regional peace and stability and generally seek to avoid entanglement in broader geopolitical rivalries.³² Within this context, and in an increasingly competitive donor landscape marked by the active involvement of multiple international partners, recipient countries possess a wide array of options. This makes sustained collaboration, particularly with actors such as the European Union, contingent upon continued visibility, relevance, and trust-building within the region.³³

28 Food and Agriculture Organization of the United Nations, *Fiji National Development Plan 2025–2029 and Vision 2050*, FAOLEX document, 2024, <https://faolex.fao.org/docs/pdf/fij232617.pdf>.

29 EU diplomat in discussion with authors Suva, March 2025

30 Non-EU diplomat in discussion with authors Suva, March 2025

31 Non-EU diplomat in discussion with authors Suva, March 2025

32 Non-EU diplomat in discussion with authors Suva, March 2025

33 EU official in discussion with authors, March 2025

In the context of the European Union's Global Gateway Initiative, the primary institutional actors operating in Fiji are the European Investment Bank (EIB) and the European External Action Service (EEAS). Following the establishment of its regional office in Suva in 2023, co-located with the Delegation of the European Union for the Pacific, the EIB has assumed a broader mandate encompassing Fiji and 13 other Pacific Island countries.³⁴ As part of its regional engagement strategy, the EIB has entered strategic partnerships with multilateral actors such as the Asian Development Bank (ADB) and the Green Climate Fund (GCF). A notable outcome of this cooperation is the joint financing and implementation of the Viria Water Treatment Plant, announced in 2023.³⁵

Among the current flagship initiatives under the Global Gateway framework in Fiji is the planned construction of two hydropower facilities on the island of Viti Levu, specifically at Vatutokotoko and Qaliwana.³⁶ According to official EU sources, the project is expected to contribute to a 15 percent increase in the share of renewable energy on Viti Levu, Fiji's largest island, which is home to approximately 70 percent of the national population. In March 2023, the European Union and the European Investment Bank (EIB) completed feasibility studies and social and environmental impact assessments (SEIA) to support the decision-making process. These assessments were intended to equip Energy Fiji Limited (EFL) and relevant regulatory authorities with the necessary data to evaluate the project's viability and its implications.³⁷

International development cooperation in Fiji reflects a complex and evolving landscape shaped by diverse strategic interests, institutional priorities, and longstanding regional ties. Various external actors, ranging from multilateral agencies to bilateral donors, are engaged in multifaceted projects aimed at addressing the Pacific Island state's development challenges, particularly those related to climate change, public health, infrastructure, and socio-economic resilience.

In the domain of climate change adaptation and environmental governance, GIZ (*Deutsche Gesellschaft für Internationale Zusammenarbeit*; the German Agency for International Cooperation) maintains a comprehensive portfolio of initiatives in Fiji. Their programs seek to enhance local adaptive capacities, protect coastal and marine ecosystems,³⁸ prevent marine pollution,³⁹ and promote resilience through ecosystem-based and community-driven approaches.⁴⁰ Significantly, GIZ's interventions extend to the governance of human mobility linked to climate-induced displacement, aiming to integrate

34 European External Action Service, "EIB Global Opens Office in Fiji", March 7, 2023, https://www.eeas.europa.eu/delegations/fiji/eib-global-opens-office-fiji_en.

35 Reginald Chandar, "EIB Teams Up with ADB for Wastewater Project," *FijiLive*, March 12, 2025, <https://fijilive.com/eib-teams-up-with-adb-for-wastewater-project/>.

36 EU official in discussion with authors Suva, March 2025

37 European Commission, *Construction of Qaliwana and Vatutokotoko Hydro Power Plants in Viti Levu, Fiji*, n.d., accessed May 26, 2025. https://international-partnerships.ec.europa.eu/policies/global-gateway/construction-qaliwana-and-vatutokotoko-hydro-power-plants-viti-levu-fiji_en.

38 German Corporation for International Cooperation (GIZ) GmbH, *Strengthening Coastal Biodiversity Conservation and Management through Protection and Rehabilitation Incentives for Coastal Carbon Sinks in Pacific Island Countries*, 2023, <https://www.giz.de/en/worldwide/107397.html>.

39 German Corporation for International Cooperation (GIZ) GmbH, *Preventing Marine Litter in the Pacific Island Countries*, April 2025, <https://www.giz.de/en/worldwide/208195.html>.

40 German Corporation for International Cooperation (GIZ) GmbH, *The Pacific Islands Are Adapting to Climate Change*, December 2018, <https://www.giz.de/en/workingwithgiz/57747.html>.

migration considerations into broader climate adaptation strategies.⁴¹

The United Nations Development Program (UNDP) also plays a prominent role in Fiji's development landscape. In collaboration with UN Women, the Markets for Change initiative focuses on improving infrastructure and inclusivity in local marketplaces, with a particular emphasis on supporting women vendors.⁴² Complementing this, the Fiji Rural Electrification Fund (FREF) Support Project advances access to renewable energy in remote communities through the development of mini-grids and the enhancement of local institutional capacities.⁴³ UNDP's broader portfolio also includes the Maritime Security and Regional Development Project, which addresses critical gaps in maritime governance and security,⁴⁴ alongside ongoing initiatives in governance reform, women's participation,⁴⁵ and public health service delivery.⁴⁶

Despite the absence of formal diplomatic relations with Suva, Taiwan has maintained a continuous presence in Fiji's development sector since 1978. A key milestone in this relationship was the recent establishment of the Center for Agriculture Technology Transfer under the Taiwan Technical Mission (TTM), aimed at reviving the country's banana industry. This once-thriving export sector has been severely affected by climatic disruptions and plant disease. Taiwan's International Cooperation and Development Fund (ICDF) operates two missions in Fiji, focusing on resilient agricultural cultivation, aquaculture development, including the production of white shrimp larvae and the breeding of milkfish and groupers, as well as digital health infrastructure. The health initiative, launched in response to non-communicable diseases (NCDs) and COVID-19, involves the development of a patient tracking and case management system, along with accompanying operational guidelines.

Australia's development engagement is underscored by its investment in regional connectivity. Through the South Pacific Connect initiative—implemented in partnership with Fiji International Telecommunications, the Office of Posts and Telecommunications of French Polynesia, APTelecom, and the Vocus Group—Australia supports the construction of new international subsea cables linking Fiji and French Polynesia with Australia and the United States, thereby strengthening digital infrastructure and regional integration.⁴⁷

41 German Corporation for International Cooperation (GIZ) GmbH, *Improving Approaches to Human Mobility in the Context of Climate Change*, April 2024, <https://www.giz.de/en/worldwide/144279.html>.

42 United Nations Development Programme, *Markets for Change: Fiji, Solomon Islands and Vanuatu Project*, n.d., accessed May 30, 2025, <https://www.undp.org/pacific/projects/markets-change>.

43 United Nations Development Programme, *Fiji Rural Electrification Fund Support Project*, n.d. accessed May 29, 2025, <https://www.undp.org/pacific/projects/fiji-rural-electrification-fund-support-project>.

44 United Nations Development Programme, *Maritime Security and Regional Development in Fiji Project*, n.d., accessed May 28, 2025, <https://www.undp.org/pacific/projects/maritime-security-and-regional-development-fiji-project>.

45 UN Women Pacific Office, *Markets for Change (M4C) Project in Fiji, Solomon Islands, and Vanuatu*, n.d. accessed May 28, 2025, <https://www.undp.org/pacific/projects/markets-change>.

46 United Nations Development Programme, *UNDP and Fiji Ministry of Health and Medical Services Sign Finance Agreement to Combat HIV and TB in Fiji*, July 16, 2024, <https://www.undp.org/pacific/press-releases/undp-and-fiji-ministry-health-and-medical-services-sign-finance-agreement-combat-hiv-and-tb-fiji>.

47 Brian Quigley, "Connecting the South Pacific with New Subsea Cables," *Google Cloud Blog*, October 25, 2023, <https://cloud.google.com/blog/products/infrastructure/honomoana-and-tabua-subsea-cables-connect-south-pacific>. [blog.google+13cloud.google.com+13gcpweekly.com+13](https://www.blog.google+13cloud.google.com+13gcpweekly.com+13).

Japan mobilizes diverse stakeholders in its support for realizing Fiji's development needs. There is a sizable number of ODA projects, which emphasize inclusive economic and social development, climate resilience, and sustainable infrastructure.⁴⁸ Rooted in the National Development Plan (NDP) of Fiji and aligned with Japan's Free and Open Indo-Pacific vision, assistance focuses on three priority areas: infrastructure for economic growth (e.g., transport, energy, and maritime connectivity), climate change adaptation (including disaster risk reduction and renewable energy), and improved public services in education and health.⁴⁹ Support also extends to maritime safety, fisheries, and environmental protection. Japan recognizes Fiji's strategic role as a regional hub and works closely with other major donors to ensure coordination. Despite Fiji's middle-income status, Japan considers its vulnerabilities as a small island state and continues to offer grant-based assistance alongside concessional loans.

People-to-people exchanges, especially in tourism and education, are also a growing area of bilateral cooperation. In tandem with these technical efforts, Japan continues to emphasize people-to-people exchange and cultural outreach. As a high-level Japanese government official stated in an interview, Tokyo seeks to reassure its partners in the South Pacific region that, "You are not alone, and you are not forgotten."⁵⁰

There are also contributions from the Japanese private sector. In the energy private sector, a pilot hydrogen-powered generator project that has already demonstrated the feasibility of hydrogen transport, an innovative contribution to the Pacific's clean energy transition.⁵¹

Aotearoa New Zealand, for its part, prioritizes the resilience of health infrastructure, supporting the development of cyclone-resistant medical centers in response to deteriorating local health conditions. In parallel, Aotearoa New Zealand promotes the active engagement of civil society organizations and invests heavily in youth-oriented programming—a field in which Fiji demonstrates substantial capacity. Aotearoa New Zealand also provides climate financing directly to local governments, contingent upon project alignment with environmental objectives. However, the limited absorptive capacity of national ministries poses a recurring challenge, which Aotearoa New Zealand addresses through institutional capacity-building efforts.⁵²

Germany's participation through the GG initiative has thus far seen limited engagement from the private sector, with Volkswagen and VHL being notable exceptions. A recent roundtable focusing on agricultural machinery aimed to catalyze greater involvement; however, broader mobilization of German

48 Japan Ministry of Foreign Affairs, 対フィジー共和国 国別開発協力方針 [Country Assistance Policy towards the Republic of Fiji], April 2019, <https://www.mofa.go.jp/mofaj/gaiko/oda/files/000534904.pdf>.

49 Japan Ministry of Foreign Affairs, *Country Development Cooperation Policy for the Republic of Fiji*. Tokyo: MOFA, March 2018. <https://www.mofa.go.jp/mofaj/gaiko/oda/files/000072641.pdf>; Ministry of Foreign Affairs, *Rolling Plan for the Republic of Fiji*. Tokyo: MOFA, July 2023. <https://www.mofa.go.jp/mofaj/gaiko/oda/files/000534904.pdf>.

50 Non-EU diplomat in private discussion with authors Suva, March 2025.

51 Non-EU diplomat in discussion with authors Suva, March 2025; Obayashi Corporation, ニュージーランド産グリーン水素の海上輸送およびフィジーでの利活用の実証に成功 [Successfully Demonstrated Marine Transportation of Green Hydrogen Produced in New Zealand and Its Utilization in Fiji], January 28, 2025, https://www.obayashi.co.jp/news/detail/news20250128_1.html.

52 Non-EU diplomat in discussion with authors Suva, March 2025.

business remains an ongoing challenge.⁵³

Canada has shifted its development focus in the Pacific from large-scale infrastructure to investments in human capital and institutional resilience. This strategic reorientation prioritizes “software” over “hardware,” with an emphasis on gender equality as a pathway to poverty reduction. In this context, Canada has supported initiatives aligned with the Women, Peace, and Security (WPS) agenda, acknowledging Fiji’s regional leadership in peacebuilding and inclusive governance. Anticipatory planning for future climate-related relocations further underscores Canada’s commitment to socially adaptive and people-centered development.⁵⁴

The United States, meanwhile, has significantly scaled back its presence with the withdrawal of USAID from the region,⁵⁵ a move that donor stakeholders anticipate will have serious consequences for health-related programming. USAID had employed several hundred local personnel and played a key role in public health interventions, including HIV prevention efforts. While programs in security, law enforcement, and anti-drug efforts are likely to continue through alternative arrangements, the cessation of critical healthcare initiatives has prompted renewed expectations for the European Union and its Global Gateway initiative to step in and help mitigate the vacuum left by the U.S. departure.⁵⁶ In parallel, some European actors have increased their public health-sector engagement. For example, the 1.2 million EUR SHARE project funded by Agence Française de Développement (AFD) supports the Fiji National Public Health Laboratory in strengthening its surveillance capacity over arboviral threats.⁵⁷

During fieldwork, local stakeholders in Fiji, representing both the civil society and government entities in the broader ecosystem of development policy, consistently emphasized the importance of respecting the agency of local communities in project design and implementation. Simultaneously, they highlighted that efforts to maximize the project impact while conforming with complicated procedural requirements of donors, including the EU, create an impression that the local context is merely a secondary consideration. They called for more careful integration of the needs and perspectives of local communities into project planning and implementation⁵⁸.

This is particularly crucial for deliberations regarding land use. Fiji boasts complex land ownership structures, which are deeply rooted in customary tenure systems and governed by intricate local dynamics. Failure to account for these sociocultural and legal dimensions can generate significant resistance and compromise project outcomes.⁵⁹ A salient example is the recent Wainikoroiluva Hydropower Project, implemented by Energy Fiji

53 EU official in discussion with authors Suva, March 2025.

54 Non-EU diplomat in discussion with authors Suva, March 2025.

55 Non-EU diplomat in discussion with authors Suva, March 2025.

56 EU official in discussion with authors Suva, March 2025.

57 Fiji One News, “Fiji SHARE Project Strengthens Public Health Surveillance in Fiji with French Support,” *Fiji One News*, February 21, 2025, <https://fijionenews.com.fj/fiji-share-project-strengthens-public-health-surveillance-in-fiji-with-french-support/>

58 Local stakeholder, EU official, non-EU officials in discussion with authors Suva, March 2025.

59 Local stakeholder in discussion with authors Suva, March 2025.

Limited in collaboration with the Australian High Commission.⁶⁰ The project has faced sustained opposition from local communities, who have expressed concerns about its potential adverse effects on their cultural heritage, environmental integrity, and traditional livelihoods. This case highlights the crucial importance of conducting comprehensive community consultations and engaging with stakeholders in a manner that is both transparent and culturally sensitive. The failure to adequately address these contextual factors at the outset of a project often results in irreversible consequences. Once community trust is eroded or a culturally sensitive issue is mishandled, opportunities for constructive engagement may be lost. In such cases, retrospective mitigation efforts are seldom sufficient to restore legitimacy or ensure project viability.

2.4 – Opportunities for the EU's infrastructure and connectivity cooperation with Fiji:

• Sustainable Infrastructure Development and Renewable Energy Cooperation

Through the implementation of the GG initiative, the EU is well-positioned to facilitate Fiji's quest for low-carbon, climate-resilient infrastructure, with particular emphasis on transport, energy, and water management systems. Given the Pacific country's acute vulnerability to climate change and recurrent natural disasters, infrastructure interventions that incorporate resilience standards are likely to generate sustained developmental and humanitarian dividends. In parallel, joint investments in solar, wind, and biomass energy directly advance Fiji's objective of achieving 100 percent renewable electricity generation by 2030. Leveraging the European Investment Bank's financing mechanisms, alongside EU technical expertise, offers a pathway to accelerate implementation while enabling substantive technology transfer.

• Digital Connectivity, ICT Capacity, and Governance Frameworks

Strategic investment in submarine cable systems, broadband expansion, and digital skills development enhances Fiji's integration into regional and global digital ecosystems, aligning both with the EU's digital agenda and with the ambitions articulated in Fiji's Digital Government Transformation Program. Concurrently, the enhancement of institutional capacity for project planning, procurement, and maintenance fortifies the sustainability of infrastructure investments over the long term. This trajectory necessitates technical assistance in regulatory reform and the establishment of robust public-private partnership frameworks, thereby ensuring that governance mechanisms evolve in tandem with infrastructural modernization.

• Maritime Trade Linkages and Regional Integration

The modernization of ports, inter-island shipping infrastructure, and customs systems consolidates Fiji's role as a maritime hub within the South Pacific,

⁶⁰ Sosiveta Korobiau, "Navunikabi Villagers Protest Hydro Dam Project," *Fiji Sun*, March 30, 2025, <https://fijisun.com.fj/2025/03/30/navunikabi-villagers-protest-hydro-dam-project/>.

facilitating intra-regional trade within the Pacific Islands Forum framework as well as external trade linkages. The EU's experience in designing international transport corridors offers a transferable model for multi-island connectivity in the Pacific context. Embedding such cooperation within broader Pacific–EU dialogues—particularly through mechanisms such as the EU–Pacific Green–Blue Alliance and the successor agreements to the Cotonou Partnership—ensures congruence with regional development strategies and the SDGs, while also institutionalizing Fiji's integration into multilateral connectivity platforms.

Challenges to the EU's infrastructure and connectivity cooperation with Fiji:

• Navigating a Highly Competitive Development Environment

In the context of an increasingly competitive development landscape, Pacific Island countries are engaging with a wide range of international partners, each offering distinct modalities of assistance. This multiplicity of options renders cooperation with the EU far from assured. Consequently, the EU must sustain a high degree of visibility, demonstrate contextual relevance, and cultivate trust to remain a preferred partner in the region.⁶¹

• Procedural and Institutional Barriers to Effective Engagement

However, one of the structural impediments to deeper EU-Pacific cooperation lies in the procedural complexity associated with European development instruments. Many Pacific Island states, including Fiji, operate with limited institutional capacity, particularly within their respective line ministries, which often lack the capacity that is required to access EU grants or navigate broader mechanisms such as the Green Climate Fund (GCF) under the UNFCCC framework.⁶² Extensive bureaucratic requirements, manifested in the form of protracted proposal and reporting processes, constitute significant barriers to entry and hinder the capacity of Pacific governments to mobilize available resources effectively.

While communities throughout the Pacific are recognized for their endurance and adaptability, there exists a simultaneous imperative for international partnerships to deliver measurable and timely results.⁶³

• Competitive Advantage of China's Development Model

In contrast, the People's Republic of China (PRC) is increasingly viewed by local stakeholders as a responsive and pragmatic development partner. Chinese development cooperation is generally characterized by streamlined procedures and direct engagement with local communities, often channeled through traditional structures⁶⁴ such as the Great Council of Chiefs (Bose Levu

61 EU official in discussion with authors Suva, March, 2025.

62 EU official in discussion with authors Suva, March, 2025.

63 EU official in discussion with authors Suva, March, 2025.

64 HsiaoLan Lin, "More than a 'Petty Chief': Understanding Fijian Chiefship through the Entrance Ceremony and Local History," *Anthropologica* 61, no. 2 (December 2019): 213–26, <https://doi.org/10.3138/anth.2018-0016>

Vakaturaga)⁶⁵ rather than solely through formal government institutions. This approach has allowed for the relatively rapid implementation of infrastructure and service delivery projects, reinforcing perceptions of China as a capable and accessible donor.⁶⁶

• Consequences of USAID's Withdrawal from the Region

Compounding these dynamics is the recent withdrawal of the United States Agency for International Development (USAID) from the Pacific region, a development widely anticipated to have significant repercussions, particularly in the domain of public health. USAID's departure entailed the termination of programs that had employed several hundred local personnel and supported critical interventions such as HIV prevention and treatment. While programming in areas such as security sector reform, police cooperation, and narcotics control is expected to persist through alternative arrangements, the discontinuation of key healthcare initiatives has raised concern among both domestic stakeholders and the broader donor community.⁶⁷ Consequently, amid this shifting aid architecture, heightened expectations have been placed on EU and its GG initiative to address the resultant void. The EU's capacity to effectively respond to this challenge will significantly impact its credibility and influence within the region. Moreover, it might shape the future trajectory of its development engagement across the Pacific.⁶⁸

65 Lice Movono and Nick Sas, "Banned for Almost Two Decades, Fiji's Great Council of Chiefs Is Back and Pushing for Greater Influence," *ABC News*, March 3, 2024, <https://www.abc.net.au/news/2024-03-04/fiji-great-council-chiefs-pacific-traditional-leaders/103532502>.

66 EU official and non-EU diplomat in discussion with authors Suva, March 2025.

67 EU official in discussion with authors Suva, March 2025

68 EU official in discussion with authors Suva, March 2025

3. Case Study II: Vietnam

3.1 – Country Profile

With due respect to its diversity and complexity, Vietnam has been described as a lower-middle-income country, a “development success story,”⁶⁹ a middle power in Asia,⁷⁰ and in classified as a closed autocracy.⁷¹

Vietnam has set an ambitious target of achieving high-income status by the time the nation celebrates its centennial in 2045. Beyond economic aspirations, political considerations underpin this objective in light of the Communist Party of Vietnam’s quest for legitimacy and regime survival.⁷² Consequently, “sustaining economic growth is an utmost priority for Vietnam”⁷³ and a key consideration behind bilateral and multilateral infrastructure and connectivity cooperation projects.

Survival also underpins Hanoi’s external action. With the Association of Southeast Asian Nations (ASEAN), Vietnam demonstrates “sectoral leadership” in its management of the South China Sea disputes, sustaining Cambodia’s and Laos’ engagement within the body as well as upholding the relevance of ASEAN as a regional security actor.⁷⁴ In the spirit of its “bamboo diplomacy” (ngoại giao cây tre), Vietnam pursues a pragmatic geopolitical balancing act as it maintains development cooperation partnerships with Europe and the United States on one hand, and China and Russia on the other hand.⁷⁵ Consequently, despite the normative gap, there are ample opportunities for the EU to enhance its economic and development cooperation with Hanoi.

3.2 – Connectivity in Vietnam

Most concisely, connectivity in the Vietnamese context is first and foremost a networking tool for realizing national development objectives. Vietnam has set an ambitious target of achieving high-income status by the time the nation celebrates its centennial in 2045.⁷⁶ Local stakeholders emphasize different dimensions of connectivity-building initiatives, which they find

69 World Bank, *Country Overview: Vietnam*, May 9, 2025, <https://www.worldbank.org/en/country/vietnam/overview>.

70 Lowy Institute, *Asia Power Index – Vietnam Country Profile*, n.d., accessed June 10, 2025, <https://power.lowyinstitute.org/countries/vietnam/>.

71 Marina Nord et al., *Democracy Report 2025: 25 Years of Autocratization – Democracy Trumped?* (University of Gothenburg: V-Dem Institute, March 2025), https://www.v-dem.net/documents/61/v-dem-dr_2025_lowres_v2.pdf.

72 For theoretical and empirical underpinnings of this argument, Matthew Wilson and David Andersen, “Economic Growth, Largest-Party Vote Shares, and Electoral Authoritarianism,” *Electoral Studies* 92 (December 2024): Article 102879, <https://doi.org/10.1016/j.electstud.2024.102879>.

73 Local stakeholder in discussion with authors Hanoi, April 2025.

74 Ralf Emmers and Huong Le Thu, “Vietnam and the Search for Security Leadership in ASEAN,” *Asian Security*, no. 17 (June 2020): 64–78, <https://doi.org/10.1080/14799855.2020.1769068>.

75 Jasper Roctus, “Vietnam’s Bamboo Diplomacy: Between Beijing’s Persistent Shadow and Growing Western Ties,” *Egmont Institute*, November 5, 2024, <https://www.egmontinstitute.be/vietnams-bamboo-diplomacy-between-beijings-persistent-shadow-and-growing-western-ties/>.

76 “Vietnam to Escape Middle-Income Trap with Sustained High Growth through 2045: PM,” *Hanoi Times*, February 21, 2025, <https://hanoitimes.vn/vietnam-to-escape-middle-income-trap-with-sustained-high-growth-through-2045-pm.642332.html>.

conducive to realizing this overarching development objective.⁷⁷

These include balancing projects that foster *hard* and *soft* connectivity, *infrastructure* and *regulatory* connectivity, and *geographically equitable* connectivity, which countervail projects in the already well-developed North-South corridor with new East-West initiatives enhancing connectivity with Vietnam's Central Highlands and mainland Southeast Asia. Any connectivity-related project can be assessed along any or all of the three axes.

Vietnam's appetite for energy is increasingly voracious with each passing day—consequently, projects that address the issue of rapidly growing energy demand are key to the nation's development. Enhancing energy connectivity thus remains a critical objective.

The Vietnamese leadership recognizes and prioritizes this need. On April 15, 2025, Deputy Prime Minister Bui Thanh Son signed Decision No. 768/QĐ-TTg ("Decision 768") approving the adjustment to the National Power Development Plan for the 2021-2030 period, with a vision to 2050 (PDP8).⁷⁸ It introduces novel key elements of the nation's energy development strategy: boosting renewable energy capacity, introducing nuclear power, and expanding domestic and regional (intra-ASEAN) energy connectivity. With increased investment incentives and integration of cross-border infrastructure, the plan aims to enhance energy security while accelerating the country's transition to clean energy, particularly through partnerships with Laos and China⁷⁹ for electricity imports and, in the future, harnessing Vietnam's renewables capacity for exports to Malaysia and Singapore.⁸⁰ Energy connectivity is also a vital component of the National Green Growth Strategy for 2021-2030, vision towards 2050, which recognizes climate change mitigation as a prerequisite for sustaining economic growth.⁸¹ Accordingly, it overtly calls for strengthening smart energy connectivity to reduce power loss and raise the efficiency in electricity usage.

By extension, experts have also emphasized the importance of energy connectivity as a catalyst for integrating key infrastructure sectors, including transportation and digital systems.⁸² Interviews with local stakeholders and a review of documents produced by the government of Vietnam indicate a robust framework of initiatives aimed at bolstering Vietnam's involvement in intra-regional energy connectivity initiatives within ASEAN. This is consistent with the ASEAN Plan of Action for Energy Cooperation Phase II, defined

77 Local stakeholders in discussion with authors Hanoi, April 2025.

78 VietnamPlus, "Vietnam Eyes \$18 Billion USD a Year for Power Plan through 2035," May 2, 2025, <https://en.vietnamplus.vn/vietnam-eyes-18-billion-usd-a-year-for-power-plan-through-2035-post318507.vnp>.

79 Tian Shenyujia, "China Resumes Cross-Border Electricity Sales to Vietnam through Guangxi Channel," *Belt and Road Portal*, May 25, 2023, <https://eng.yidaiyilu.gov.cn/p/320260.html>.

80 Shannon Tech and Lu Wei Hong, "Deal to Explore Exporting Renewable Energy from Vietnam to Singapore, Malaysia Inked at ASEAN Summit," *The Straits Times*, May 26, 2025, <https://www.straitstimes.com/asia/se-asia/companies-ink-deal-to-export-renewable-energy-from-vietnam-to-malaysia-singapore-at-asean-summit>; Văn Nguyễn, "Vietnam, Malaysia, Singapore Reached Agreement on Renewable Energy Cooperation," *Vietnam Economic Times*, May 27, 2025, <https://en.vneconomy.vn/vietnam-malaysia-singapore-reached-agreement-on-renewable-energy-cooperation.htm>.

81 Vietnam Government Portal, "National Green Growth Strategy for 2021-2030, Vision Towards 2050," October 19, 2021, <https://en.baohinhphu.vn/national-green-growth-strategy-for-2021-2030-vision-towards-2050-11142515.htm>.

82 Local stakeholder in discussion with authors Hanoi, April 2025.

for the period from 2021 through 2025.⁸³ Laos has positioned itself as a firm partner in these endeavors – in late April 2025, the landlocked country broke ground on a new hydroelectric plant project to support green energy exports to Vietnam.⁸⁴

Other pivotal areas of connectivity-building work in Vietnam include transportation, digital, and regulatory connectivity.

The country continues to pursue an export-led growth strategy; therefore, improving the efficiency and reliability of its transport infrastructure is crucial to enhance trade competitiveness and facilitate integration into global value chains. A 2020 report by the World Bank identified the “fragmented state of connectivity” as an obstacle to Vietnam’s further integration in both global and domestic markets.⁸⁵ Similar to efforts aimed at enhancing energy connectivity, Vietnam should recognize the strengthening of domestic and intra-regional transportation infrastructure as a key tool in facilitating its economic growth and achieving high-income economy status by 2045.

Findings from fieldwork conducted in Hanoi in 2025 suggest growing awareness of this gap among government stakeholders and the local SME community. A local stakeholder stated in an interview that “Vietnam’s long coastline is a source of tremendous opportunity for economic growth of [the] country and [its] neighbors,” and identified East-West transportation connectivity – which would also facilitate the realization of the full potential of Vietnamese ports on the East China Sea coast – as a discernible blindspot of Hanoi’s development policy.⁸⁶ Another expert underscored the missed opportunities to elevate seaports in Vung Tau and Vung Ang as export gateways for the broader mainland Southeast Asian region due to difficulties in access and egress to these maritime facilities.⁸⁷

The government appears to be gradually addressing this gap through new development strategies and partnerships with third countries. The National Railway Development for 2021-2030 stipulates that four of nine new railway lines will be linked to seaports and foresees the construction of two new lines to the Vietnam-Laos border.⁸⁸ Additionally, it supports the construction of two high-speed railway (HSR) lines in the North-South corridor (linking the capital city of Hanoi with Ho Chi Minh City, the nation’s economic hub) and another from Lào Cai (which borders China’s Yunnan Province) to Hải Phòng, the principal port city. At the time of compilation of this report, the groundbreaking of the latter HSR line, a flagship project of Vietnam-China

83 ASEAN Centre for Energy, *ASEAN Plan of Action for Energy Cooperation (APAEC) 2016–2025: Phase II (2021–2025)*, n.d., accessed April 17, 2025, <https://asean.org/wp-content/uploads/2023/04/ASEAN-Plan-of-Action-for-Energy-Cooperation-APAEC-2016-2025-Phase-II-2021-2025.pdf>.

84 Lao News Agency, “Laos Breaks Ground on \$360 Million Hydropower Project for Vietnam Export,” April 30, 2025, <https://kpl.gov.la/en/detail.aspx?id=91068>.

85 Duc Minh Pham et al., *Vietnam: Connecting Value Chains for Trade Competitiveness* (Washington, DC: World Bank, December 2019), <https://documents1.worldbank.org/curated/en/338961578925176972/pdf/Vietnam-Connecting-Value-Chains-for-Trade-Competitiveness.pdf>.

86 Local stakeholder in discussion with authors Hanoi, April 2025.

87 Local stakeholder in discussion with authors Hanoi, April 2025.

88 Vietnam Government Portal, *Quyết định số 1769/QĐ-TTg phê duyệt quy hoạch mạng lưới đường sắt giai đoạn 2021–2030, tầm nhìn đến 2050* [Decision No. 1769/QĐ-TTg: Approval of the Railway Network Planning for the Period 2021–2030, Vision to 2050], October 19, 2021, <https://vanban.chinhphu.vn/default.aspx?pageid=27160&docid=204311>.

connectivity, is scheduled for December 2025.⁸⁹

Digital connectivity arguably comprises the most significant set of initiatives aimed at boosting Vietnam's soft connectivity. In 2020, then-Prime Minister Nguyễn Xuân Phúc issued Decision No. 2289 approving the National Strategy on the Fourth Industrial Revolution towards 2030⁹⁰ and, in partnership with the World Economic Forum, launched the Center for the Fourth Industrial Revolution (C4IR) in 2024.⁹¹ A Hanoi-based expert emphasized that "[the government] puts a lot of emphasis on digital transformation," which is not only a driver of economic growth but also "increasingly a national security concern" and therefore "an area of cooperation which the EU should consider more."⁹² The expert positively referenced Poland as a potential contributor to these efforts under the aegis of a "Team Europe" approach, highlighting Polish Deputy Defense Minister Paweł Bejda's visit to Hanoi in March 2025, during which he discussed potential cooperation in cybersecurity and military communication technologies.⁹³ Another expert emphasized that Vietnam's undersea cables suffer from costly outages and faults, and advocated closer cooperation between the EU and Vietnam on physical digital infrastructure.⁹⁴

The final dimension, regulatory connectivity, is arguably most elusive as it lacks a physical component. It can be understood as a set of efforts to promote and harmonize good regulatory practices. By extension, these efforts can be viewed as an interposition between ideation and the realization of tangible policy objectives, such as sustained economic growth in the case of Vietnam. It can diminish non-tariff barriers to economic interactions, improve regulatory quality, and bring about other benefits such as geopolitical gains.⁹⁵ In December 2024, Vietnam launched major political reforms, streamlining its state institutions,⁹⁶ consolidating local governments,⁹⁷ and reforming its Communist Party (CPV), to boost governance and growth. These momentous reforms, which involve accelerating institutional reforms and updating legal frameworks, aim to enhance economic resilience, drive economic growth, and attract foreign investment. An expert highlighted the potential of cooperation with the EU in reforming the financial regulatory system⁹⁸, positively referencing the existing initiatives, including the

89 VietnamPlus "PM Sets December 19 Launch Date for Lao Cai – Hanoi – Hai Phong Railway," May 20, 2025, <https://en.vietnamplus.vn/pm-sets-december-19-launch-date-for-lao-cai-hanoi-hai-phong-railway-post319560.vnp>.

90 Vietnam Government Portal, *National Strategy for the 4th Industrial Revolution towards 2030*, January 26, 2021, <https://en.baohinhphu.vn/national-strategy-for-4th-industrial-revolution-11140283.htm>

91 Socialist Republic of Vietnam Ministry of Science and Technology, *Vietnam Launches Center for Fourth Industrial Revolution*, September 26, 2024, <https://english.mst.gov.vn/viet-nam-launches-center-for-fourth-industrial-revolution-197240926103404868.htm>.

92 Local stakeholder in discussion with authors Hanoi, April 2025.

93 Republic of Poland Ministry of National Defense, *Wizyta Wiceministra Obrony Narodowej RP Pawła Bejdy w Wietnamie* [Visit of Deputy Minister of National Defense Paweł Bejda to Vietnam], March 26, 2025, <https://www.gov.pl/web/wietnam/wizyta-wiceministra-obrony-narodowej-rp-pawla-bejdy-w-wietnamie>.

94 Local stakeholder in discussion with authors Hanoi, April 2025.

95 Derek Gill, *Asia and Europe Regulatory Connectivity and Coherence* (Wellington: New Zealand Institute of Economic Research, August 3, 2016), <https://www.nzier.org.nz/publications/asia-and-europe-regulatory-connectivity-and-coherence>.

96 Phan Xuan Dung, "Vietnam's Era of 'National Rise': Great Expectations," *Fulcrum*, January 31, 2025, <https://fulcrum.sg/vietnams-era-of-national-rise-great-expectations/>.

97 Le Hong Hiep, "Vietnam's New Revolution: Will Provincial Mergers Bring Disruptions or Opportunities?" *Fulcrum*, April 22, 2025, <https://fulcrum.sg/vietnams-new-revolution-will-provincial-mergers-bring-disruptions-or-opportunities/>.

98 Interview with a local stakeholder in Hanoi, April 2025.

Enhancing Economic Governance in Vietnam (EEGP) program.⁹⁹ Regulatory connectivity projects can complement the domestic efforts by helping Vietnam align its policies with international standards.

3.3 – Global Gateway in Vietnam

Vietnam currently houses one GG flagship project and is involved in one regional flagship project.¹⁰⁰ The initiative supports the Just Energy Transition Partnership (JETP) in Vietnam, which includes the construction of Bắc Ái hydropower pump storage (1,200 MW), the construction of the Trà Vinh 48 MW nearshore wind farm, and the upgrading of the Hydropower plant Tri An by 200 MW. The regional transportation flagship initiative centers on the rehabilitation of National Road 2 in Laos – a section of the intra-regional, cross-national Asian Highway 13 and a main transport corridor connecting the Lao PDR with its neighbors, Vietnam and Thailand.¹⁰¹

The focus on energy-related projects is consistent with Vietnam's connectivity objectives, as described in the previous section, and the fact that most GG flagship projects have relevance to energy and climate infrastructure. The JETP initiative, established by the International Partners Group (IPG) in 2022¹⁰², supports three primary targets:

1. Accelerate and cap the peaking of greenhouse gas emissions from the power sector at 170 million tons of CO₂ equivalent by 2030;
2. Limit the installed capacity of coal-fired power plants to 30.2 gigawatts by 2030;
3. Increase the share of renewable energy in the power mix to 47 percent by 2030, promoting investments in wind, solar, and other clean energy sources.

JETPs are also being implemented to support the energy transitions in South Africa, Indonesia, and Senegal. In Vietnam, the partnership is co-led by the EU and the United Kingdom.

An EU official labeled the Bắc Ái component of JETP as “a model for the Team Europe approach.”¹⁰³ The EU has worked together with member states, including AFD, the French implementing agency, and KfW, Germany's public development bank, as well as the EIB, to pool their resources and expertise. Additionally, the implementation of the project is an example of a “360 degree approach,” which seeks to extend the impact of GG ventures beyond infrastructure to human capital development, skills building, and –

⁹⁹ European External Action Service, *Enhancing Economic Governance in Vietnam (EEGP)*, December 27, 2023, https://www.eeas.europa.eu/projects-eeep_en?s=184.

¹⁰⁰ European Commission, *EU-Asia and the Pacific Flagship Projects*, January 2025, https://international-partnerships.ec.europa.eu/document/download/90a126e5-5f6a-48d2-8aba-43a4b5e25ac6_en?filename=infographics-global-gateway-flagship-projects-2025-eu-asia-pacific_en.pdf.

¹⁰¹ European Commission, *Rehabilitation of the Lao National Road 2*, February 2024, https://international-partnerships.ec.europa.eu/document/download/ae255215-2f8f-4c33-a5d9-bfd5824acc88_en?filename=EU-Laos-national-road.pdf.

¹⁰² The IPG behind JETP consists of the European Union, the United Kingdom of Great Britain and Northern Ireland, the United States of America, Japan, the Federal Republic of Germany, the Republic of France, the Italian Republic, Canada, the Kingdom of Denmark, and the Kingdom of Norway. See European Commission, “Political Declaration on Establishing the Just Energy Transition Partnership with Viet Nam,” September 15, 2022, https://ec.europa.eu/commission/presscorner/detail/es/statement_22_7724.

¹⁰³ EU official in discussion with authors, April 2025.

in this specific case – policy dialogue in the energy sector, which includes the support for regulatory reforms. An essential dimension of this work targets Vietnam Electricity (EVN), Vietnam's national power company, to build their capacity in managing public-private partnerships.¹⁰⁴ This approach enables the EU to address simultaneously the needs related to energy connectivity and regulatory connectivity. A Vietnamese expert applauded this multi-prong approach, recognizing that “beyond construction, Europe can share its sorely needed technical expertise and best practices for project management.”¹⁰⁵

Additionally, the construction of Bắc Ái hydropower pump storage is a unique example of cooperation between the EU and Japan under the aegis of the GG.¹⁰⁶ The Japan International Cooperation Agency is one of six IPG Development Finance Institutions, beyond five European ones (AFD, EIB, KfW, CDP, Proparco). Together, the six partners will contribute up to €480 million to EVN for long-term financing of the Bắc Ái facility.¹⁰⁷

3.4 – Opportunities and Challenges for Engagement with the EU

Based on the presented country profile, conceptualization, and contextualization of connectivity in Vietnam, as well as an analysis of the current state of play regarding GG implementation in the country, a clear set of opportunities and challenges for the initiative emerges.

Opportunities for the EU's infrastructure and connectivity cooperation with Vietnam:

- **Hanoi Recognizes the Importance of Green Transition**
Vietnam's ambitious green growth agenda offers a significant opening for EU engagement. The approval of PDP8 and participation in the Just Energy Transition Partnership (JETP) underscore Hanoi's political commitment to decarbonization. Vietnam has outlined specific goals—like capping coal, expanding renewables, and boosting energy efficiency—which align well with EU priorities. The EU's strong technical expertise and leadership in green finance, regulation, and clean tech solutions make it a natural partner for supporting Vietnam's pathway to climate neutrality and energy resilience.
- **Receptiveness to the 360 Degree Approach, Including Regulatory Connectivity**
Vietnam's interest in not just infrastructure, but also associated regulatory reforms, presents a key opportunity for EU involvement. The JETP's implementation emphasizes human capital development, public-private partnerships, and policy dialogue—areas in which the EU excels. For example, EVN is actively working with Team Europe to strengthen

¹⁰⁴ EU official in discussion with authors, April 2025.

¹⁰⁵ Local stakeholder in discussion with authors Hanoi, April 2025.

¹⁰⁶ Non-EU official in discussion with authors Brussels, May 2025.

¹⁰⁷ European External Action Service, “EU and UK Welcome Viet Nam JETP Progress on Occasion of President Macron's Visit,” press release, May 29, 2025, https://www.eeas.europa.eu/jetp-may2025-pr_en.

its management capabilities.¹⁰⁸ Consequently, local stakeholders are expected to be relatively receptive to the “360-degree” approach, which, in turn, should allow the EU to simultaneously advance energy, regulatory, and digital connectivity, addressing both hardware and governance aspects of development.

- **Explicitly Defined Connectivity Needs**
Vietnam’s clearly articulated connectivity strategy—emphasizing energy, transportation, digital, and regulatory integration—creates predictable and commercially relevant entry points for EU actors. The government’s focus on East–West corridors, smart grids, and port-rail links directly addresses trade and logistics bottlenecks. Projects like the high-speed rail connections between its external borders and seaports, as well as smart energy systems, directly support Vietnam’s export-led growth model. EU investments that align with these priorities are more likely to secure local buy-in, benefit from co-financing, and generate long-term economic returns.

Challenges to the EU’s infrastructure and connectivity cooperation with Vietnam:

- **Competition with China and Russia**
Vietnam’s pursuit of “bamboo diplomacy” pushes it to expand infrastructure and connectivity cooperation with China and Russia, which complicates the EU’s engagement. Beijing – the EU’s systemic rival – and Hanoi explicitly mention bolstering connectivity as an essential objective of their cooperation¹⁰⁹, including projects across energy¹¹⁰, transport (e.g. Lào Cai–Hải Phòng HSR)¹¹¹, and digital sectors¹¹², which overlap with EU priorities. Simultaneously, Vietnam is advancing nuclear energy negotiations with Russia¹¹³, reviving stalled reactor projects, and signing long-term agreements for research, fuel, and training. These developments underscore the geopolitical competition the EU faces in offering credible alternatives aligned with democratic norms and “dual transition” (green and just transition) standards.

108 Nhan Dan Online, “EU, France to Continue Support for Viet Nam’s Green Energy Transition,” May 14, 2025, <https://en.nhandan.vn/eu-france-to-continue-support-for-viet-nams-green-energy-transition-post148004.html>.

109 Xinhua, “Xi Urges China, Vietnam to Step Up Connectivity, New Quality Productive Forces Cooperation,” January 16, 2025, http://en.cppcc.gov.cn/2025-01/16/c_1064823.htm; Miyeon Oh, “U.S.–China Rivalry and Digital Connectivity in the Indo-Pacific,” *Global Asia*, December 2024, https://www.globalasia.org/v16no4/cover/us-china-rivalry-and-digital-connectivity-in-the-indo-pacific_miyeon-oh.

110 Linjie Bao and Diego Montero, “A Little Help from My Friends: Chinese Clean Energy Investments in Vietnam,” *New Security Beat* (blog), December 19, 2024, <https://www.newsecuritybeat.org/2024/12/a-little-help-from-my-friends-chinese-clean-energy-investments-in-vietnam/>.

111 Vân Nguyễn, “Construction of Lào Cai–Hanoi–Hai Phòng Railway Scheduled to Start on December 19,” *Vietnam Economic Times* (VnEconomy), May 21, 2025, <https://en.vneconomy.vn/construction-of-lao-cai-hanoi-hai-phong-railway-scheduled-to-start-in-december-19.htm>.

112 Socialist Republic of Vietnam Ministry of Science and Technology Vietnam, “Vietnam Proposes Joint Working Group with China on Digital Cooperation,” December 4, 2024, <https://english.mst.gov.vn/vietnam-proposes-joint-working-group-with-china-on-digital-cooperation-19724120414445714.htm>; Article 19, “China: Southeast Asia Visit Raises Alarm over Digital Repression,” April 14, 2025, <https://www.article19.org/resources/china-southeast-asia-visit-raises-alarm-over-digital-repression/>.

113 Huy Anh, “Vietnam Eyes Further Cooperation with Russian Nuclear Power Enterprise,” *Hanoi Times*, June 20, 2024, <https://hanoitimes.vn/vietnam-eyes-further-cooperation-with-russian-nuclear-power-enterprise-327169.html>; Reuters, “Vietnam, Russia Agree to Quickly Sign Nuclear Power Plant Deal,” May 12, 2025, <https://www.reuters.com/business/energy/vietnam-russia-agree-quickly-sign-nuclear-power-plant-deal-2025-05-12/>.

- Investment inefficiency
Vietnam suffers from systemic investment inefficiency, particularly in the transport sector. Numerous infrastructure projects are approved due to political pressure rather than economic viability.¹¹⁴ Inflated costs and weak project selection processes mean that capital is not being effectively translated into meaningful infrastructure upgrades. For the EU, which emphasizes transparency, cost efficiency, and impact under the GG, this presents a fundamental challenge to ensuring that its investments deliver long-term, sustainable returns.
- “Just” Transition under Hanoi’s Authoritarian Rule
Vietnam’s authoritarian governance undermines the “just” in just energy transition. The arrest of six environmental and civil society leaders (the “Vietnam Six”) since 2022 has silenced critical voices and eroded consultation mechanisms promised under the JETP.¹¹⁵ It also compromises the vision for more inclusive impact assessment, implementation, and evaluation mechanisms that meaningfully include civil society organizations, as Commissioner Sikela promised in his confirmation hearing.¹¹⁶ This top-down transition also risks excluding women and minorities, lacks gender-sensitive planning, and prioritizes price controls over participatory justice.¹¹⁷ For the EU, whose GG commitments include inclusive development and civic engagement, these political constraints severely limit the accountability and social legitimacy of joint green initiatives.

114 Nguyen Xuan Thanh and David Dapice, *Vietnam’s Infrastructure Constraints: Public Investments and Public-Private Partnerships*, Policy Dialogue Paper no. 3, UNDP–Harvard Policy Dialogue Papers Series (Cambridge, MA: Harvard Kennedy School, February 2024), https://ash.harvard.edu/wp-content/uploads/2024/02/vietnams_infrastructure_constraints.pdf.

115 Ben Swanton, *Weaponizing the Law to Prosecute the Vietnam Four*, Project 88, April 6, 2023, <https://the88project.org/wp-content/uploads/2023/04/Weaponizing-the-law-report-Project-88-ENG.pdf>, facebook.com+8the88project.org+8the88project.org+8

116 European Parliament, *Hearing of Jozef Sikela*, transcript (verbatim report), November 6, 2024, https://hearings.elections.europa.eu/documents/sikela/sikela_verbatimreporthearing-original.pdf.

117 Jörg Wischermann, “Vietnam: The Just Energy Transition Partnership (JETP) Has High Political Costs,” *Heinrich-Böll-Stiftung*, March 10, 2024, <https://www.boell.de/en/2024/03/10/just-energy-transition-partnership-vietnam-jetp-has-high-political-costs>.

IV. Understanding Spaces of Convergence with Indo-Pacific Partners

Building on the analysis of the current state of play, as well as future opportunities

and challenges in bolstering the EU's cooperation with the case study countries, this section examines the infrastructure cooperation and connectivity policies of select partner countries. It identifies synergies between these strategies and the EU's GG initiative, demonstrating concrete mechanisms that can facilitate the inclusion of these partners' expertise and resources to support the implementation of the GG.

Cooperation with like-minded partners who boast strong track records in infrastructure and connectivity initiatives across the Indo-Pacific region can become a critical force multiplier for projects implemented under the aegis of the GG. Given the EU and GG's position as a relative "newcomer"¹¹⁸ in a crowded development cooperation landscape, particularly in large-scale hard infrastructure, the alignment of efforts through co-financing, capacity-building, and experience-sharing initiatives would not only enhance the impact of bilateral cooperation but also reinforce the credibility and operational effectiveness of the GG initiative.

The authors of this study specifically consider opportunities for cooperation with partners, including Japan, South Korea, Australia, Aotearoa New Zealand, and Taiwan. The case selection has been informed by the relevance of these entities to the EU's Indo-Pacific Strategy and their potential for deepening cooperation under the GG. Additionally, three core notions are driving this selection: (1) **Consolidation**, (2) **Formation**, and (3) **Ductility**.

Cooperation with Japan – mentioned 22 times in the EU Indo-Pacific Strategy,¹¹⁹ second only to India – on the GG is informed by the notion "**Consolidation**." As a long-standing strategic partner, Japan has engaged in connectivity cooperation with the EU since the signing of the EU-Japan Connectivity Partnership in 2019. The GG has been referenced in high-level joint statements, including the EU-Japan Summit 2023 Joint Statement,¹²⁰ and Japan is already involved in flagship projects, such as the B c  i hydropower storage facility in Vietnam. Then-Prime Minister Fumio Kishida also delivered video remarks at the 2023 Global Gateway summit.¹²¹ These existing foundations create clear potential for further expanding

118 Kjeld van Wieringen, *Global Gateway 2030: Future of Europe's Global Infrastructure Bid*, In-Depth Analysis no. PE 757.826 (Brussels: European Parliamentary Research Service, July 2024), [https://www.europarl.europa.eu/RegData/etudes/IDAN/2024/757826/EPRS_IDA\(2024\)757826_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/IDAN/2024/757826/EPRS_IDA(2024)757826_EN.pdf).

119 European Commission, *The EU Strategy for Cooperation in the Indo-Pacific*, September 16, 2021, https://www.eeas.europa.eu/sites/default/files/jointcommunication_2021_24_1_en.pdf.

120 European Council, *EU-Japan Summit 2023: Joint Statement*, July 13, 2023, <https://www.consilium.europa.eu/en/press/press-releases/2023/07/13/eu-japan-summit-2023-joint-statement/>.

121 Japan Ministry of Foreign Affairs, *Video Message by Prime Minister Kishida at the Global Gateway Forum Hosted by the European Commission*, October 25, 2023, https://www.mofa.go.jp/erp/ep/page5e_000074.html.

collaboration, particularly by clarifying protocols, aligning branding, and leveraging Japan's credibility and technical capacity in regional infrastructure development.

Simultaneously, "**Formation**" is a key task for propelling cooperation with South Korea (14 mentions), Australia (12), and Aotearoa New Zealand (8) under the GG. These are well-established, like-minded partners of the EU with a proven record of regional development cooperation in Southeast Asia and the South Pacific. Some statements between the EU and these partners have increasingly referenced the Global Gateway, indicating shared interest.¹²² However, opportunities remain underdeveloped in practical terms. Building on their development footprints, there is scope to translate political goodwill into structured, project-based cooperation aligned with GG's strategic pillars, including energy, digital, and transport connectivity. Specifically, in the case of Aotearoa New Zealand, the EU could benefit from Wellington's clear focus on development cooperation with the Pacific Island countries, a subregion of the Indo-Pacific where the bloc encounters difficulties in forming a meaningful footprint.

Taiwan, while not formally recognized under EU foreign policy due to the bloc's one-China policy and difficulties in attaining consensus on institutionalization among the EU27, is included under "**Ductility.**" Cooperation with Taiwan should be "pliable" without being "brittle" – practical, demand-driven, and rooted in mutual interests, particularly in soft infrastructure and regulatory connectivity, while respecting sensitivities surrounding the EU's engagements with this Indo-Pacific partner. Indeed, the EU is showing an increasing political will¹²³ to treat Taiwan as a like-minded partner in its own right and to expand informal, albeit substantive, engagements with Taipei, including under the GG framework.¹²⁴

4.1 – Japan

In terms of identifying convergence with the EU's like-minded partners to co-investment and implement GG project, Japan stands as the EU's most structured and advanced partner.

Japan's development cooperation approach is deeply embedded in its foreign policy architecture, balancing normative commitments with strategic considerations. The revised Japan Development Cooperation Charter (2023) formalized this outlook by elevating human security as the guiding principle underpinning all development efforts.¹²⁵

¹²² European Commission, *Joint Statement: EU–Republic of Korea Summit 2023*, May 21, 2023, https://ec.europa.eu/commission/presscorner/detail/en/statement_23_2863; Australian Office of the Prime Minister, "EU–Australia Leaders' Meeting 2022," media release, November 16, 2022, <https://www.pm.gov.au/media/eu-australia-leaders-meeting-2022>.

¹²³ Marcin Jerzewski, "Roadblocks Ahead? Taiwan–Europe Relations after 2024 Elections," *China Observers in Central and Eastern Europe* (CHOICE), January 23, 2024, <https://chinaobservers.eu/roadblocks-ahead-taiwan-europe-relations-after-2024-elections/>.

¹²⁴ European Parliament, *European Parliament Resolution of 15 September 2022 on the Situation in the Strait of Taiwan (2022/2822(RSP))*, September 15, 2022, https://www.europarl.europa.eu/doceo/document/TA-9-2022-0331_EN.html.

¹²⁵ Japan Ministry of Foreign Affairs of Japan, *White Paper on Development Cooperation 2023: Japan's International Cooperation*, January 23, 2025, https://www.mofa.go.jp/policy/oda/pagew_000001_00277.html.

The centrality of human security in Japan's approach to development cooperation also implies links to hedging as Tokyo's dominant behavior in the international system, including in response to the rise of China.¹²⁶ The emergence of the development-human security addresses structural vulnerabilities in governance, health, climate, and conflict prevention, emphasizing inclusive, people-centered solutions that are locally owned and context-sensitive.¹²⁷ Consequently, the pursuit of human security is closely linked to its aspiration to maintain the status of a middle power, which does not explicitly balance against China but seeks to develop its idiosyncratic "positive offer" of engagement with external partners to safeguard its own strategic interests.¹²⁸ This is highly consistent with the EU's Indo-Pacific strategy, which is *de facto* characterized as hedging against China as well, most clearly manifested in the EU's infamous threefold characterization of Beijing as partner, competitor, and systemic rival.

Japan's 2022 National Security Strategy (NSS) further underscores the integration of development and security policy. It identifies Official Development Assistance (ODA) as a strategic instrument to build regional stability and increase Tokyo's "comprehensive national power."¹²⁹ While distinct from Japan's emerging Official Security Assistance (OSA), the ODA's strategic positioning complements the EU's view of GG as a geopolitical instrument, albeit one not formally under the EU's Common Security and Defense Policy. The alignment of strategic development goals thus provides a strong normative and operational basis for deepened Japan-EU cooperation under the GG framework.

Connectivity has become a hallmark of Japan's Indo-Pacific engagement, exemplified by flagship initiatives such as the Japan-ASEAN Comprehensive Connectivity Initiative¹³⁰ and the Partnership for Quality Infrastructure.¹³¹ These projects prioritize high standards, transparency, and local ownership—core principles shared by the GG. Japan also pursues a multi-stakeholder approach, exemplified by the NGO-JICA Japan Desks, which facilitate civil society engagement and ensure regulatory integrity in third-country partnerships.¹³² Additionally, Japan promotes blended finance to mobilize private sector capital in development, aligning closely with EU efforts to de-risk and crowd-in investments.¹³³

126 Local expert in discussion with authors Tokyo, March 2025.

127 Japan International Cooperation Agency (JICA), *Human Security Today*, March 2022, https://www.jica.go.jp/Resource/jica-ri/publication/booksandreports/jveaq80000071xq-att/Human_Security_Today_EN_20221031.pdf.

128 Non-EU diplomat in discussion with authors, Suva, March 2025. See also Yoshihide Soeya, "Japan Can Lead the Way for 'Middle-Power Diplomacy' in the New Trump Era," *Global Asia* 19, no. 4 (December 2024), https://www.globalasia.org/v19no4/cover/japan-can-lead-the-way-for-middle-power-diplomacy-in-the-new-trump-era_yoshihide-soeya.

129 Cabinet Secretariat, Government of Japan, *National Security Strategy of Japan* (Provisional Translation), December 2022, <https://www.cas.go.jp/jp/siryoku/221216anzenhoshou/nss-e.pdf>.

130 Ministry of Foreign Affairs, Japan, *Japan-ASEAN Comprehensive Connectivity Initiative*, September 2023, <https://www.mofa.go.jp/files/100548816.pdf>

131 Ministry of Foreign Affairs of Japan, *Partnership for Quality Infrastructure*, accessed August 9, 2025, <https://www.mofa.go.jp/files/000117998.pdf>.

132 Non-EU diplomat in discussion with authors, Suva, March 2025. See also Masaaki Ohashi, "NGOs and Japan's ODA: Critical Views and Advocacy," in *Japan's Development Assistance*, ed. Hiroshi Kato, John Page, and Yasutami Shimomura (London: Palgrave Macmillan, 2016), 327–343, https://link.springer.com/chapter/10.1057/9781137505385_20.

133 Non-EU diplomat in discussion with authors Brussels, March 2025.

The main framework underpinning the advanced framework to support cooperation with Japan on GG implementation is the EU–Japan Connectivity Partnership, signed in 2019.¹³⁴ This agreement explicitly anchors cooperation in the domains of energy, digital, transport, and people-to-people connectivity, all grounded in shared values and standards such as sustainability, transparency, and a level playing field—principles that are core to both the GG and Japan’s Development Cooperation Charter. A 2023 EU handout on the partnership highlights a number of projects involving Japan, including cooperation on JTEP’s in Vietnam and other countries.¹³⁵ Importantly, the European Investment Bank (EIB) and Japan International Cooperation Agency (JICA) also signed a memorandum of understanding, expressing their intention to intensify their cooperation outside the EU, particularly in the Indo-Pacific. The agreement aims to enhance co-financing in sectors such as climate, infrastructure, and health, aligning closely with the GG priorities.¹³⁶

This alignment was further underscored by then-Prime Minister Fumio Kishida’s participation in the 2023 Global Gateway Forum, signaling high-level political endorsement.¹³⁷ More broadly, EU-Japan convergence on infrastructure and connectivity cooperation also unfolds within the G7 framework, particularly through the Partnership for Global Infrastructure and Investment (PGII)—a G7-wide initiative in which the EU is a contributing non-enumerated member.¹³⁸ Through PGII, both sides can coordinate infrastructure investments in third countries, further institutionalizing their shared approach to high-quality, strategic connectivity. Notably, the European Parliament called on the EEAS and the Commission to expand cooperation with Japan under the GG and PGII to “develop more balanced relations with countries from the Global South.”¹³⁹

In the case study countries considered in this report, Japan has a strong record of promoting cooperation through multi-dimensional connectivity initiatives. Japan’s development cooperation in Vietnam is one of the most comprehensive in Southeast Asia, built on decades of strategic partnership.¹⁴⁰ Japan is Vietnam’s largest ODA donor, focusing on high-quality infrastructure aligned with the “quality growth” principle.¹⁴¹ A key flagship project is the Bắc Ái Pumped Storage Hydropower Project under

134 European External Action Service, *The Partnership on Sustainable Connectivity and Quality Infrastructure between the European Union and Japan*, September 23, 2019, <https://www.eeas.europa.eu/eeas/partnership-sustainable-connectivity-and-quality-infrastructure-between-european-union-and-japan#:~:text=The%20EU%20and%20Japan%20intend%20to%20work,incl%20digital%2C%20transport%2C%20energy%20and%20people%20to%20people%20exchanges.&text=The%20EU%20and%20Japan%20continue%20to%20work,enhancement%20of%20safety%20and%20security%20of%20transport>.

135 Foreign Press Center Japan, *EU–Japan Connectivity Partnership: Transport, Infrastructure, Energy Projects*, July 2023, <https://fpcj.jp/wp/wp-content/uploads/2023/07/90eb286bf5782b20a23e8f9182146110.pdf>.

136 Non-EU diplomat in discussion with authors Brussels, March 2025.

137 Ministry of Foreign Affairs of Japan, *Video Message by Prime Minister Kishida at the Global Gateway Forum Hosted by the European Commission*, October 25, 2023, https://www.mofa.go.jp/erp/ep/page5e_000074.html.

138 European Commission, *The EU Contribution to the Global Gateway: Partnership for Global Infrastructure and Investment*, n.d., accessed August 8, https://international-partnerships.ec.europa.eu/policies/global-gateway/eu-contribution-partnership-global-infrastructure-and-investment_en.

139 Kjeld van Wieringen, *Global Gateway 2030: Future of Europe’s Global Infrastructure Bid*, In-Depth Analysis no. PE 757.826 (Brussels: European Parliamentary Research Service, July 2024), [https://www.europarl.europa.eu/RegData/etudes/IDAN/2024/757826/EPRS_IDA\(2024\)757826_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/IDAN/2024/757826/EPRS_IDA(2024)757826_EN.pdf)

140 Non-EU diplomat in discussion with authors Brussels, April 2025.

141 Non-EU diplomat in discussion with authors in Hanoi, April 2025.

JTEP—highlighting convergence with the GG. Japan's approach blends infrastructure with institutional support, regulatory reform, and capacity-building, helping Vietnam navigate both economic growth and geopolitical balancing vis-à-vis China.

In Fiji, Japan's assistance centers on transportation infrastructure, disaster resilience, and energy transition. The upgrading of Nadi International Airport stands out as a showcase of "multi-fold connectivity"—not just improving physical infrastructure but also advancing regulatory connectivity through ICAO standards alignment.¹⁴² It is a part of a broader, country-wide initiative of JICA which supports procurement air traffic control and safety equipment at five airports, including Nadi Airport, and consulting services.¹⁴³ Japan's cooperation also extends to clean energy (e.g., hydrogen generator trials), agriculture, and power-sector investment (notably, 50 percent Japanese ownership in Energy Fiji Limited¹⁴⁴). Cultural diplomacy and initiatives bolstering human security, such as food security and disaster preparedness, are also integral. Amid increased Chinese influence, Japan positions itself as a long-term, norms-based partner, mirroring EU principles under GG. This layered engagement supports Fiji's development goals while reinforcing a rule-based order in the Pacific.

Given the strategic depth of EU–Japan ties, including the 2019 Connectivity Partnership, co-investment in flagship GG initiatives, and shared values in G7-led infrastructure cooperation, Japan emerges as the EU's most structured and mature partner in the Indo-Pacific. Yet, despite this strong foundation, operational alignment in third countries remains ad hoc and under-institutionalized. The following recommendations aim to move this relationship from rhetorical convergence to formalized, project-level cooperation under the GG umbrella.

4.2 – Republic of Korea

Seoul's approach to development cooperation is guided by the Mid-Term Sectoral Strategy of the Korea International Cooperation Agency (KOICA), which manages ODA grants. The document demonstrates a very strong overlap between Seoul's priority areas for cooperation and the Sustainable Development Goals, highlighting convergence between partnerships pursued and supported by Seoul and broader multilateral frameworks operationalized by the United Nations. Specifically, there are twelve priority goals, including global health, humanitarian aid, the Green New Deal, diversified finance, and civil society engagement. ODA is aligned with Korea's foreign policy, notably its Indo-Pacific strategy.¹⁴⁵

Notably, a significant challenge to the effective implementation of the

142 Non-EU diplomat in discussion with authors Suva, March 2025.

143 Japan International Cooperation Agency (JICA). "Signing of Grant Agreement with Fiji: Contributing to the Safety of Aircraft Operations through the Maintenance of Air Traffic Control and Safety Facilities at Five Airports." *Press release*, September 18, 2024. https://www.jica.go.jp/english/information/press/2024/20240918_21.html.

144 EU official in discussion with authors Suva, March 2025; nevertheless, it is imperative to highlight that Japanese ownership in Energy Fiji Limited is not an ODA project. Japan Bank for International Cooperation and Chugoku Electric acquired a 44% shareholding in Energy Fiji Limited.

145 Local stakeholder in discussion with authors Seoul, February 2025.

strategy and identifying areas of convergence with third countries is Korea's limited experience in involving the private sector. Seoul plans to double its ODA budget by 2030, with a 60-40 split between grants and loans and a high share of untied aid.¹⁴⁶ Yet, it was not until November 2022 that Seoul introduced actionable plans for enhancing private sector involvement in its infrastructure cooperation programs through blended finance and impact investment.¹⁴⁷ This points to a pronounced communication and capacity gap, where private companies encounter difficulties in understanding development issues that could be innovatively addressed through their solutions.¹⁴⁸ This shortcoming is relevant in the context of a discussion about "chasing convergence" between the GG and South Korea's cooperation programs, given the strong emphasis on private sector involvement under the EU's initiative.

Although South Korea does not have a standalone connectivity strategy, the concept features prominently in its Indo-Pacific vision and development practice. Connectivity is one of six core principles underpinning Seoul's vision for the Indo-Pacific "regional operating system",¹⁴⁹ operationalized through strong cooperation within ASEAN.¹⁵⁰ The ASEAN-Korea Center hosts an annual ASEAN Connectivity Forum,¹⁵¹ linking Korean businesses to regional infrastructure projects. Korea also coordinates with the ASEAN Connectivity Coordinating Committee to align strategies. On the digital front, Korea's Overseas Infrastructure Development Support Corporation (KIND) agency supports infrastructure investments in Southeast Asia, and the 2019 5G+ Strategy promotes regional 5G expansion, especially in ASEAN and India.¹⁵² Collectively, these efforts reflect Korea's commitment to enhancing regional integration through both physical and digital infrastructure support.

Overall, the EU's cooperation with Seoul is very comprehensive, with economic, political, and security agreements in place. While a formal connectivity partnership akin to that with Japan does not exist, connectivity features prominently in bilateral cooperation. The 2023 EU-Korea Summit highlighted transport as a shared priority, and digital cooperation, particularly on AI, data protection, and cybersecurity, has deepened, with the two sides sharing a human-centric approach. Notably, Korea expressed strong interest in Global Gateway collaboration, as outlined in the readout

146 Republic of Korea Official Development Assistance, *Sharing Hope, Sharing Future: Official Development Assistance of the Republic of Korea*, n.d., accessed June 10, 2025 https://www.developmentaid.org/api/frontend/cms/file/2023/07/brochureeng_2021.pdf.

147 Republic of Korea Ministry of Foreign Affairs, "제43차 국제개발협력위원회 서면 개황" ["The 43rd International Development Cooperation Committee Held in Writing"], press release, November 17, 2022, https://www.mofa.go.kr/www/brd/m_4080/view.do?seq=373101.

148 EU diplomat in discussion with authors Seoul, February 2025.

149 Yul Sohn, "Korea's Global Indo-Pacific Strategy: Regional Order of Symbiosis and Prosperity" *East Asia Institute*, December 30, 2022, [https://www.eai.or.kr/avanplus/filedownload.asp?o_file=2023010292457166879313.pdf&uppath=/data/bbs/eng_special/&u_file=\[Indo-PacificStrategySpecialReport\]ExecutiveSummary.pdf](https://www.eai.or.kr/avanplus/filedownload.asp?o_file=2023010292457166879313.pdf&uppath=/data/bbs/eng_special/&u_file=[Indo-PacificStrategySpecialReport]ExecutiveSummary.pdf).

150 Asan Institute for Policy Studies, "ASEAN-Korea Comprehensive Strategic Partnership: Background, Meaning, and the Way Forward," n.d., accessed August 4, 2025, <http://en.asaninst.org/contents/asean-korea-comprehensive-strategic-partnership-background-meaning-and-the-way-forward/>.

151 Kim Hyun-bin, "ASEAN-Korea Centre Hosts 12th ASEAN Connectivity Forum," *The Korea Times*, January 10, 2025, <https://www.koreatimes.co.kr/foreignaffairs/20250110/asean-korea-centre-hosts-12th-asean-connectivity-forum>.

152 Maaik Okano-Heijmans and Wilhelm Vosse, "Promoting Open and Inclusive Connectivity: The Case for Digital Development Cooperation," *Research in Globalization* 3 (December 2021), Article 100061, <https://www.sciencedirect.com/science/article/pii/S2590051X21000265>.

from the 9th EU–Korea Policy Consultation on Development Cooperation,¹⁵³ where both sides agreed to coordinate green, energy, and digital projects in Indo-Pacific subregions and beyond.

Across the two case study countries, South Korea's projects reflect its emphasis on digital innovation, infrastructure, and climate resilience. In Vietnam, KOICA supports projects aligned with the country's digital transformation goals, including smart city development, e-government, and vocational training in high-tech fields. Korea also contributes to climate adaptation through water management and disaster risk reduction.¹⁵⁴ In Fiji, Korea's support focuses on enhancing renewable energy capacity, climate-smart agriculture, and sustainable fisheries.¹⁵⁵ Projects also address institutional strengthening and gender inclusion. In both countries, Korea's aid prioritizes alignment with national development strategies, fostering inclusive and sustainable growth, and reinforcing broader Indo-Pacific engagement.

While Korea's approach to development cooperation demonstrates a certain degree of divergence from the GG, particularly in Pacific Island nations where Seoul has strong programs in fisheries and agriculture that are outside of the scope of the EU's initiative, there is apparent convergence in digital connectivity. Korea's strengths in ICT and interest in clean supply chains complement the EU's priorities, though Korea's limited PPP and development banking experience may limit synergy.

Despite the absence of a formal connectivity partnership akin to the EU–Japan framework, the Republic of Korea has emerged as a strategically aligned, technically capable, and increasingly proactive development partner in the Indo-Pacific. Seoul's Indo-Pacific Strategy places strong emphasis on digital connectivity, regional integration, and ASEAN engagement—core priorities also present in the GG initiative. While South Korea's development model continues to evolve, particularly in relation to blended finance and private sector engagement, the country's strengths in digital innovation, smart infrastructure, and technical cooperation offer clear complementarities with the GG. To move beyond rhetorical alignment and toward actionable co-investment, targeted mechanisms are needed to address coordination gaps and build institutional capacity.

4.3 – Australia

Australia's revised International Development Policy, published in 2023, reframed development as a strategic instrument for promoting peace, stability, and prosperity in the Indo-Pacific.¹⁵⁶ While not overtly

153 Republic of Korea Ministry of Foreign Affairs, "Outcome of 9th Korea-EU Policy Consultation on Development Cooperation," March 21, 2024, https://www.mofa.go.kr/eng/brd/m_5676/view.do?seq=322485&page=1.

154 Republic of Korea Committee for International Development Cooperation, *2023 ODA Collaborative Program Work Plan*, n.d., accessed August 1, 2025, https://www.odakorea.go.kr/fileDownload.xdo?file_id=1493457144956192168139KLUeBWNHGxLTUNSN1293.

155 Fiji Ministry of Foreign Affairs, "Fiji–Korea Relations Advance: Hon. Qereqeretabua Meets with the Deputy Foreign Minister for the Republic of Korea," August 30, 2024, <https://www.foreignaffairs.gov.fj/fiji-korea-relations-advance-hon-qereqeretabua-meets-with-the-deputy-foreign-minister-for-the-republic-of-korea/>.

156 Australian Department of Foreign Affairs and Trade, *International Development Policy*, n.d., accessed May 27, 2025, <https://www.dfat.gov.au/sites/default/files/international-development-policy.pdf>.

confrontational, the policy implicitly positions Australia's offer of cooperation as an alternative, with strong normative underpinnings, to China's BRI, emphasizing transparency, sustainability, and respect for sovereignty. It prioritizes locally led development, blended finance, and private sector engagement to drive economic and social transformation. Additionally, new signature initiatives, such as the Australia-Tuvalu Falepili Union,¹⁵⁷ which includes pathways for mobility, climate resilience, and security cooperation,¹⁵⁸ showcase Australia's efforts towards identifying an equilibrium akin to the EU's "principled pragmatism" normative approach to regional engagement. These principles align closely with the GG's emphasis on democratic values, human-centric connectivity, and sustainable finance, creating significant potential for convergence. Additionally, Australia's focus on the Pacific and Southeast Asia mirrors the synergies between the GG's and the EU's Indo-Pacific Strategy, offering a complementary development footprint. The policy's whole-of-government and partner-driven model provides a compelling blueprint for collaboration under the GG framework.

Canberra has adopted tailored development partnership plans with both Vietnam and Fiji, emphasizing country-led priorities and locally embedded delivery mechanisms. In Vietnam (2025–2030), Australia supports economic resilience through digital transformation, infrastructure financing, and climate adaptation.¹⁵⁹ In Fiji (2024–2028), the partnership focuses on inclusive economic recovery, climate and disaster resilience, and transparent governance.¹⁶⁰ Australia collaborates through local governments and trusted implementing partners, focusing on Pacific-led solutions in Fiji and aligning strategically with Vietnam's Five-Year Plans. These engagements reflect Australia's emphasis on long-term, flexible partnerships, which closely mirror GG's values of sustainability, resilience, and local ownership.

In the broader context of bilateral relations, Australia and the EU share a comprehensive bilateral framework, established under the EU-Australia Framework Agreement, which was signed in 2017 and ratified in 2022. The agreement provides the institutional foundation for cooperation across foreign policy, development, security, and climate action. The EU's Indo-Pacific Strategy explicitly calls for intensified connectivity cooperation with Australia, recognizing its strong regional presence and like-minded commitment to democratic norms. Additionally, the EU's Indo-Pacific Strategy calls expressly for enhanced cooperation with Australia, particularly in digital connectivity, an area of strategic convergence under the GG. Australia's digital development ambitions closely mirror the EU's Digital Agenda and GG goals to expand smart, secure, and interoperable systems globally.

157 Australian Department of Foreign Affairs and Trade, "Joint Statement on the Falepili Union between Tuvalu and Australia," November 9, 2023, <https://www.dfat.gov.au/geo/tuvalu/joint-statement-falepili-union-between-tuvalu-and-australia>.

158 Marcin Jerzewski, "Tuvalu Elects: A Micro-Perspective on Shifting Power Dynamics in the Pacific," *European Values Center for Security Policy*, March 5, 2025, <https://europeanvalues.cz/en/tuvalu-elects-a-micro-perspective-on-shifting-power-dynamics-in-the-pacific/>.

159 Australian Department of Foreign Affairs and Trade, *Australia-Vietnam Development Partnership Plan 2025–2030*, n.d., accessed August 1, 2025, <https://www.dfat.gov.au/sites/default/files/australia-vietnam-development-partnership-plan-2025-2030.pdf>.

160 Australian Department of Foreign Affairs and Trade, *Australia-Fiji Development Partnership Plan 2024–2028*, n.d., accessed August 1, 2025, <https://www.dfat.gov.au/sites/default/files/australia-fiji-development-partnership-plan-2024-2028.pdf>.

Within the realm of digital connectivity, there are ample opportunities for cooperation, particularly in relation to submarine cable infrastructure. The 2024 EU-Australia Digital Dialogue reaffirmed commitments to cybersecurity, platform governance, and secure data infrastructure, culminating in an Administrative Agreement on social media regulation and exploratory cooperation on submarine cables.¹⁶¹ Australia has taken steps to position itself as a regional digital hub by boosting submarine cable resilience, maintenance capacity, and regional repair capabilities.¹⁶² This aligns with GG priorities on secure and rules-based digital systems. Given shared concerns over geostrategic vulnerabilities and digital supply chain dependencies, both the EU and Australia emphasize the importance of coordination with industry, norm-setting, and infrastructure governance. These synergies offer concrete opportunities for GG-branded collaboration that advances security, connectivity, and regional digital sovereignty in the Indo-Pacific.

Moreover, Australia's experience in supporting trade implementation in developing Indo-Pacific economies aligns with the GG's regulatory and economic connectivity goals. Both actors promote human-centric digital transformation, rules-based governance, and infrastructure resilience, creating clear synergies for structured collaboration under the GG framework. Given the shared values and strategic interests, coordinated action, especially in hard infrastructure and regulatory frameworks, can significantly bolster the GG's reach and impact in the Pacific and Southeast Asia.

Australia's 2023 International Development Policy marks a shift toward a more strategic, values-driven approach to regional development cooperation—closely aligned with the EU's GG initiative in intent. Canberra emphasizes locally led partnerships, infrastructure resilience, blended finance, and digital connectivity, with a sharp focus on Southeast Asia and the Pacific. Furthermore, Australia's growing engagement in submarine cable infrastructure and critical minerals supply chains reflects converging geoeconomic interests with the EU. However, despite shared strategic objectives and a robust bilateral framework under the EU-Australia Framework Agreement, formal GG-specific cooperation mechanisms remain limited. To bridge this gap and unlock the full potential of EU-Australia convergence in the Indo-Pacific, Brussels should initiate efforts to institutionalize coordination and facilitate co-branded implementation.

4.4 – Aotearoa New Zealand

The development strategy of Aotearoa New Zealand is unequivocally informed by its geography and a sense of responsibility for its neighborhood. One of its most explicit features is a razor-sharp regional focus: 60 percent of its ODA funding is allocated to developing countries in the South Pacific.¹⁶³

¹⁶¹ European Commission, "The EU and Australia Accelerate Their Digital Cooperation," June 12, 2024, <https://digital-strategy.ec.europa.eu/en/news/eu-and-australia-accelerate-their-digital-cooperation>.

¹⁶² Jocelinn Kang and Jessie Jacob, *Connecting the Indo-Pacific: The Future of Subsea Cables and Opportunities for Australia*, Australian Strategic Policy Institute, September 25, 2024, <https://www.aspi.org.au/report/connecting-indo-pacific-future-subsea-cables-and-opportunities-australia/>.

¹⁶³ New Zealand Ministry of Foreign Affairs and Trade, *Our Development Cooperation Partnerships in the Pacific*, n.d., accessed August 3, 2025, <https://www.mfat.govt.nz/en/aid-and-development/our-development-cooperation-partnerships-in-the-pacific>.

A smaller proportion of its initiatives materializes in Southeast Asia.¹⁶⁴ A key tenet of Wellington's approach to development cooperation is its respect for Pacific regionalism. Therefore, its officials highlight that any infrastructure and connectivity initiative should align with the Pacific Islands Forum's 2050 Strategy for the Blue Pacific Continent and its implementation facilitated through "high-level and multistakeholder political engagement," which they deem "essential to understand [the Pacific partners'] priorities."¹⁶⁵ In light of this strong emphasis on partners' needs, a significant share of resources is dedicated to targeting adaptation, a key priority for the Pacific.¹⁶⁶

Aotearoa New Zealand's approach to fostering development, infrastructure, and connectivity partnerships is not myopically focused on its immediate neighborhood, as it is rooted in comprehensive assessments of the "shifting world." This includes medium-term priorities for bolstering the country's security, prosperity, and sustainability expressed in the Strategic Intentions 2024-2028,¹⁶⁷ and the strategic review of New Zealand's international context to 2035.¹⁶⁸ These documents recognize sharpening geopolitical competition in the Indo-Pacific as a major "megatrend" and potential systemic challenge, indicating a shift "from rule to power".

This explains a very pragmatic approach of the country in selecting initiatives it supports. Aotearoa New Zealand sees itself as "a relatively small country" which in turn "does not focus on large infrastructure projects,"¹⁶⁹ and in turn supports many technical assistance, capacity building, and soft infrastructure initiatives.¹⁷⁰ At the same time, select projects that address hard infrastructure needs, balance solutions to local challenges, like limited physical connectivity and climate resilience, and strategic considerations regarding critical infrastructure. As Wellington "aims to provide high-quality infrastructure that is reliable, well-built, and resilient in all aspects,"¹⁷¹ it has contributed to projects like airports in the Solomon Islands (while Honiara witnesses growing Chinese influence) and ships for Tokelau.

Since 2016, the partnership between the EU and Aotearoa New Zealand has developed on the basis of the Partnership Agreement on Relations and Cooperation (PARC), which includes global development and humanitarian aid as one of seven enumerated areas for cooperation.¹⁷² Yet, the GG has not mentioned explicitly as a framework that could support joint projects on infrastructure development and facilitation of connectivity initiatives.

164 Asian Development Bank, "New Zealand," n.d., accessed August 7, 2025, <https://www.adb.org/multimedia/partnership-report2024/our-partners/bilaterals/new-zealand/>.

165 Non-EU diplomat in discussion with authors Brussels, April 2025.

166 New Zealand Ministry of Foreign Affairs and Trade, "New Zealand's Climate Action in Our Region," accessed August 10, 2025, <https://www.mfat.govt.nz/en/environment/climate-change/supporting-our-region>.

167 New Zealand Ministry of Foreign Affairs and Trade, *Strategic Intentions 2024–2028*, n.d., accessed August 9, 2025, <https://www.mfat.govt.nz/assets/About-us-Corporate/MFAT-strategies-and-frameworks/Strategic-Intentions-2024-2028.pdf>.

168 New Zealand Ministry of Foreign Affairs and Trade, *Navigating a Shifting World*, July 2023, <https://www.mfat.govt.nz/assets/About-us-Corporate/MFAT-strategies-and-frameworks/MFATs-2023-Strategic-Foreign-Policy-Assessment-Navigating-a-shifting-world-June-2023.pdf>.

169 Non-EU diplomat in discussion with authors Brussels, April 2025.

170 Non-EU diplomat in discussion with authors Suva, March 2025.

171 Non-EU diplomat in discussion Brussels, April 2025

172 European Union, *Partnership Agreement on Relations and Cooperation between the European Union and its Member States, of the one part, and New Zealand, of the other part*, n.d., accessed August 8, 2025, https://eur-lex.europa.eu/eli/agree_internation/2016/2079/oj/eng.

Notably, the GG has not been mentioned in the readout following the May 2024 EU-New Zealand Joint Committee, suggesting that there is little momentum to expand the aforementioned global development cooperation beyond an exchange of information about both sides' undertakings. Lawrence Meredith, the EU's envoy to Wellington who assumed office in May 2024, identified infrastructure cooperation as a potential area for cooperation, also in reference to the GG.¹⁷³ Yet, a crucial factor will be the EU's willingness to not only share its own experiences in infrastructure projects, but also to learn from Aotearoa New Zealand, which is significantly more experienced as a development partner in the South Pacific, a region where the bloc's capacity is extremely limited.¹⁷⁴

Aotearoa New Zealand represents a uniquely valuable partner for the EU in the Indo-Pacific, particularly in the Pacific Island subregion. Wellington's development model emphasizes Pacific regionalism, adaptation-focused infrastructure, and local ownership, which complements the GG's stated principles of sustainability, transparency, and inclusivity. Its deep-rooted presence, including through high-trust relationships with local governments and communities, gives it operational advantages that the EU, as a relative newcomer, currently lacks. The EU should seek to harness Aotearoa's subregional expertise and build structured, GG-aligned cooperation that reflects the distinct needs and governance dynamics of Pacific Island Countries.

4.5 – Taiwan

Taiwan's model of development cooperation is informed by its own development story. Even when the island was still a net recipient of ODA, it sought to harness the power of its innovation, even if it meant cutting-edge banana and pineapple varieties rather than ultra-small chips, for strengthening its international reputation. Thus in 1959, Taiwan sent its first technical mission to the Republic of Vietnam.¹⁷⁵ Although Taipei only maintains formal diplomatic relations with eleven UN member states and the Holy See, its informal economic relations, educational exchanges, people-to-people ties, subnational diplomacy, and foreign assistance have become vital foreign policy tools. One of these tools is Taiwan's foreign assistance,¹⁷⁶ which primarily focuses on technical assistance and capacity building, including specialized training in health, agriculture, technology, engineering, and environmental protection.

The island democracy's model of international cooperation can be described as "society-centric."¹⁷⁷ It relies on close cooperation between experts, such as medical personnel or agricultural technologists, who build bottom-up,

173 Sam Sachdeva, "EU's Infrastructure Expertise on Offer to NZ – Ambassador," *Newsroom*, March 4, 2024, <https://newsroom.co.nz/2024/03/04/eus-infrastructure-expertise-on-offer-to-nz-ambassador/>.

174 Non-EU diplomats in discussion with authors Suva, March 2025; Brussels, April 2025

175 James Lin, *In the Global Vanguard: Agrarian Development and the Making of Modern Taiwan* (Oakland: University of California Press, 2025), <https://www.ucpress.edu/books/in-the-global-vanguard/paper>.

176 Republic of China (Taiwan) Ministry of Foreign Affairs, "Official Development Assistance," n.d., accessed August 6, 2025, <https://en.mofa.gov.tw/cp.aspx?n=1579>.

177 Marcin Jerzewski and KuanTing Chen, "Taiwan's Health Diplomacy Didn't Start With the COVID19 Crisis," *The Diplomat*, April 16, 2020, <https://thediplomat.com/2020/04/taiwans-health-diplomacy-didnt-start-with-the-covid-19-crisis/>.

between Europe and Southeast Asia," fostering collaboration and unlocking mutual benefits through experience sharing and business cooperation.¹⁸²

The language of the EP resolution demonstrates the potential for EU-Taiwan cooperation under the GG framework in the two subregions of the Indo-Pacific under consideration in this report – the Pacific Islands and Southeast Asia. Yet, it is in the latter that Taiwan has the strongest track record in implementing connectivity initiatives. Although the term does not appear explicitly in the New Southbound Policy, this flagship foreign policy framework, launched in 2016 and targeting 18 countries in South Asia, Southeast Asia, and Oceania, is arguably a *de facto* regional connectivity initiative. Similarly to the GG, it assumes a holistic view of diverse domains of the concept, including digital, economic, social, and regulatory connectivity. It rests on two pillars: economic and people-to-people ties, supporting Taiwan's strategy of diversification away from China as a risk mitigation measure.¹⁸³ Consequently, synergies between the GG and Taiwan's external action stem from the island's status as an ICT powerhouse, which can drive technology-driven connectivity initiatives, as well as its experience and networks in the region.

To harness the potential of these synergies, the EU and Taiwan should establish informal, albeit regular and comprehensive consultation mechanisms. Both sides already hold regular consultations and dialogues on an array of issues of mutual concern, ranging from trade to human rights.¹⁸⁴ Consequently, both sides could establish a bilateral platform on connectivity and development, with the latter area inspired by the existing framework between the bloc and the ROK. Additionally, Brussels and Taipei should regularly exchange information about their ongoing development projects to clearly and comprehensively map out areas of convergence. For example, after the withdrawal of USAID from Fiji, Taiwan's International Cooperation and Development Fund (ICDF) is seeking to identify a partner to scale up its successful healthcare digitization program across the broader South Pacific subregion.¹⁸⁵ This initiative is clearly aligned with the GG given its focus on health as well as digital and regulatory connectivity, as acknowledged by the EU during a recent visit to the Taiwan Technical Mission in Nausori.¹⁸⁶

182 Market Intelligence & Consulting Institute (MIC), "EU's Next Move in the Indo-Pacific? Partnering with Taiwan," November 21, 2024, <https://mic.iii.org.tw/Research.aspx?id=693&List=1>.

183 Marcin Jerzewski, "Taiwan Needs an Indo-Pacific Policy Involving the Pacific Islands," *CommonWealth Magazine*, August 5, 2021, <https://english.cw.com.tw/article/article.action?id=3050>.

184 Gisela Grieger, "EU-Taiwan Ties after Taiwan's 2024 Elections" (Brussels: European Parliament, Directorate-General for Parliamentary Research Services, March 13, 2024), <https://epthinktank.eu/2024/03/13/eu-taiwan-ties-after-taiwans-2024-elections/>.

185 International Cooperation and Development Fund, "Fostering Healthcare Resilience: First-Ever Taiwan-ICDF, USAID, and Fiji MHMS Collaboration to Develop a Healthcare App," June 14, 2024, <https://www.icdf.org.tw/wSite/ct?xitem=72053&ctNode=31572&mp=2>.

186 Non-EU diplomat in discussion with authors and local stakeholder Suva, March 2025

V. Policy Recommendations

Based on the preceding analysis of initiatives implemented in two case study countries, Vietnam and Fiji, and an overview of convergence and divergence between the GG and development, infrastructure, and connectivity initiatives of select like-minded partners in the Indo-Pacific region, this section presents concrete policy recommendations for increasing the impact and efficiency of the EU's GG.

5.1 – Japan

5.1.1 Formalize a Japan–EU operational coordination platform under the Connectivity Partnership to manage project pipelines in third countries, beginning with ongoing GG-flagged initiatives in Vietnam. This mechanism should include working groups on co-financing, regulatory alignment, and recipient country engagement. A structured coordination platform, comprised of officials from the European Commission, JICA, the EIB, and relevant DGs and line ministries, could serve as a standing forum to: (1) identify co-investment opportunities aligned with both GG and Japanese priorities (e.g. climate resilience, transport, digital infrastructure) and (2) harmonize procurement standards, ESG safeguards, and stakeholder engagement processes.

5.1.2 Develop joint co-investment and branding guidelines for Global Gateway–Japan initiatives to enhance strategic visibility, reduce attribution ambiguity, and communicate shared values. The EU and Japan should therefore co-develop a branding protocol that includes: (1) shared visibility guidelines (e.g., signage, communication materials, public statements); (2) criteria for attributing initiatives to the GG and/or the EU–Japan Connectivity Partnership; and (3) a model “label” or identity (similar to the Blue Dot Network concept) to reinforce a shared commitment to quality infrastructure, transparency, and local ownership.

5.1.3 Expand co-financing mechanisms between the European Investment Bank (EIB) and the Japan International Cooperation Agency (JICA), focusing on joint pipelines in climate, transport, and digital connectivity. While the EIB and JICA concluded an MOU to intensify cooperation in third countries, this agreement remains underutilized and lacks clear operational follow-up. Building on the success of the B ac  ai hydropower facility and other G7-aligned initiatives, the EU and Japan should scale up blended finance partnerships with: (1) pooled technical assistance funds to support project preparation in recipient countries with limited capacity; (2) sector-specific project pipelines, especially in areas where both actors have comparative advantages (e.g., Japan in resilient transport, EU in digital regulation and energy governance); (3) and exploration of joint impact metrics aligned with GG and Japan’s human security framework.

5.2 – Republic of Korea

5.2.1 Launch a high-level EU–Korea dialogue platform specifically focused on connectivity and digital infrastructure. This would build on existing development consultations while anchoring Seoul more firmly in GG-aligned efforts in ASEAN and beyond. A focused dialogue mechanism would provide a venue to: (1) coordinate digital and physical infrastructure strategies in Southeast Asia and the Pacific; (2) exchange information on pipeline projects led by KOICA, KIND, and European DFIs; and (3) explore co-branding and joint visibility strategies for digital and climate-related initiatives.

5.2.2 Facilitate capacity-building and knowledge-sharing on blended finance and multi-stakeholder partnerships through mechanisms such as the European Commission's Service for Foreign Policy Instruments. This can enhance Korea's institutional capabilities in public-private partnership (PPP) and public-private-people (4P) models and foster innovation in infrastructure finance. Seoul has only recently begun formalizing efforts to engage the private sector in infrastructure development. Therefore, challenges persist in translating these commitments into viable co-financing models. To close this implementation gap, the EU should (1) support technical exchanges between KOICA, KIND, and European DFIs; (2) regularly engage in lessons sharing from the EU's best practices in de-risking mechanisms, PPP/4P frameworks, and green finance regulation via platforms such as the Service for Foreign Policy Instruments; (3) Encourage joint feasibility studies on blended digital or climate infrastructure in ASEAN, where Korea's development footprint is strongest. By strengthening Korea's institutional toolbox, this cooperation would enhance mutual project compatibility, reduce transaction costs, and expand opportunities for GG-aligned investment in strategic subregions.

5.3 – Australia

5.3.1 Initiate a formal feasibility assessment of an EU–Australia Connectivity Partnership, aligned with Australia's expanding role in submarine cable infrastructure and digital hub ambitions in the Indo-Pacific. This would build on shared values of transparency, security, and sustainability. Australia is rapidly scaling up its investments in submarine cables, digital platforms, and cybersecurity to enhance regional digital sovereignty—priorities that align closely with GG's digital pillar. Consequently, this assessment should: (1) identify strategic overlaps in digital infrastructure, including planned and existing submarine cable projects in the Pacific; (2) propose modalities for coordination in co-financing, procurement standards, and data governance norms; and (3) assess opportunities for joint engagement in multilateral digital forums, such as the Pacific Islands Telecommunications Association (PITA) or ASEAN digital platforms.

5.3.2 Leverage the 2024 MoU on critical minerals to establish a concrete cooperation roadmap under the Global Gateway. As both actors recognize the importance of securing critical raw materials for the green and digital transitions. To move from broad alignment to operational action, the EU and Australia should co-develop a GG-branded cooperation roadmap that would include: (1) clear timelines and deliverables for co-investments in

sustainable mining, processing, and transport infrastructure in Australia and the broader Indo-Pacific; (2) opportunities for triangular cooperation in third countries (e.g. with Southeast Asian states) to support local beneficiation and value chain resilience; (3) explicit GG branding and visibility to demonstrate the EU's strategic engagement beyond Europe's immediate neighborhood.

5.4 – Aotearoa New Zealand

5.4.1 Increase the frequency and depth of EU–Aotearoa New Zealand dialogue platforms focused on digital connectivity and infrastructure governance. These forums should prioritize regulatory alignment and build upon the human-centric, values-based frameworks shared by both partners. While the PARC provides a broad framework for cooperation, it currently lacks a dedicated mechanism for aligning infrastructure and connectivity priorities. A structured dialogue would: (1) build on Aotearoa's strong ties with Pacific Island governments and its alignment with the 2050 Strategy for the Blue Pacific Continent; (2) identify joint opportunities in resilient digital infrastructure, climate-adaptive health systems, and transport modernization; and (3) ensure coordination on regulatory frameworks, procurement procedures, and local stakeholder consultation in line with both EU and Aotearoa New Zealand standards.

5.4.2 Support expert-level dialogue and capacity-building on connectivity and development in the Pacific Island Countries. This would promote joint EU–Aotearoa engagement in areas like digital access, resilient infrastructure, and local governance. Wellington's strengths lie not only in technical delivery but also in longstanding experience with culturally sensitive, community-led development—especially in the Pacific. The EU should, therefore, invest in: (1) shared training modules and exchanges between EU Delegations and New Zealand development staff on Pacific cultural protocols and governance; (2) joint scoping missions and feasibility studies for small-scale, high-impact infrastructure (e.g. cyclone-resistant health facilities, local energy systems); and (3) building capacity for multi-stakeholder engagement that respects customary leadership structures, as seen in Aotearoa's domestic and regional practice. The existing system of Foreign Policy Instruments could support these efforts.

5.5 – Taiwan

5.5.1 Foster regular EU–Taiwan consultations on connectivity and development. This would formalize ongoing informal collaboration and position Taiwan as a credible actor in value-based infrastructure cooperation under the Global Gateway. To build a more structured channel for engagement, the EU should (1) hold annual or biannual consultations focused on development cooperation, digital infrastructure, and health system strengthening; this could either take the form of establishing a new, dedicated consultations platform or greater involvement of the EU in the GCTF initiative, up to the level of becoming a full partner to the framework; (2) encourage the exchange of project data and pipeline visibility, particularly in third countries in Southeast Asia and South Pacific where both sides have an

active footprint; and (3) explore informal observer or advisory arrangements for Taiwan in EU-hosted GG roundtables or working groups, following models already used in trade and digital cooperation dialogues. This would provide a low-risk, politically feasible mechanism for strengthening coordination while respecting the EU's existing policy constraints, allowing both sides to scale up engagement in a pragmatic, modular, and mutually beneficial manner.

5.5.2 Promote ICT cooperation by encouraging Taiwanese firms to engage as PPP actors in Global Gateway projects as part of business consortia with their European counterparts. Their experience in semiconductors, cybersecurity, and 5G can enhance clean, secure digital supply chains across the Indo-Pacific. Specifically, the EU should (1) encourage Taiwanese firms to join GG-related PPP tenders and consortia, especially in Southeast Asia and the Pacific; (2) facilitate introductions between Taiwanese ICT providers and European DFIs and implementing agencies to identify co-investment or subcontracting opportunities; (3) utilize the EU–Taiwan Trade and Investment Dialogue (TID) and the Digital Economy Dialogue as platforms to explicitly promote GG participation and align strategic priorities (e.g., secure digital supply chains, connectivity standards, and digital literacy programs).

General Recommendations Regarding the Initiative's Design

5.6 – Visibility and Branding

5.6.1 Beyond intra-European coordination through Team Europe, EU Delegations in target countries should actively promote the Global Gateway (GG) as a collaborative platform. This includes mapping and showcasing areas of convergence with like-minded partners, co-branding joint initiatives, and engaging local stakeholders in shaping and narrating shared development efforts.

5.6.2 Rather than restate familiar values, the EU needs to articulate a fresh narrative alongside GG. This narrative should promote the image of a new, resurgent Europe capable of leading global progress. It should be a bold, forward-looking vision promising local job creation, industrialization, and better integration with the European single market. At a time when China is doubling down on industrialization, creating friction with partners the EU should emphasize compatibility in trade and investment between Europe and emerging markets.

5.6.4 Set up a dedicated coordination platform or task force—possibly within the EU Delegations and the European Economic and Trade Office—to harmonize Global Gateway outreach, ensure consistent branding, and align co-investments across Japan, Korea, Australia, Aotearoa New Zealand, and Taiwan.

5.6.3 Building upon the positive reputation of the EU as a regulatory power, center regulatory connectivity as a pillar of the GG in key sectors, including transport, energy, and digital. Partners could work toward mutual

recognition of standards and norms, and jointly engage third countries in technical assistance aligned with sustainable, transparent, and inclusive governance practices.

5.7 – Multi-Stakeholder Approach

5.7.1 To strengthen trust with local partners and ensure project legitimacy, the EU should engage across all levels of governance, including municipal actors and indigenous institutions such as the Grand Council of Chiefs in Fiji. This is particularly vital in climate-related infrastructure initiatives that may lead to community displacement or require sensitive local adaptation planning.

5.7.2 Institutionalize more regular and structured engagement with European Development Finance Institutions (DFIs), including the EIB and AFD, to address inclusive consultation practices and improve access to Global Gateway funding for local authorities in partner countries. Strengthening this channel can enhance local ownership and the responsiveness of infrastructure programming.

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