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Iliana Olivié y María Santillán O'Shea (coords.)

July 2023

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Summary[1]

This Policy Paper analyses the EU's Global Gateway initiative. Since this is a youthful programme still undergoing construction, the purpose of the exercise is to put forward recommendations for a design and execution geared towards its (1) geostrategic potential and (2) its impact on development, its ability to generate (3) innovative financing and (4) a greater and tighter coherence in initiatives and coordination among its stakeholders. To this end, its challenges and opportunities are explored in these four dimensions, both for the initiative in general and for official Spanish aid policy and the Spanish private sector. These same challenges and opportunities are also viewed through the lens of two specific projects in the fields of climate transition (a hydrogen project in Chile) and digital connectivity (the Bella programme).

The challenges lying in the way of Global Gateway's success are manifold and of various kinds. Just three examples are: (1) striking the perennially delicate balance between impact on development and the profitability needed for the intervention of the private sector; (2) managing strictly rules-based but slow processes in the EU institutions; and (3) incorporating partner countries' development priorities more broadly and effectively. This joint paper, which benefits from the input of an already extensive literature on the project and the opinions of some 20 interviewees, enables a series of recommendations to be put forward, compiled at the end of the document. These recommendations revolve firstly around the governance of the strategy, referring to possible improvements in its flexibility, its intermediate decision-making levels, the clarity and transparency of its processes (including those related to the participation of its various stakeholders), and the need to coordinate and bear in mind other initiatives that could overlap with this one (both European and external), and the balance between flexibility and guarantees in the execution process. Secondly, with the initiative's impact on development in mind, greater alignment is recommended with the EU's development priorities, in particular the social objectives, something that also has a bearing upon private participation, such that it features transparent evaluation mechanisms and ways of involving the local private sector, thereby fostering the EU's image as an all-round donor. Thirdly, greater involvement on the part of the member states is recommended, using –for instance– contact rounds and the formalisation of processes, on the part of partner countries and other stakeholders such as civil society organisations. Lastly, it is recommended that communication surrounding the initiative is improved, bringing efforts into line with perceived shortcomings and favouring a narrative that is realistic regarding the tool's potential, emphasising its collaborative –rather than competitive or reactive– character compared with other global players such as China.

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Introduction

The EU spends almost €70 billion annually on aid to some 150 developing countries, which accounts for around half of the OECD's official development assistance (ODA) and makes the Union the largest donor worldwide.

Despite the crises of recent decades, the aid given by traditional donors (or the OECD) has kept up a steady rate of growth, surpassing historical records every year. Added to this are the redoubled efforts of the (misnamed) emerging donors, notably China.

In parallel, the global development agenda has shifted from a rather technical and technocratic perspective on development aid, focused on achieving a series of local-level social goals (specified in the Aid Effectiveness Agenda and in the Millennium Development Goals) to another, broader perspective that acknowledges the challenges of development in all their breadth and complexity, expanding their scope to the economic, climate, environmental, political, institutional and security dimensions (all of which are given explicit manifestation in Agenda 2030).

Thus, both traditional and emerging development aid are increasing while the challenges and goals of development are multiplying. The necessity of supplying a development financing agenda that transitions 'from billions to trillions' is giving way to the creation and strengthening of mechanisms and instruments that increase public (refundable aid, blending) and private development funding (guarantees, public-private partnerships for sustainable development).

Development aid and cooperation form the flagship of the EU's external projection, which, governed as it is by a self-styled 'Geopolitical Commission', puts in place a series of processes geared firstly towards the de facto 'communitisation' of European aid (the disappearance of non-budgetary tools such as the EDF, the creation of NDICI-Global Europe, Team Europe, delegated cooperation) and secondly towards increasing the scale, thematic (digital, climate, transport, education, health and research) and strategic scope (partly in response to China's BRI) of development initiatives, something that the Global Gateway initiative is turning into reality.

The Global Gateway strategy has been criticised for its lack of ambition, in the sense that it is largely limited to repackaging pre-existing initiatives. However, if it is possible with a mere 'repackaging' to lend internal coherence and strategy to an official development assistance programme that, for example, is 10 times greater than its Chinese equivalent, the impact in terms of development and the EU's external influence may be considerable. Moreover, this initiative relies on the new European NDICI-Global Europe instrument, which already represents a significant change with regard to the ambition of European cooperation policy.

The Global Gateway is thus destined to transform European development aid and with it, at least partly, that of its member states, bearing in mind moreover its potential 'communitisation' effect. The implications for the Spanish private sector and for the Spanish aid programme are manifold, in as much as it affects their financial cooperation tool and the private sector's ways of participating in development initiatives, this coming at a critical time in the reform of development cooperation.

The following section describes the Global Gateway initiative in the context of European aid undergoing transformation and as a response to the China's BRI. The second section reviews the challenges and opportunities of the Global Gateway in terms of its impact on development, geostrategic potential, capacity for financial innovation and the EU's internal coherence and coordination. The third section places the focus on the same challenges and opportunities for the specific cases of an energy transition project (hydrogen in Chile) and a digital connectivity project (Bella). The last section offers a series of recommendations relating to the governance of the strategy, its impact on development, its ownership by all the stakeholders and its communication efforts.

1 What is the Global Gateway?

1.1. The EU's development cooperation

Recent years have seen a tendency towards the integration and geopoliticisation of European development cooperation, with development objectives gradually being incorporated into other foreign policy objectives (Olivié & Santillán, 2021). This approach thereby converges with the one adopted by other development actors, and it aligns with some member states' cooperation activities more than others, such as the financial cooperation of France and Germany. This evolution, reflected by the breadth of the various objectives included in the 2017 New Development Consensus, is particularly evident in the adoption in 2021 of Global Europe and the Neighbourhood, Development and International Cooperation Instrument (NDICI) (*ibid*).

This instrument, responsible for financing and executing the EU's development activities over the 2021-27 financial cycle, absorbs the mandates of various previous instruments into a single tool. These include, among others, the European Development Fund, aimed at countries in Africa, the Caribbean and Pacific (ACP) and Overseas Countries and Territories (OCTs), which had the exceptional characteristic of being financed outside the budget (now something that only applies to the OCTs); the European Neighbourhood Instrument; the Financing Instrument for Development Cooperation, which channels aid towards Asia, Central Asia, the Middle East, Latin America and South Africa; and the Instrument contributing to Stability and Peace (European Commission, 2018).

The Global Europe-NDICI instrument additionally has a European Fund for Sustainable Development Plus (EFSD+), successor to the European Fund for Sustainable Development (EFSD), which provides financial support to development investments throughout the world. Lastly, the EFSD+ is accompanied by an External Action Guarantee, which absorbs the European Investment Bank's external loans mandate (*ibid*).

The unification of all these instruments into Global Europe-NDICI gives this new instrument a much broader geographical and thematic outlook, as well as a mandate that exceeds the traditional development objectives, such as the eradication of poverty, and includes geopolitical and security notions such as stability and peace (European Parliament and Council, 2021). As well as in the breadth of objectives, the geopolitical focus of European cooperation is reflected in the weight that the Neighbourhood acquires in this context. The NDICI regulations include a series of specific provisions for neighbourhood issues, which include controlling migratory flows and the earmarking of relatively considerable funds to this issue (€19 billion, the second highest amount after the €29 billion assigned to the whole of Sub-Saharan Africa) (*ibid*).

A final manifestation of the integration and geopoliticisation of aid is in its financing. With the Global Europe-NDICI instrument also absorbing the former EDF, European development cooperation is now financed entirely be EU budgets, thereby assigning a greater role to the

European Commission (dubbed the 'Geopolitical Commission' by President von der Leyen) (Olivié & Santillán, 2021) and, to a certain extent, to the European Parliament (Burni *et al.*, 2021). Moreover, its €79.5 billion (European Parliament and Council, 2021) exceeds the total sums assigned to the previous instruments, despite not including the UK's contribution, indicating the growing importance being placed on the EU's external projection.

At the same time, efforts to make the EU's external and development action more coherent and integrated (especially in the wake of the need to join forces in response to the COVID-19 pandemic) led to the adoption in 2020 of the so-called Team Europe approach to European cooperation (European Commission, nd-b). This is an attempt to enhance the EU's visibility in the world as an actor, if not as monolithic, then with internal coherence and with closer and more effective collaboration among its members, and to present itself as such to its external partners (*ibid*).

Thus the recent evolution of the EU's development cooperation policy encompasses the latter and the rest of European foreign policy within a single vision and strategy, thereby combining their objectives, stakeholders, power dynamics and impact.

1.2. Global Gateway

In this geostrategic context, accentuated moreover by the impact of the pandemic on development and the mere seven years that remain until 2030 –the deadline for meeting the Sustainable Development Goals– the Global Gateway initiative has emerged. It was announced by the President of the European Commission, Ursula Von der Leyen, in September 2021 as a tool for responding to the need for 'sustainable and trusted connections that work for people and the planet' (European Commission, 2021b). In other words, the Global Gateway seeks to promote the EU's external action in the areas of connectivity and infrastructure, and seeks to attain this objective by mobilising an investment of €300 billion in the digital, climate and energy, transport, health, education and research sectors (*ibid*).

It is important to emphasise that the Global Gateway is an exercise for boosting the visibility, image and coherence of the EU's external action through its international cooperation, which is presented as a 'positive offer' for its partners on the grounds that it carries a series of advantages such as its sustainability and its regulatory focus (European Commission, 2021a). In line with this focus, the initiative will officially rest on six principles: democratic values and high standards; good governance and transparency; equal partnerships; green and clean; security focused; and catalysing private sector investment (European Commission, 2021b).

With this, according to von der Leyen herself, the EU aspires to underpin its role in the world order, thereby responding to the rise in the worldwide presence of China especially in sectors related to infrastructure and digital connections, as will transpire in what follows (Pandita, 2023). Therefore, the Global Gateway initiative does not entail a new package of financing but rather clarifies, unifies and coordinates European external action, financed by means of already-existing funds and instruments, using a Team Europe approach (European Commission, 2022b).

The mobilisation of resources that has been announced thus refers to funds that will come first from the Global Europe-NDICI instrument and its EFSD+ and External Action Guarantee. In addition, financing is envisaged from other instruments such as the Instrument for Pre-Accession Assistance III, Interreg, InvestEU and Horizon Europe, as well as those funds that each member state's cooperation can mobilise through combined financing (*ibid*). Lastly, the possible creation of a European Export Credit Agency is also being contemplated to boost the competitiveness of European companies in partner countries (Szczepański, 2023), although for now there has been no tangible progress on this proposal.

At all events, getting the strategy under way has been a slow affair. Initially it was decided to include a series of European projects in Global Gateway that would serve as flagbearers and foster the EU's visibility on the ground and in the eyes of its partners. This first selection includes projects such as the Medusa fibre optic cable for connecting Europe and North Africa, the extension of the BELLA fibre optic cable between Europe and Central America and the Caribbean, the Trans-Balkan Electricity Corridor in eastern Europe, the green hydrogen and critical raw materials partnerships with Namibia and Kazakhstan and the green hydrogen partnership with Egypt, among others (Guerrero, 2022); more projects were subsequently added to this selection (Grupo Spri, 2023).

1.3. The Global Gateway and the Belt and Road Initiative

When it was announced in 2013, the Belt and Road Initiative (BRI) reflected various Chinese interests, notably the search for new markets for sectors with obvious overcapacity, such as construction, and enhancing its geopolitical and regulatory influence. Its rapid spread, covering virtually the entire planet, despite having originally been conceived for Eurasia, is due to the fact that there was an enormous demand for infrastructure financing that was not being satisfied by traditional actors.

The BRI has been in decline since a flurry of investments and diplomatic activity in 2016-2017, coinciding with the first Belt and Road Forum for International Cooperation. After a second forum in 2019 and the emergence of COVID-19, China's political leadership has downgraded its visibility, as is evident from the drastically reduced mentions in Xi Jinping's speeches (Chen, 2022), and the downgrading of the biennial forum in 2021 to a ministerial-level meeting. With its initial impetus having passed, the BRI has stalled and it remains to be seen whether a third forum to be held in 2023, on its 10th anniversary, will lend any fresh impetus. The size of an eventual resuscitation of the BRI appears limited because the appetite for the initiative, both inside and outside China, has waned.

Partner countries with memoranda of understanding on the BRI have been left disappointed, and they face debt problems accentuated by the COVID crisis. This is linked to regulatory problems with the initiative, such as its lack of transparency. Notable too is the traditionally semi- or non-concessional Chinese approach –accounting for 81% of its development financing prior to 2017 (Malik *et al*., 2021, p. 13)– and the ratio of loans to donations (the former outweighing the latter by factors of up to 31 to 1), and the fact that Chinese projects have significantly contributed to the foreign debt of countries such as Djibouti, Angola, Laos, the Maldives, Mongolia (Buchholz, 2023), and Montenegro (Hurley *et al*., 2018, p. 18). It has also been evident how the resistance of local communities can scupper projects that do not fulfil the appropriate regulatory or social and environmental sustainability standards, witness among others the legal suspension –followed by a permanent cancellation– of the first coal-fired power plant in Kenya (Yi, 2021) with more than US$1 billion of Chinese financing. More generally, it is estimated that up to 2021, 35% of projects in the BRI portfolio (Malik *et al.*, 2021, p. 13) faced serious implementation problems, including public protests, corruption scandals, breaches of employment law and environmental problems; these are problems that, as will be set out below, the Global Gateway should be sure to avoid. Moreover, many of these projects have been of doubtful profitability for China, where the authorities have become less keen to finance grand infrastructure projects and more assiduous about managing the economic and reputational risks arising when they fail.[2] This has led to a plethora of official strategies being published geared towards transforming the BRI into a more sustainable initiative with projects of higher quality.[3] The Chinese authorities also believe that we are facing an international context of growing geopolitical risk, which is inconducive to investments in large infrastructure projects and requires the prioritising of greater industrial and technological autonomy on the part of China.

A clear example of the reduced level of ambition in infrastructure projects financed by China is the Brazil-Bolivia-Peru Bi-Oceanic Corridor. This grandiose project is now viewed from a more modest perspective, focused on the gradual development of infrastructure at the national level whenever possible, and postponing intra-regional connectivity to a time when more favourable political circumstances may prevail. The South American case highlights the limits of a vertical approach –based on agreements with central governments– when it comes to implementing projects, given the difficulty of striking an agreement with all the interested parties, including sub-national governments and local communities (Gong, 2023). The emphasis of the BRI has shifted from traditional large infrastructure towards small projects or projects linked to the digital and green transitions, and from loans to investments. This shift is not unrelated to the pressure of international norms and standards and also reflects the influence of recipient countries. Cases involving the cancellation of mega-projects (Berger, 2018), as in Malaysia (Zainuddin, 2021), or the renegotiation of debts and guarantees (Griffin, 2022), as in Ecuador (de la Torre *et al.*, 2022), suggest a willingness on the side of partner countries to redefine asymmetrical relations with China, while simultaneously offering the latter the chance of resetting the way its projects are undertaken.

Meanwhile, in September 2021 China launched its Global Development Initiative (GDI) to bolster its international profile as a provider of development aid. Although it remains to be finalised, this new initiative is already supported by more than 60 countries within the

2 Prior to the pandemic, data from the American Enterprise Institute suggested that the BRI had accumulated up to US$100 of dubious assets (one quarter of the world total since 2005) (OECD, 2018, p. 29). This is combined with an explosion, 60% of their portfolio of international loans (Lu, 2023), in countries with debt crises in 2022, and more than US$200 billion in financial bailouts since 2016 –a fifth of the total payment commitments of the BRI (Douglas, 2023)–.

3 These include: Vision and Actions on Jointly Building Silk Road Economic Belt and 21st Century Maritime Silk Road (2015), Green Development Directives for Overseas Investment and Cooperation (2020), and the Guidelines for the Ecological Environmental Protection of Foreign Investment Cooperation and Construction Projects (2022). This is combined with the foreign investment target of the 14th Five-Year Plan being 25% lower than the preceding period (2016-20) (Wang, 2022, p. 21).

framework of the Group of Friends of the GDI at the United Nations (Ministry of Foreign Affairs of the People's Republic of China, 2022). This has been launched in parallel and as a complementary initiative to the BRI; while the latter has a more market-oriented approach in which private participation is foremost, the GDI is closer to the 'traditional' focus on development cooperation (Mulakala, 2022). Financially, the GDI is financed with aid funds through the China International Development Cooperation Agency (CIDCA) and from Chinese contributions to international programmes and initiatives (Ha, 2023). Thematically, its eight cooperation priorities are: mitigation of poverty, food security, response to COVID-19 and vaccines, financing for development, climate change and ecological development, industrialisation, the digital economy and connectivity (Permanent Mission of the People's Republic of China to the UN, 2022).[4]

In any event, and despite the fact that China takes part in the G20's common framework for debt treatment (Wei, 2022), significant contrasts continue to exist between the EU and China in this field. A clear example is the lack of transparency in Chinese development financing. It is estimated that unreported Chinese debt in low- and medium-income countries under the World Bank Debtor Reporting System has reached US$385 billion (Malik *et al.*, 2021, p. 57), almost half the debt officially registered under that system. The BRI will also continue to diverge from European development financing if the European intention to finance only projects compatible with global warming limited to 1.5 degrees becomes reality (GIZ, 2022, p. 2), which excludes the possibility of any investment in fossil fuels (Evans, 2022). Although the investment in renewables has increased in absolute and relative terms, fossil fuels still constitute more than half of the total contracts and investment volumes in energy under the Chinese initiative (Wang, 2023). Moreover, despite the ban on financing coal-fired plants outside China, imposed in 2021 (Wang, 2022, p. 13), the participation of Chinese companies and possible Chinese financial and technical support for projects involving coalmines and coal-fired plants was observed in 2022.[5] More significant still is that, through the GDI, China underpins its adoption of a proactive stance to legitimise a model of development that is decoupled from governance and from individual, civil and political rights (Lemoine & Gaafar, 2022).

In this context the launch of the EU's Global Gateway has been overwhelmingly reactive to the geopolitical and regulatory challenges that the BRI represents and the concern it causes in terms of sustainability, including the participating countries' level of indebtedness. This concern is shared by the EU's partners, which have launched similar initiatives such as Build Back Better and with which bilateral and mini-lateral platforms have been set up such as the Partnership for Global Infrastructure and Investment or the EU-Japan Partnership on Sustainable Connectivity and Quality Infrastructure (Esteban & Armanini, 2020). With more than US$1 trillion in payment commitments, the BRI will remain the largest connectivity initiative, but its current flows of new financing, set at around US$60-70 billion per annum (Wang, 2022, p. 5; Wang, 2023, p. 5), are similar to the value of European development aid.

4 The last three areas overlap with the BRI's sphere of activity.

5 In Indonesia (Wang, 2023, p. 13), the China Energy Engineering Corporation won the tender to build a 1.5 GW power plant on the island of Obira, while the Power Construction Corporation will be involved in a mining project in the province of Central Borneo. In Pakistan, financial and technical support is expected for the construction of coal-fired plants in Gwadar.

Moreover, the Global Gateway could benefit from a competitive advantage by mobilising more private capital, because its technical cooperation allows, among many other things, the key attraction of capital in the planning stage of projects; and by incorporating the European Investment Bank (EIB), the European Bank for Reconstruction and Development (EBRD) as well as national development banks.

2 The challenges and opportunities of the Global Gateway

Since its launch in December 2021, the Global Gateway initiative has generated both positive and negative reactions and certain expectations. There remains a series of unknown factors regarding the initiative, which are related to each other and to the success and scope of the Global Gateway. These are set out below on the basis of: an exhaustive bibliographical review; 12 semi-structured interviews with people linked to administrations, the private sector and think tanks; and the contributions collected during a meeting of stakeholders from the main sectors involved, which was held at the Elcano Royal Institute's headquarters in May 2023. While this section contains general challenges and opportunities for the initiative, it also includes specific challenges and windows of opportunity for Spain's development cooperation and for the Spanish private sector, where applicable.

2.1. Impact on development

One of the most striking aspects of the Global Gateway's possible impact on development is the apparent contradiction between the initiative's ambition, which seeks to encompass all of the EU's external action far beyond development cooperation, and its channels, given that up until now it seems fundamentally to rely on the budgetary allocations and instruments of ODA (Bilal, 2022; Karaki *et al.*, 2022). This may, in turn, be interpreted as either a challenge or an opportunity.

On the one hand, it is thought that this integration of development cooperation into the rest of the EU's activities may amplify the attention paid to development and, if it manages to mobilise the additional (private) financing being hoped for, its resources too. At least three elements are identified in this respect that could maximise the impact of the Global Gateway on development. First, EU cooperation (and that of its member states) holds a series of comparative advantages over China, which the key Global Gateway projects may help to publicise and strengthen. Chinese cooperation is sometimes criticised for perpetuating the dependency of developing countries by aggravating their indebtedness (Ferrándiz, 2021; Tagliapietra, 2021), something that European cooperation manages to avoid, at least to some extent, through the combination of loans with subsidies and guarantees (*ibid.*), and by means of technical assistance that contributes to the sustainability of the projects, as well as steering them towards development outcomes (*ibid.*).

Secondly, the mobilisation of a greater volume of private finance through public resources that is expected to be achieved with the Global Gateway would increase investment in connectivity projects. This could have ramifications on economic growth, resilience and supply chain efficiency (Szczepański, 2023), which would contribute to the attainment of various Sustainable Development Goals (SDGs). Indeed, according to some sources, from the point of view of the priorities of the member states' cooperation programmes, the Global Gateway could not only strengthen the indirect effects of such economic growth on development but could even extend as far as meeting needs that had not been covered by other instruments.

Moreover, according to some studies, the Global Gateway could facilitate the export of European values and priorities (Okano-Heijmans, 2022; Moreschi, 2021), the green agenda being a case in point (Tagliapietra, 2021). Specifically, and in line with its strong presence in and prioritisation of Latin American and the Caribbean by Spanish development cooperation and the Spanish private sector, this tool could strengthen the interest of other member states (including the private sector and civil society) in the region. According to one of the interviewees with private sector links, business sustainability would thereby be strengthened in the region and all of them would be reinforced as development stakeholders, although such expectations would need to be balanced against the EU's priority focus in Africa. If fact, if well deployed, the Global Gateway would be a particularly suitable tool for the region's economic and social conditions (Melguizo & Torreblanca, 2023), and its approach would contribute to strengthening the local private sector to a greater extent than other instruments.

However, while such elements may constitute the initiative's strengths, they need to be viewed in conjunction with one of the main challenges it faces, namely that it needs to demonstrate additionality, as will be discussed below.

In contrast to all the above, the combination of development instruments with broader political objectives, while it reflects in part the complexity of the current international situation and its trends, also raises concerns about a possible diversion of attention and development resources towards geopolitical interests and goals that are more aligned with the private sector's economic and commercial ambitions than with European development priorities and values (Bilal, 2022; Karaki *et al.*, 2022; Sial & Sol, 2022; Furness & Keijzer, 2022; Teevan *et al.*, 2022; Koch *et al.*, 2023) or with the various members states' cooperation programmes. As well as infringing the partners' democratic ownership by not involving them in setting priorities (Sial & Sol, 2022; Furness & Keijzer, 2022; Colnaghi, 2021), the vague mandate of the Global Gateway could lead to the instrumentalisation of European development cooperation (Sial & Sol, 2022; Furness & Keijzer, 2022). This would particularly be the case if cooperation resources ended up being assigned to contexts with more favourable investment climates but not necessarily with greater needs, or even if they were used as a risk reduction mechanism to promote private competition against its Chinese counterpart (Sial & Sol, 2022). In such cases there may be a trade-off between the highly-needed participation of the private sector (given its potential contribution to development in such areas as technology) and its eventual impact on development, if its activities were not entirely aligned with the sustainable development goals and its *ex ante* and *ex post* assessment tools turned out not to work properly.

This delicate balance may be evident in the transition there has been, stemming from this initiative, from talking about investment 'packages' to investment 'agendas'. This more ambiguous approach runs the risk of diluting elements that are key to the development impact of member states' cooperation programmes and specifically of Spain's cooperation programme, such as the development of regulatory frameworks.

All this tends to exacerbate the risk of explicitly linking aid to commercial interests and even implementing them in authoritarian contexts and/or contexts that the breach human rights or environmental criteria advocated by the EU (Karaki *et al.*, 2022; Sial & Sol, 2022; Furness & Keijzer, 2022; Koch *et al.*, 2023). It is for this reason that one of the greatest challenges to the Global Gateway's impact on development is that of involving distinct stakeholders and complementing all the perspectives, preserving European values and decades' worth of heritage in terms of the efficacy of aid, both in activities with partner countries and in the financing of private companies (Teevan & Domingo, 2022; Teevan *et al.*, 2022; BusinessEurope, 2021). Indeed, as the definition of this initiative becomes clearer, there is concern about the marginal way in which development goals with the most social content, which are a priority and emblematic for the Spanish cooperation programme, are included, as well as the possibility that this marginality in the definition is transferred to European cooperation practice and ends up evolving from a 'policy first' focus to one of 'investment first'. Added to these concerns is the lack of clarity and transparency perceived in the European Commission's communication, both in general and directed towards the members states in particular, regarding how it intends to tackle these risks (Sial & Sol, 2022).

In any event, as has already been mentioned, a major challenge that moreover permeates throughout the Global Gateway is that of additionality, something that has to be explained to justify the use of public ODA funds for the mobilisation of private resources through the Global Gateway (*ibid.*, Furness & Keijzer, 2022). In other words, it needs to be shown how the impact of the investment on development will be affected once the public support via the Global Gateway has been added, compared to what there would have been without it, also bearing in mind other countries' development initiatives. For now, there is an absence of detail about how such additionality will be assessed, given the lack of clarity about the plan to monitor and evaluate the strategy (*ibid.*, Buhigas Schubert & Costa, 2023). This lack of defined methodology –conceptually and operationally– for the monitoring of resources channelled through the Global Gateway also represents a concern for the member states, since they have no detailed knowledge of the real impact that the funds to be mobilised will have. The additionality is thus particularly questioned in the context of an initiative that reframes pre-existing funds, without supplying new financing (Pandita, 2023).

The impact that the Global Gateway has on development will be determined by the way these challenges are overcome. In fact, it is important to bear in mind that the challenges to the impact on development, to the geostrategic potential, to the mobilisation of innovative financing and to coherence will be closely related to each other, to the extent that the overall success of the strategy will all depend on all of them. So, for example, unless people can be persuaded of the strategic added value of taking part in the Global Gateway, private involvement may be disincentivised, which in turn will diminish the volume of resources available for development cooperation, and this, again, will negatively affect the EU's geostrategic credibility.

Figure 1. Summary of the challenges and opportunities for the Global Gateway's impact on development

Impact on development	
Challenges	**Opportunities**
Diversion of development resources towards geo-strategic and commercial ends: • Instrumentalisation of aid for private interests • Values and efficacy undermined • Implicitly tied aid Less ownership by partners Additionality Communication (internal and external) on all the above points	Greater attention given to development Greater leverage of the comparative advantages of European cooperation against that of China Greater mobilisation of public and private resources and corresponding impact on development Export of European development priorities (eg, the green agenda)

Source: the author.

2.2. Geostrategic potential

The various analyses and speculations about the Global Gateway converge on the same starting point: fundamentally it is a geostrategic instrument motivated, as mentioned above, by the rise of Chinese influence in the world and especially in the world of development. So, inasmuch as it responds to the Belt and Road Initiative, there seems to be a certain consensus with regard to the geostrategic potential the strategy may encapsulate, the evolution of which remains to be seen.

Despite the confusion and scepticism initially stemming from the fact that the initiative does not bring in new resources but rather restricts itself to re-labelling the existing ones, a series of opportunities is now being identified arising from this rebranding exercise that may bolster the EU's image and presence in the world (Tagliapietra, 2021). The first is that the Global Gateway, particularly at first by means of its flagship projects, can boost the EU's visibility as a partner and ally for developing countries (Lau & Moens, 2022; Jorge Ricart & Otero Iglesias, 2022), as well as the value of its external action (Buhigas Schubert & Costa, 2023) and the comparative advantages of its development cooperation relative to that of China (its greater quality and sustainability and its focus on advocating human rights and the rule of law) (Bilal, 2022; Tagliapietra, 2021; Melguizo & Torreblanca, 2023), provided that the respective dialogues of policies and institutional alliances are maintained, thereby avoiding transactionalism in investment agendas, particularly in the current context of a possible slow-down in Chinese foreign investments (Lau & Moens, 2022).

The Global Gateway could thus constitute an engine for the EU's foreign policy and its private sector, something that would enable it to export its values and interests, including among the latter those related to security (Jorge Ricart & Otero Iglesias, 2022), access to raw materials markets (Biscop, 2022), the export of its industrial policy (Tagliapietra, 2021; Okano-Heijmans, 2022) and its positioning in the global infrastructure and connectivity race (Tagliapietra, 2021; Moreschi, 2021). Moreover, this same rebranding exercise could represent greater strategic leveraging of ODA spending –the largest in the world– enhancing its visibility and reducing the fragmentation of aid between the various member states (Tagliapietra, 2021; Jorge Ricart & Otero Iglesias, 2022). In this regard, various interviewees agree that the Spanish presence in the Council of the EU in the second half of this year represents an opportunity for ensuring that Spanish impetus and initiative contribute to consolidating this strategy.

Some analysts also argue that the Global Gateway could represent an opportunity to secure closer cooperation with other global actors, such as the US (Sacks, 2021; Szlapek-Sewillo, 2021), and thereby contribute to maintaining the world order, currently shaken by the Russian aggression in Ukraine (Biscop, 2022). Lastly, the initiative is furnished with a series of instruments that, well used, could ensure the strategic impact of the Global Gateway, such as the Business Advisory Group, which forms part of its governance (Bilal, 2022), or, according to some analysts, the possible creation of a European Credit and Export Agency (Teevan & Domingo, 2022).

Doubts still remain, however, about the Global Gateway's capacity to achieve the expected impact in terms of presence in the world and competition with China, and these are related to its vision and communication. There is a lack of clarity and definition in the way the initiative is communicated by the European Commission, and this affects various aspects such as: its exact goals (Furness & Keijzer, 2022); the order of priorities (*ibid.*); why, how and to what end it is proposed to rival China (*ibid.*; Pandita, 2023); the way in which goals are to be attained without additional funding (*ibid.*; Koch *et al.*, 2023); what comprises the 'positive offer' that is to be made to partner countries (Sial & Sol, 2022; Teevan & Domingo, 2022); the progress made by the initiative to date (Buhigas Schubert & Costa, 2023); and the value that the Global Gateway adds to pre-existing instruments (Global Europe-NDICI, EFSD+, TEI) without duplications and overlaps being created (which is related to the challenge of additionality, mentioned above) (Bilal, 2022; Jorge Ricart & Otero Iglesias, 2022). Moreover, some interviewees mentioned that the initiative's internal communication is unclear with regard to the selection processes and criteria for projects, in terms of the alignment –technical and narrative– of the Global Gateway with the Team Europe approach and initiatives, and in terms of the role of technical cooperation in such initiatives. This lack of detail makes it more difficult to identify the specific contribution that the member states can make to the Global Gateway, and in particular the Spanish cooperation programme and the Spanish private sector; and it also generates uncertainty as to whether the various member states actually understand the initiative in the same way.

An important challenge that the Global Gateway must therefore confront is clearly communicating what the strategic vision of the initiative is, both internally –to the member states, to the European private sector and the European financial institutions– and to its partners –developing countries' governments, their private sectors and the local populations and financing bodies (Bilal, 2022; Colnaghi, 2021; BusinessEurope, 2021)–. Effective communication of the strategy's added value would, moreover, help to alleviate possible tensions generated by the additional transaction and coordination costs incurred by the member states as part of this initiative. The success of all of this will partly determine whether the desired internal coherence is attained, something that is addressed below.

In order to communicate a strategic vision –or 'offer'– clearly, however, it is first of all essential to have one, and the confusion in the communication of the initiative gives rise to doubts about its degree of maturity and its capacity to attract the EU's partners. Part of the strategic challenge will thus consist of defining and displaying this offer (Teevan & Domingo, 2022), which will need to meet at least five requirements.

First, it should be capable of emphasising the added value of technical European cooperation (Teevan *et al.*, 2022), as has already been mentioned, given that it is unlikely to be able to compete with China and other donors in aspects such as the volume of investments and experience in the digital arena (Ferrándiz, 2021; Armanini & Esteban, 2022). In this respect, it is important that the Global Gateway is perceived as a strong and clear stance of the EU and its member states with its own instruments in the world, and not as a mere response to China, with which the slowness of the European processes prevent it from competing on major infrastructure projects, for example. Hence it will be essential that the visibility the Global Gateway's flagship projects lend to the EU is defined with clarity but does not conceal the rest of the EU's and its member states' integrated development efforts in distinct geographical and sectoral arenas, but instead is used in a coherent and coordinated way with the rest of the EU´s cooperation tools.

Secondly, emphasis should be placed on the regulatory and values-based aspect of European cooperation as something positive and distinctive (Tagliapietra, 2021) and not as a sort of implicit conditionality (Teevan & Domingo, 2022; Chengyu, 2022).

Thirdly, it will need to be capable of incorporating the needs and priorities of partners, duly consulted, such that it helps to ease the EU's reputational problems, especially in Africa (Teevan & Domingo, 2022; Teevan *et al.*, 2022; Pilling, 2022; Koch *et al.*, 2023), and so it contributes to the construction of horizontal alliances based on dialogue with the partner countries.

Fourthly, it will need to incentivise the involvement of the private sector, the finance sector and entrepreneurs (Karaki *et al.*, 2022; Teevan & Domingo, 2022; Bilal, 2022), and lastly it will need to do all this by employing a Team Europe approach (Teevan & Domingo, 2022) that underpins alliances with partners in the multilateral system (Jorge Ricart & Otero Iglesias, 2022).

Both the strategic definition of the Global Gateway's vision or "offer" and its effective communication will require equally efficient governance (*ibid.*; Gavas & Pleeck, 2021; Buhigas Schubert & Costa, 2023), equipped with mechanisms to somehow incorporate the experience and contributions of the various actors who make up the European architecture of development cooperation. As well as taking advantage of the strategic potential of the Business Advisory Group (Karaki *et al.*, 2022) mentioned above, and easing possible doubts about the effectiveness of a group with 60 members, this will also require addressing the current lack of clarity in terms of the institutional leadership of the initiative (Buhigas Schubert & Costa, 2023), although headway has recently been made on this aspect. While the ambition of the Global Gateway is to achieve a projection that goes well beyond that of development cooperation (Bilal, 2022), the leadership currently resides with DG INTPA, which is fundamentally devoted to official development assistance, simultaneously excluding certain key actors in development such as civil society representatives, as some interviewees pointed out.

Again, the strategic impact of the Global Gateway will be inevitably linked to the success it achieves in other areas, such as its impact on development, its capacity for innovative financing and its coherence. For example, the participation of the private sector in development activities in a coordinated and coherent fashion will be essential for the strategic credibility and visibility of the initiative.

Figure 2. Summary of the challenges and opportunities for the Global Gateway's geostrategic potential

Geostrategic potential	
Challenges	**Opportunities**
Lack of clarity and definition in the communication of goals, plan, added value and processes: • Internally • When addressing partners Doubts about the strategic vision: • That it emphasises the technical added value of European cooperation • That it sets out European values as a positive element • That it incorporates partners' needs and priorities and contributes to a horizontal approach • That it incentivises private involvement • That it pursues a Team Europe approach Lack of clarity about the leadership and establishment of effective governance	Greater foreign visibility and projection for the EU and for its comparative advantages as an ally Export of the EU's interests and its private sector: • In security, access to markets, industrial policy, positioning on connectivity and infrastructure Strategic leveraging of the largest ODA in the world, reducing fragmentations Greater collaboration with other global players, such as the US and Japan Potential of instruments such as the Business Advisory Group and the possible creation of a European Export Credit Agency

Source: the authors.

2.3. Innovative financing

One of the main reservations about this initiative concerns its capacity to mobilise the volume of expected financing (Szczepański, 2023; Bilal, 2022; Armanini & Esteban, 2022; Sacks, 2021), on which it relies in order to meet its commitments and goals, both geopolitical and in terms of impact on development.

According to various analysts there are reasons for thinking that the strategy's financing goals, while ambitious, are also feasible (Furness & Keijzer, 2022; Ferrándiz, 2021; Tagliapietra, 2021). These include past experiences in which the EU has managed to involve development banks and private financing institutions in mobilising resources (Furness & Keijzer, 2022); the existence of part of the funds in the Global Europe-NDICI instrument that are yet to be assigned (*ibid.*); the EU budget review due to take place this year (Koch *et al.*, 2023); and the funds that each member state can mobilise through combined financing, in line with the Team Europe approach (Szczepański, 2023; Furness & Keijzer, 2022).

It follows that this rebranding of the EU's foreign and development policy under the Global Gateway initiative, if it is conveyed appropriately and effectively, could represent a more definite and solid participation on the part of the private sector in the strategic orientation of the EU's investments in development, especially through its contributions to the Business Advisory Group (Bilal, 2022; Karaki *et al.*, 2022; Teevan *et al.*, 2022). This would also achieve greater strategic leveraging of the private presence that already exists in the EU's foreign investments (Karaki *et al.*, 2022), and could attract even more private participation by devoting resources to geographical and sectoral areas where companies from the various member states are already competitive.

On the other hand, and despite the opportunities implicit in all the foregoing, one of the concerns most frequently raised in conversations about the Global Gateway continues to be its doubtful capacity, as some see it, to mobilise the promised funds (Sial & Sol, 2022; Gavas & Pleeck, 2021). The EU faces the challenge of not only attracting the public development banks and the development financing institutions but also institutions such as the national export credit agencies (Karaki *et al.*, 2022), in line with the Team Europe approach and in a coordinated and coherent way (Bilal, 2022; Sacks, 2021), duly overcoming the differences of times, processes and even mandates (oriented towards commercial profit or development) between the various types of actor. The EFSD+ and the External Action Guarantee should serve for this purpose, but it will also be necessary to capitalise other instruments and types of financing, such as public-private partnerships and support for SMEs (Bilal, 2022; Karaki *et al.*, 2022), thereby ensuring that the financing opportunities presented by the Global Gateway do not focus exclusively on a limited group of large companies.

Promoting private participation in this way will require prior pinpointing of the private sector's interests, both in the EU itself and in the partner countries (Bilal, 2022; Teevan & Domingo, 2022), as well as the added value that participation in the Global Gateway can represent for member states' companies that are already present in the partner countries; while always preserving the development principles and goals (Bilal, 2022). In line with the points alluded to above, in order to generate interest and trust in the private sector there will also be a need for clear definition and communication of what the initiative's goals are, how it is planned to achieve them with the existing funds (Pandita, 2023; Koch *et al.*, 2023) and what proportion of the resources are expected to be provided by the member states, given that the lack of conviction and sense of ownership on the part of the latter would negatively affect the mobilisation of the funds that are expected from each of them. In keeping with this, some interviewees also pointed out the additional reputational risk that failing to mobilise the promised financing would represent in the eyes of partners.

In specific terms, the financing focus of the Global Gateway represents a challenge for the Spanish cooperation programme, which is traditionally more technical, just at a time when the financial aid is undergoing reform with the setting up of a new Spanish Sustainable Development Fund (FEDES), which will replace the former Fund for the Promotion of Development (FONPRODE). Although the capacity to absorb financial aid funding by the Spanish cooperation programme and Spanish private sector may be less than that of other European donors with large portfolios of financial aid and development banks, this also represents an opportunity to align the new FEDES with other European development financing institutions.

Figure 3. Summary of the challenges and opportunities for the innovative financing of the Global Gateway

Innovative financing	
Challenges	**Opportunities**
Doubtful capacity to mobilise sufficient resources Participation of non-development financial entities Capitalisation of various financial instruments Identification of the interests of the private sector, both in Europe and in the partner countries (while preserving the development principles and goals) Effective communication to incentivise this private participation	Feasible ambition to mobilise resources: • Experience of development banks and financial institutions • Resources due to be assigned from Global Europe-NDICI • Mobilisation capacity of each member state Greater participation of the private sector in the EU's development investments: • Greater leveraging of already-existing private participation

Source: the authors.

2.4. Coherence and coordination

Efficient coordination, coherence and complementarity will be essential for the proper functioning and successful implementation of the Global Gateway strategy, especially in light of the many challenges that will need to be overcome. The involvement of all the stakeholders is necessary both for their impact on development and for the capacity to strategically strengthen the EU's image and projection in the world. Indeed, as various analyses argue, the Global Gateway initiative, appropriately executed and with a Team Europe approach, could become the pioneering driver of coherence throughout Europe's external action, and between the latter and its internal action (Furness & Keijzer, 2022; Jorge Ricart & Otero Iglesias, 2022). It could represent the chance to overturn the fragmentations, inefficiencies, gulfs and overlaps between the various member states' cooperation (and financing) programmes and the Commission (Szczepański, 2023), exploiting the comparative advantages of each and thereby enhancing the visibility and the impact on development of European cooperation throughout the world (Bilal, 2022).

This level of coordination requires two major challenges to be overcome, however. The first is securing the acceptance of the Global Gateway's strategic objectives (having been defined and communicated in advance) and their active ownership on the part of the 27 member states (Furness & Keijzer, 2022; Tagliapietra, 2021; Teevan *et al.*, 2022; Lau & Moens, 2022; Moreschi, 2021), overcoming the multiple divergences on the thematic and geographical priorities of their respective development cooperation programmes (BusinessEurope, 2021; Chengyu, 2022). In this regard, some interviewees warned of the risk of the ownership of the initiative being weaker in smaller member states where it is perceived as something imposed by the Commission, which does not include them in the same way as the larger member states.

The second challenge that coordination will need to overcome also involves alignment, this time at the level of practices and processes (Tagliapietra, 2021). Beyond the coordination between member states and the European institutions, the internal coherence of the Global Gateway, which aspires to transcend development cooperation, will depend on coordination with other areas, actors and instruments of European policy, both within and outside the EU (Teevan *et al.*, 2022). This will need to include: the pooling of experience and knowledge in development, financing, foreign policy and investment (*ibid.*); among actors such as the private sector, the financial institutions, various ministers in the member states, diverse levels and departments within the Commission itself, the rest of the European institutions, European civil society, partner governments and the civil society of the South (Okano-Heijmans, 2022); and with various instruments such as Global Europe-NDICI; avoiding overlaps and in fulfilment of the spirit of Team Europe (Teevan *et al.*, 2022).

The interviewees identified at least five examples of challenges, observable in practice, to such complete coordination and coherence. First the level of communication and coordination with the EIB and the EBRD, whose participation and contribution of funds are essential to the success of the Global Gateway, still leaves room for improvement. Secondly, there is an evident lack of an intermediate level to guide work between the high-level determination of strategic priorities and practice on the ground. Thirdly, the problems of institutionality and inclusivity that are found at the European level also have their counterpart at the member state level. Fourthly, the nexus between companies and embassies is often fragile or non-existent and is only created in response to one-off problems or needs. Lastly, it is thought that the Global Gateway could require that EU Delegations in partner countries almost perform the role of embassies, something for which they are not wholly prepared.

Furthermore, all of this incurs another challenge, one that concerns all the arenas explored in this section and was mentioned by some of the interviewees, namely that of time. The coordinated and coherent delivery of results, the demonstration of the impact on development, the mobilisation of resources and the geostrategic evaluation of the Global Gateway will entail getting complex, lengthy and costly processes under way, at a time when the forthcoming European elections are approaching and the intermediate review of the current budgetary cycle (2021-27) will commence in the same year (*ibid.*).

Figure 4. Summary of the challenges and opportunities for the Global Gateway's coherence and coordination

Coherence and coordination	
Challenges	**Opportunities**
Acceptance and ownership by the member states of the strategic objectives set out Alignment of practices and processes in the EU, in each member state and on the ground: • Between areas • Between actors, including the EIB and the EBRD • Between instruments • At the internal and external levels Lack of intermediate level of work Temporal limits	Strengthening of the coherence of European action, internal and external Reduction of fragmentations, inefficiencies, overlaps and gulfs between the various member states' development cooperation programmes and the Commission

Source: the authors.

3 A climate, energy and connectivity portal

3.1. The Global Gateway and hydrogen in Chile

The hydrogen projects included in the Global Gateway reflect the increase in the hydrogen import targets set out in the REPowerEU as a response to the Russian invasion of Ukraine.[6] These projects also have the objective of contributing to the decarbonisation of partner countries. In Chile's case, it is important to point out that European cooperation was already committed to driving the development of green hydrogen prior to the Russian invasion of Ukraine. The Global Gateway will thus provide an institutional umbrella and strengthening of the European strategy prior to REPowerEU.

In January 2023 the European Commission identified the development of renewable hydrogen in Chile as one of the flagship projects of the Global Gateway. Chile presented itself as an investment destination with notable regulatory, economic and political stability within Latin America. Moreover, Chile has some ambitious climate targets. The country is committed to 80% of its electrical power being generated by renewable sources by 2030 and attaining climate neutrality by 2050, in line with the EU's target.

The hydrogen sector is deemed to be an ideal candidate for the initial development of the Global Gateway, given the widespread presence in Chile of European companies (Acciona, Enel, Engie, Iberdrola, Naturgy and Repsol, among others) and EU member state development agencies in the renewable energy sector: the Spanish Agency for International Development Cooperation (AECID), the German Agency for International Cooperation (GIZ) and the Swedish International Development Cooperation Agency (SIDA).

The lack of legislation covering renewable hydrogen in Chile presented spaces for the exchange of experiences and regulatory cooperation with the EU at a decisive time for the development of international standards for defining renewable and low-carbon hydrogen (International Energy Agency, 2023).

Chile has also been a pioneer in its commitment to hydrogen. In 2020 it published its national hydrogen strategy, the main goals of which included: (a) becoming the cheapest producer of hydrogen anywhere in the world; (b) being one of the main exporters of hydrogen by 2040; and (c) reaching 5GW of electrolysis under development by half way through the present decade. It was estimated that implementing this strategy would require an investment of US$200 billion and would lead to the creation of 100,000 jobs over the next two decades (Energy Ministry of Chile, 2020; Enagás, 2021).

The development of green hydrogen (GH2) in Chile falls within a Team Europe Initiative aiming to promote investment opportunities in the hydrogen field based on four strategic approaches: (a) strengthening a conducive environment for the green hydrogen economy;

6 10 million imported tonnes in addition to the 10 million tonnes to be produced in the EU in 2030.

(b) supporting technological development and human capital; (c) developing the market and regulation; and (d) developing projects and financing.

In the case of GH2 in Chile, the EU hopes to accelerate the decarbonisation of the Chilean economy, creating green jobs and generating business opportunities for Chilean and European companies, while satisfying Europe's own demand for imported green hydrogen and its byproducts (EEAS, nd). An additional goal would be the creation of a market for European technology exports (Energy Ministry of Chile, 2022). These activities will be financed through the Chile Country Window in the framework of the Regional Green Transition Programme for Latin America and the Caribbean, which will be executed jointly by the German GIZ agency and the Spanish AECID (EEAS, nd). However, hydrogen generation projects with European private investment in Chile are in a development phase and their size is relatively modest (less than 5MW of electrolysis) (International Energy Agency, 2022).

To analyse the status of the Global Gateway, its challenges, opportunities and impact on the development of hydrogen in Chile –and after reviewing the literature– five semi-structured interviews were conducted with 10 experts from the private sector,[7] cooperation agencies and local agents lasting between 30 and 60 minutes. The main messages emerging from the interviews are set out below.

3.1.1. Lack of knowledge and communication: in search of the Global Gateway brand

The experts interviewed, especially in the private sector, were unaware of the specific content or even the existence of the Global Gateway despite direct contact with EU member state cooperation agencies and with the EU itself. The Global Gateway thus faces a major communication challenge, both internally (among the European institutions and member states) and with local stakeholders and partners. In this regard, the interviewees pointed out the Global Gateway's principal communication deficits. First, they believe that the strategy is insufficiently inclusive, by not doing enough to incorporate the interests and opinions of local stakeholders. Secondly, they argue that the Global Gateway's narrative places excessive emphasis on its geopolitical dimension to the detriment of its climate ambition. This emphasis on the geopolitical dimension of the Global Gateway is less suited to the renewable hydrogen sector, which is of less geopolitical significance, than other projects included in the Global Gateway in the areas of connectivity and natural resources. Moreover, the thus far limited dialogue relating to the strategy with economic and social actors could pose a reputational risk to the European strategy over the long term amid local partners' potential failure to identify with the initiative.

Aware of the lack of knowledge about the Global Gateway, the European Commission strengthened communication around the strategy in Latin America towards the end of 2022. In Chile, despite the lack of awareness about the dialogue institutions envisaged in the Global Gateway initiative such as the Business Advisory Group[8] –and the absence of a similar institution (perhaps a Citizens' Advisory Council?)– the Commission insists that continuous and fluid dialogue exists with the social actors. Such dialogue takes place on a

7 Various professionals participated in some of the interviews with complementary profiles.

8 It should be borne in mind that the Business Advisory Group was not operational at the time of drafting this policy paper.

regular basis with companies likely to take part in the consortiums that undertake hydrogen projects. Moreover, through the regional climate change plans financed by EUROCLIMA+, the Commission points out that it addresses the concerns of the civil society, town halls and the academic world with regard to the development and implementation of hydrogen projects in Chile.

3.1.2. Implementation pending, minimal interest and negative perception

At the time of drawing up this analysis, the Global Gateway is perceived as an 'idea' that suffers from a lack of concrete specifics according to the experts consulted, especially those belonging to the private sector. Implementation for the comprehensive transformation of the sectors is still to be developed and requires long-term coordination and dialogue with the public and private sectors. Despite the importance of the private sector to the success of the Global Gateway, discussions with some companies have been severely limited to date, sometimes non-existent, creating little interest in the initiative. The European private sector does not think that the Global Gateway is going to have a real impact on the hydrogen sector in Chile, nor does it think that it is a useful foreign policy instrument, even of regulatory diplomacy. Some of the expert interviewees also expressed a certain fatigue regarding the successive European Commission announcements presenting new initiatives that subsequently fail to achieve the expected traction and impact.

The Global Gateway also runs the risk of being perceived as a neo-colonialist project whose objective of trying to counteract (compete with) China's Belt and Road initiative (Gong *et al.*, 2023) has little prospect of coming to fruition. As far as the technological rivalry between the EU and China to produce electricity generating plants is concerned, the interviewees pointed out the cost reduction curve of Chinese suppliers, which threatens to displace many European suppliers even in contexts that stipulate local content in design, where subsidies and aid are available, thereby downplaying the impact the Global Gateway could have in this arena.

3.1.3. Challenges and opportunities of convergence and coherence

The expert interviewees pointed out that the Global Gateway could, however, help the convergence of ideas. This initiative could thus disseminate in Chile the European priorities included in the European Green Deal. To this end it would be necessary to place attention on the transformation of key sectors in the Chilean economy. The Global Gateway could also enhance coherence in European cooperation and development activities. In this regard, as a technical cooperation goal for the development of green H2 in Chile the European Commission has identified helping to even out the regulatory environment and supporting the acceleration of permit concessions, always subject to environmental and social criteria. Among others, the EU hopes to be able to help the acceleration of projects by making use of Copernicus, the European Earth-observation programme. Copernicus would help in project planning, enhancing efficiency in the use of infrastructure and thereby minimising projects' socio-environmental impact.

One expert familiar with the EU ecosystem pointed out the existence of legislative and financial tools within the European institutions to develop a plan such as the Global Gateway in a streamlined and successful way. The main hurdle identified was the sluggishness of the

European Commission when it comes to executing its own plans. Another challenge for the development of the Global Gateway is the improvement in the coordination between the public sectors of the recipient countries and of the EU. Added to this is the complexity of the coordination of all the regulatory, communication, infrastructure development and social acceptance elements, and the potential fragmentation of the activities of the EU and its member states. Lastly, the continuity of the Global Gateway beyond 2024 is not assured.

3.1.4. Conclusions

The lack of interest in and awareness of Global Gateway in the business sector may indicate that this initiative adds little to the existing cooperation and investment mechanisms between the EU and Latin America. The local agents involved in hydrogen development in Chile, who are crucial to the success of Global Gateway, seem to remain indifferent to an initiative they either do not know about or do not understand. The choice of a sector in an incipient phase, namely hydrogen in Chile, may have contributed to accentuating Global Gateway's lack of clarity and specificity perceived by the experts in this case study, substantially reducing its attractiveness. In particular, promoters of renewable hydrogen projects in Chile are running into difficulties in sealing purchase agreements with industrial consumers of fossil hydrogen, while the export market presents challenges of a technical-economic nature.

The cooperation agencies do, however, perceive the Global Gateway as a tool with the potential to lend coherence to the EU's cooperation programme, incorporating the foreign dimension of the European Green Deal. The opportunities for coherence and convergence remain contingent on the need to establish the implementation pathways of the Global Gateway with greater clarity, as well as a comprehensive value proposal for the recipient countries. Furthermore, it is necessary to reflect on the means available to ensure that the vision of the Global Gateway can become a reality through greater two-way dialogue between Brussels and the stakeholders involved in the projects.

3.2. The BELLA programme and EU-Latin America and Caribbean technological cooperation

In the technological arena, and given the positioning of Spain within the EU, one of the most exemplary cases of the implementation of an infrastructure project at a global level is that of the BELLA programme (European Commission, 2022a), which has acquired the status of an integrated strategy. To this end, monographic documentation has been collected from RedCLARA and BELLA, as well as official documents from the European Commission and Latin American National Information Networks, and two interviews were conducted with representatives linked to the management and implementation of the project both in the European Commission and in RedCLARA.

BELLA is the name of the cooperation programme between the EU and Latin America and the Caribbean with the objective of ensuring the high-speed and long-term interconnectivity of the digital ecosystems located in both regions. This programme manifests itself in two ways

(Bella II, nd-b): BELLA-S (which seeks to cover data exchange needs through the deployment of a direct submarine cable) and BELLA-T (which seeks to complete the terrestrial fibre optic network in the region's interior).

The implementation of the first phase of BELLA I, whereby Europe and Latin America were connected directly for the first time in history in August 2021 (Bella, 2018), via the ELLALink submarine cable that joins Sines (Portugal) with Fortaleza (Brazil), and the completion eight months later of the South American terrestrial infrastructure to strengthen the transfer of intra-regional data and data exchanges with Europe, has been hailed as one of the first deliverables of the Global Gateway (European Commission, nd-a). December 2022 saw approval of the BELLA II phase, which seeks to extend the connectivity to more countries in the region. This case is thus ideal in terms of the lessons that can be drawn from it.

3.2.1. As a geostrategic element and challenges of innovative financing

Amid the first challenge set out above of a possible contradiction between the ambition of the Global Gateway –going beyond development cooperation– and the use of ODA budgetary instruments to execute it, the first BELLA I phase was financed by three Directorates-General, one of which is linked to cooperation (DG INTPA) while the other two are not (DG CONNECT, DG DEFIS), which contributed €25 million out of the €45 million total for the project, the remainder –€15 million– being supplied by contributions made by the Latin American academic networks (Bella II, nd-a), and which in some cases obtain the financing directly from their respective national ministries or through public appeals. Some of the Latin American networks that have formed part of the BELLA consortium since phase I are CEDIA (Ecuador), REUNA (Chile), RNP (Brazil) and RedCLARA (Latin America).

The last of these, geared towards the space and defence industries, is particularly striking, although the focus of BELLA and the implementing organisation –RedCLARA– involves using the interconnected data to improve terrestrial observation (Bella, 2021) and to address climate challenges. In this regard, the financing of BELLA I went beyond development cooperation. That said, the new budget for the second phase, BELLA II, comes from the NDICI with DG INTPA, which will provide €13 million over 48 months of execution and is accompanied by another €15 million from RedCLARA, the executive and coordinating institution of the national networks. These figures show a balanced distribution between the EU and its Latin American counterpart both in terms of coordination and financing, which also distances it from the ODA focus.

It is in the arenas of investment ecosystems (Tagliapietra, 2021) and geopolitical risk (Teevan *et al.*, 2022) where certain challenges to the Global Gateway appear, however. The objective of BELLA I was to instal the submarine cable with Brazil in order to subsequently expand the terrestrial cable towards Argentina, Chile, Colombia, Ecuador and Peru. RedCLARA, the coordinating institution, comprises national networks, which are the bodies that get involved with their respective ministries to secure financing and that vary to a large extent depending on the country. The national network in Brazil is larger, with approximately 400 employees, and is funded directly by the Ministry of Science, Technology and Innovation, giving substantial support to BELLA. The national network in Chile has worked closely with the ministry, although the latter still does not fund the network. In Colombia the support comes from various ministries in a distributed way.[9]

Although in the first phase both the EU institutions and the ministries of the Latin American national networks conceived BELLA as a technical project, since the COVID-19 pandemic they have started to view it in a political and geostrategic way. This change of mentality accounts for the fact that attempts have been made to use the source of income that RedCLARA receives from the national networks' contributions to broaden the public impact and human resources, among others. Meanwhile, BELLA II seeks to design, construct and operate the cable in other parts of Peru, as well as Costa Rica, El Salvador, Guatemala and Honduras, and to undertake studies of feasibility, prioritisation of areas and availability of resources in the Caribbean nations, Belize, Bolivia, Mexico, Paraguay and Uruguay.

The fact that RedCLARA seeks to strengthen national networks (1) that are weaker, (2) or are incipient, (3) or receive less funding from the ministries, (4) or have a lower index of economic and social development, shows that this project seeks to have an impact on development, although this impact is strengthened by the support of RedCLARA, which is an organisation of organisations. The BELLA project already existed before the launch of the Global Gateway, with a similar quantity of financing between the first and second phases. Moreover, the EU was already undertaking connectivity projects in the region –ALICE I, ALICE II (RedCLARA, nd)– through the European GÉANT network, but not with RedCLARA, to which the BELLA project was subsequently assigned. Although the European contributions remained constant, there was an increase in funding from the Latin American networks, something that ensures a certain additionality, although not on the part of the European institutions.

3.2.2. Lever of coherence and coordination

As far as the member states' acceptance and ownership of the strategic objectives is concerned, as well as the contributions to the NDICI, it is important to highlight that the execution of the project is undertaken fundamentally by the European and Latin American National Education and Research Networks (NERNs), whose objective is to offer an ecosystem of information infrastructure and services to promote research, education and innovation on a worldwide scale. On the European side, five countries take part from a total of 27: Germany (DFN), Spain (RedIRIS), France (RENATER), Italy (GARR) and Portugal (FCT-FCCN). The pan-European GÉANT also takes part. On the Latin American side it is RedCLARA that coordinates the national NERNs, although those of Brazil (RNP), Chile (REUNA) and Ecuador (CEDIA) stand out in particular for the execution of activities.

As has already been mentioned, GÉANT coordinated ALICE, the project prior to BELLA, which was taken over by the Latin American RedCLARA. The transition towards BELLA shows that the interest of the member states increased –since five of them signed up– although this continues being limited when viewed in relative terms.

9 Información recopilada en entrevistas realizadas anónimamente.

While the BELLA project has exhibited an incremental trend in terms of actors and the alignment of practices both internally and externally, there have been variations in the instruments. Although the line of financing has fundamentally come from NDICI, the origin of the funding has changed, being assigned sometimes by the geographical programme and on other occasions by the thematic programme. However, the variability in the line of financing does not in itself represent a lack of coordination, rather a mere reordering.

Lastly, despite existing prior to the launch of the Global Gateway, the BELLA project has been presented as an engine not only of the latter strategy but also of the construction of a first line of European technological diplomacy (Council of the European Union, 2022) in third countries. Added to this is the Digital for Development (D4D) accelerator hub (Digital for Development Hub, 2023), LAC4, otherwise known as the Latin American and Caribbean Cyber Competence Centre (LAC4) (Parra, 2022), funded by the EU, and the Regional Copernicus Centres in Panama and Chile. This is why it is conceived as the flagship of the EU-LAC Digital Alliance unveiled in March 2023, in a kind of rebranding that seeks to cut down on the fragmentation and overlaps between DG INTPA, DG CONNECT, DG DEFIS, the European External Action Service (EEAS) and the coordination of the various EU delegations in Latin American countries.

In conclusion, the BELLA project is a clear example of the Global Gateway objectives in terms of geostrategic challenges, innovative financing and coordination and coherence. While it is true that this EU initiative had been launched beforehand, it is also a paradigmatic case of the necessary improvements and challenges that an infrastructure project of this calibre represents, particularly due to the importance that relations with Latin America and the Caribbean ought to have for the EU given the burgeoning presence –and influence– in the region of countries like China (Jorge Ricart, 2021a) in strategic technological, scientific and innovation sectors. It will also be strategic for Spain, which should not neglect the importance of innovation in Latin America as a line to pursue in foreign policy (Jorge Ricart, 2021b).

4 Conclusions and recommendations

A series of recommendations can be drawn from analysing the initiative, its challenges and opportunities, both in general terms and in terms of the case studies. These relate to the governance of the tool, the means of ensuring its impact on development, the ownership exercised by all its stakeholders and the challenges surrounding its communication. Their objective is to maximise the initiative's efficiency, the overall impact and its coordination and strategic potential.

4.1. Governance

Some of the concerns and challenges identified around the Global Gateway, as pointed out over the course of this analysis, relate to the efficiency and transparency of the way it is governed. It would thus be advisable first to establish transparent processes for coordination between all the stakeholders. This includes elucidating the participation of the various actors, such that the scope and nature of the role that each plays is clarified. Greater transparency in the way the members of the Business Advisory Group are chosen would also be welcome.

Secondly, for the sake of more efficient governance and more streamlined implementation, it would be advisable to hold the Global Gateway board meetings on a more frequent basis. This proposal would require greater proactivity on the part of the member states in the definition and execution of the project. Moreover, to address the lack of an intermediate level in its management, which is currently impeding the passage of the projects' strategic definition and specific management, working groups could be established to cover this level between the board and implementation.

In order to improve the governance of the Global Gateway it would be worth factoring into its strategic orientation similar initiatives from other large donors, such as the US, China and Japan. What would also be advisable is coordination and complementarity with other tools within the EU itself, such as the Team Europe approach and initiatives, with a comprehensive focus (both whole-of-government and whole-of-Team-Europe).

Lastly, it would be advisable to find a balance between more flexible lead times, ensuring that the partners do not lose interest (thereby avoiding the reputational cost this would entail) and the transparency and coherence of the processes, eschewing rash and hasty formulas, which would also incur the aforementioned reputational cost.

4.2. Impact on development

With the goal of ensuring that the Global Gateway strategy prioritises development as opposed to purely commercial ambitions, measures are needed that guarantee a better alignment between the initiative's programmes and the development objectives established by the EU for this budgetary and legislative cycle. Specifically, and while it is to be expected that a recently-devised initiative may be subject to a process of trial and error, the social development goals need to be integrated to a greater extent into the priorities involving the promotion of green infrastructure and connectivity.

To achieve this, structuring mechanisms and principles need to be established, by for instance using a 'policy first' approach, to ensure the alignment of private participation and interests, of vital importance given the experience and technological potential they bring, with the sustainable development goals. In turn, this will enable the EU to be viewed more clearly as an all-round donor, one that addresses development processes in all their political, social, economic and environmental complexity. Clear mechanisms for evaluating the initiative's impact on development will also need to be made explicit and built in.

Furthermore, the Global Gateway will need to facilitate the participation of the private sector from a wide range of backgrounds, not limiting itself to companies linked to the donor countries. There will be a greater impact on development if the initiative succeeds in mobilising the local private sector in partner countries. All this will contribute to the empowerment of local stakeholders and provide a response to critics who cast doubt on the Global Gateway's capacity to have a net impact on development.

4.3. Ownership

In order to promote and ensure proactive participation and ownership on the part of the member states, something that the overall success of the initiative will partly depend on, it will be important to reinforce the contact between Brussels and the European capitals for the determination of projects by countries. There is a certain perception that the initiative is unilateral, belonging to the European Commission, and a feeling of exclusion on the part of the capitals. This could be made manifest in additional rounds of contacts, or by formalising a process that involves the member states to a greater extent in the strategic definition and setting of Global Gateway projects.

Given that there also seems to be an ownership deficit among the partner countries, or at least the perception of such a deficit, the links with Latin American, Asian and African capitals could also be strengthened and formalised and this close contact constructed in such a way that it better incorporates the partner countries' needs and priorities. In keeping with this, greater ownership and participation on the part of civil society could also be sought.

4.4. Communication

For the strategy as a whole to be accepted and successful, it is necessary to augment its transparency so that the EU's delegations abroad can play a determinant role. An example of the scope for improvement in this regard is the programme's internet portal, where only bare details are given about a considerable number of projects, such as the implementation phase in which they currently find themselves. Here the recommendation would be to align communication efforts with the tool's shortcomings (real or perceived). Communication efforts therefore need to be put into clarifying (a) what the methodology for monitoring impact on development and the projects' additionality will be; (b) how ownership among partners and member states will be promoted; (c) the manner in which priorities will be identified; and (d) how the sources of funding will be ensured, including the manner, the rationale and the timing with which the private sector is expected to participate and how the leveraging of funds is expected to be achieved, bearing in mind that this requires establishing or strengthening ties with actors who are relatively new to development cooperation.

Such communication efforts will additionally need to clarify (e) the strategy's operational criteria; (f) its narrative alignment with other tools, among them the Team Europe approach; and (g) alignment with the sustainable development goals. With regards to the latter, it would be advisable to set objectives over the short, medium and long term to provide a clear view of the strategy's ultimate goals.

It would also be advisable to modify the message from an emphasis on competition to an emphasis on cooperation. In this context, putting the Global Gateway forward as a response to China's BRI could cause it to suffer a lack of credibility and above all emphasise confrontation with China rather than collaboration with its African, Asian and Latin American partners. The modification of the message would also help to offset the risk of the Global Gateway being perceived as a neo-colonialist project, as is happening in the case of China's BRI. Lastly, it is essential that the strategy's communication gives rise to realistic expectations about the Global Gateway, given its nature and scope.

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