



## Transforming of Central Asia-EU Relations in the Context of the EU's Global Gateway Initiative (2021-2024)

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### ABSTRACT

This study examines the strategic and economic dynamics within Central Asia, specifically focusing on the European Union's Global Gateway initiative and its implications for the transformation of regional and international relations. The central research question investigates how the Global Gateway initiative may contribute to the reshaping of economic and geopolitical policies in Central Asia, thereby enhancing the EU's position within the broader context of global competition in the region. The hypothesis posits that, by prioritizing infrastructure development, improving connectivity to global markets, and reinforcing energy cooperation, the Global Gateway initiative has the potential to redefine regional cooperation patterns, subsequently augmenting the EU's geopolitical influence. The research employs a SWOT analysis. Additionally, the study draws upon the Charles King theory, to analyze the broader geopolitical and economic competition between the EU and other global powers in the region, in light of the evolving power structures. This theoretical framework facilitates an exploration of the competitive dynamics at both the global and regional levels, as well as the interactions among major and minor actors in the region. The findings suggest that the Global Gateway initiative offers more than just infrastructure development; it establishes a foundation for long-term cooperation that enhances the EU's influence in regional policymaking. The SWOT analysis underscores the need to consider the geopolitical and economic challenges stemming from global competition and the divergent interests of Central Asian states, while critically evaluating the EU's strategic positioning in these complex interactions.

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## **Introduction**

The Global Gateway Initiative (GGI) of the EU, introduced in December 2021, seeks to establish a novel strategic framework and improve the EU's competitive standing internationally. This project has attracted significant interest, especially regarding the EU's capacity to contend with global forces such as China and the United States. Nonetheless, there has been minimal emphasis on the internal aspects of this strategy, especially regarding infrastructure growth and economic collaboration with different areas, such as Central Asia. This study aims to examine the GGI regarding Central Asia and evaluate its effects on the region's geopolitical and economic dynamics. The primary focus of this research is how the GGI can assist in reshaping the economic and geopolitical strategies of Central Asia and enhance the EU's position in rivalry with other global players in the area.

Central Asia, situated in the center of Eurasia, has historically been a strategic focal area because of its closeness to influential nations such as Russia, China, and Iran. Including Kazakhstan, Uzbekistan, Turkmenistan, Kyrgyzstan, and Tajikistan, the area is abundant in natural resources, possesses considerable geopolitical significance, and encounters major infrastructure development requirements. Consequently, it has turned into a vital battleground for rivalry among international forces. In this context, the EU considers the GGI initiative as a chance to enhance its presence in the area, reinforcing economic and security connections with Central Asian nations while lessening their reliance on competing global powers.

The European Commission has identified multiple important reasons for this initiative, such as tackling global supply chain issues worsened by the COVID-19 pandemic, promoting the advancement of connectivity and networks that adhere to democratic principles and high standards, and closing a \$13 trillion investment shortfall in global infrastructure by 2040 (Furness & Keijzer, 2022: 2). The blend of these motivations and goals renders the GGI an important effort by the EU to incorporate development into its foreign policy. Nonetheless, these objectives signify merely the apparent aspect of a far more extensive strategic aspiration. It appears that the main goal of the EU is to introduce an initiative that matches the significance of China's Belt and Road Initiative (BRI). As a result, the developmental aspects of the GGI are regarded as resources to achieve the EU's wider geopolitical goals. Here's a breakdown of the key reasons on why this strategy is significant:

- **Countering BRI Influence:** The BRI has significantly expanded China's economic and political influence in Central Asia. Many countries in the region have become reliant on Chinese investment and loans, which can lead to political leverage and potential debt traps. The GGI offers Central Asian nations an alternative partner for infrastructure development and economic cooperation, reducing their dependence on China. This is vital for the EU to balance China's growing presence.
- **Geopolitical Significance of Central Asia:** Central Asia's strategic location at the crossroads of Europe and Asia makes it a key region for global powers. It's a vital transit route for energy resources and trade, and it borders Russia, China, and Iran, making it a strategically important area for maintaining regional stability and security. By engaging actively in Central Asia through the GGI, the EU can strengthen its own geopolitical position and play a greater role in shaping the region's future. Ignoring Central Asia would cede further ground to China and potentially Russia.
- **Normative Power vs. Transactional Approach:** The GGI emphasizes sustainable, transparent, and values-based investment, in contrast to the often more transactional approach of the BRI. This allows the EU to project its normative power and promote its values of democracy, human rights, and rule of law in the region. For Central Asian countries concerned about the potential implications of Chinese influence, the EU's approach offers a more palatable and politically acceptable alternative.

- Energy Security and Diversification: Central Asia is rich in energy resources, and the GGI's focus on energy cooperation and diversification is particularly important. By investing in energy infrastructure and promoting renewable energy sources, the EU can help Central Asian countries reduce their reliance on Russia and other energy suppliers, while also supporting sustainable development. This strengthens the EU's energy security and promotes its green agenda.
- Connectivity and Trade: Improving connectivity through infrastructure development is a core component of the GGI. By investing in transport networks, digital infrastructure, and trade facilitation, the EU can help Central Asian countries connect to global markets and enhance their economic development. This also benefits the EU by opening up new markets for its goods and services.

In short, the GGI is not just about infrastructure; it's a strategic tool for the EU to assert its influence in a strategically vital region, counter China's BRI, promote its values, and advance its own economic and security interests. The geopolitical importance of Central Asia makes the success of the GGI crucial for the EU's long-term strategic goals.

In essence, the GGI serves as a connecting link between the EU's strategic goals and its developmental objectives. According to the EU's Global Strategy adopted in 2016, the EU's approach toward the Global South has been labeled as "principled pragmatism" (Colombo, 2021:4). The GGI strategy contributes to the instrumentalization of development aid, directing it toward the EU's economic and security goals. This initiative is seen not only as a means to enhance infrastructure and foster economic development in Central Asia but also as a mechanism to establish a long-term framework for cooperation, thus increasing the EU's geopolitical influence in the region.

Central Asia, particularly in the fields of energy, transport, and infrastructure development, holds significant potential. The region's role as a crucial transit hub for energy, goods, and services makes it an important strategic point for the EU in terms of enhancing its connectivity to larger global markets. Central Asian countries, heavily reliant on major global players for energy resources such as gas and oil, provide the EU with an opportunity to deepen its cooperation in these sectors through investment in energy infrastructure and the development of transportation networks. Additionally, given the region's unique geographic position, Central Asia remains a key area for security-related concerns. Thus, the GGI can be seen as an essential tool for the EU to pursue its economic and security objectives in the region.

In line with this, a SWOT analysis (Strengths, Weaknesses, Opportunities, and Threats) has been employed to assess the challenges and opportunities faced by the EU in implementing this initiative. Furthermore, the paper applies the theory of Power Competition, particularly Charles King's approach, to analyze the geopolitical and economic competition between the EU and other global powers in Central Asia. This theoretical framework explores the dynamics of competition at both the global and regional levels and examines how these competitions shape power structures in Central Asia.

## **Literature Review**

The GGI reflects a wider change in EU foreign policy, focusing on improving worldwide connectivity and strengthening the EU's strategic stance in global competition. This initiative addresses the emergence of BRI, which has become a leading influence in worldwide infrastructure development lately. Researchers like Shreeves, Delivorias, and Caprile (2024) contend that GGI signifies a crucial effort by the EU to enhance its competitiveness through investments in infrastructure initiatives in developing areas, emphasizing sustainability and democratic governance.

The BRI has greatly influenced Central Asia, transforming its infrastructure and enhancing economic ties, especially with China.

Antolini (2024) emphasizes the significant impact of the BRI on the trade routes and energy infrastructure of Central Asia, pointing out China's increasing dominance in the area. The expanding influence of China in Central Asia has raised worries among regional actors and the EU about its rising geopolitical power in the region. Andžāns & Djatkovica (2023) highlight how China's influence in Central Asia is shifting the region's political and economic landscape, posing a challenge to the EU's conventional role in the region.

In light of these changes, researchers have started to explore how the EU can utilize GGI to counter China's increasing sway in the area. As per Andersone (2024), the EU sees GGI not merely as an economic instrument but also as a geopolitical tactic to reinforce its influence in the area and contest China's infrastructure-centric strategy. She contends that although the EU's strategy contrasts with China's—emphasizing higher standards, democracy, and sustainability—its primary aim is to improve Europe's access to international markets and to incorporate Central Asia into its larger connectivity framework.

The EU's past engagement in Central Asia has centered on economic and strategic interests, especially in energy security and regional stability. Research by Muratova & Et al (2023) highlights that the EU has historically shown interest in the energy resources of Central Asia, especially those found in Kazakhstan and Turkmenistan. This interest coincides with the EU's aim to vary its energy imports and lessen reliance on Russia. The GGI offers the EU a chance to enhance energy collaboration with the region, especially by upgrading transport and energy infrastructure.

O'Callaghan (2022) examines how the EU has modified its policy regarding Central Asia, highlighting that although human rights and democracy have historically been key components of the EU's strategy, economic development has similarly gained significance for promoting lasting stability in the area. O'Callaghan states that the GGI represents this change by merging development objectives with the EU's strategic priorities, promoting regional collaboration and geopolitical stability. Consequently, it provides a means to affect the development path of Central Asia while also vying with China and Russia.

Regional collaboration among Central Asian countries is also vital to the EU's strategy. Popławski (2024) contends that entities such as the Shanghai Cooperation Organization (SCO) and the Commonwealth of Independent States (CIS) significantly influence the geopolitical dynamics of Central Asia. Although these organizations are primarily shaped by Russia and China, they offer the EU opportunities for multilateral involvement, especially in sectors such as infrastructure and security. The GGI seeks to leverage these platforms by providing a novel framework for cooperation that aligns the EU's interests with those of Central Asia.

In conclusion, the GGI is viewed as an essential part of the EU's larger strategy to strengthen its presence in Central Asia, harmonizing geopolitical and economic goals. Although a significant portion of current studies has centered on the EU's rivalry with China via the GGI, there is still an insufficiency in comprehending the initiative's particular influence on the EU's connections with Central Asia and its potential to transform the region's geopolitical and economic dynamics. This research aims to address that gap by delivering an in-depth examination of the GGI and its ability to enhance the EU's influence in Central Asia, especially concerning energy, infrastructure, and regional security.

### **Theoretical Framework & Methods of Research**

This research is grounded in Charles King's Great Power Competition Theory, offering a thorough perspective for examining how major powers strategically interact in both regional

and global power relations. This theory asserts that nations, especially major powers, are in constant competition to broaden their influence via economic, political, and military means, all while managing the limitations set by rival powers. This competition is influenced by the interaction of strategic interests, resources, and geopolitical conflicts, often appearing in areas of great strategic importance, like Central Asia (King, 2020).

This study utilizes Charles King's approach to power competition as a theoretical framework for analyzing the geopolitical and economic dynamics surrounding the GGI in Central Asia. King's work provides valuable insights into the multifaceted nature of competition in the post-Cold War era, extending beyond traditional state-centric perspectives to incorporate a broader array of actors and interactions. His emphasis on the interplay between material capabilities, ideational factors, and strategic narratives is particularly pertinent to understanding EU engagement in Central Asia. Specifically, King's approach is beneficial for this research as it enables an examination of these complex dynamics:

- Analyze the competitive landscape: Identify the key actors involved (EU, China, Russia, Central Asian states, etc.) and their respective interests and strategies.
- Examine the role of norms and values: Assess how the EU's emphasis on normative power interacts with the more transactional approaches of other powers like China and Russia. This is crucial for understanding the EU's unique positioning in the region.
- Explore the influence of narratives: Investigate how different narratives about development, connectivity, and regional order shape the perceptions and actions of various actors. This is particularly important in understanding how the EU attempts to differentiate the GGI from the BRI.
- Understand the evolving power structures: Analyze how the interactions and competition among these actors are shaping the distribution of power and influence in Central Asia.
- By utilizing King's framework, this research aims to provide a nuanced understanding of the competitive dynamics at play in Central Asia and how the GGI fits into this complex geopolitical landscape. It allows us to move beyond simply describing the competition to analyzing its underlying drivers and potential outcomes.

Central Asia, being a historically disputed area, acts as an important stage for comprehending competition among major powers. The area's plentiful natural resources, potential for strategic connectivity, and its geographical location connecting Europe, Asia, and the Middle East make it a central aspect of global strategies. Utilizing King's framework, the research investigates the EU's GGI as a tactical reaction to the rising impact of BRI and Russia's aspirations in the region. The theory emphasizes how the EU utilizes its economic influence and normative objectives to establish a unique type of impact that merges development ambitions with strategic necessities.

The GGI is viewed as the EU's initiative to establish its presence in a multipolar world by meeting the infrastructural and connectivity demands of Central Asia. The project intends to deliver top-quality infrastructure investments while also striving to offset the influence of China and Russia in the area (King, 2008). King's theory elucidates how these strategic initiatives are formulated to project power and influence while addressing the competitive demands posed by other significant players.

A unique aspect of the EU's strategy, examined through this theoretical perspective, is its focus on normative power. In contrast to the coercive or transactional methods typically linked to China and Russia, the EU incorporates values like sustainability, transparency, and democratic principles into its development efforts. King's framework aids in comprehending this normative aspect as a means for exerting soft power within the larger competitive landscape.

The theory also offers perspectives on the use of development aid as a tool. The GGI, although presented as a development-focused project, functions as a strategic mechanism to promote the EU's geopolitical goals in Central Asia (King, 2020). Utilizing its economic and political tools, the EU seeks to establish itself as a dependable ally for Central Asian countries, promoting stronger connections that support its long-term strategic goals.

Utilizing King's theory enables the research to examine how the EU maneuvers through the intricate interactions with regional powers like Kazakhstan and Uzbekistan, which aim to optimize their advantages by collaborating with various stakeholders. The EU examines its initiatives to create partnerships that honor sovereignty and regional ambitions as a way to distinguish itself from other global influences.

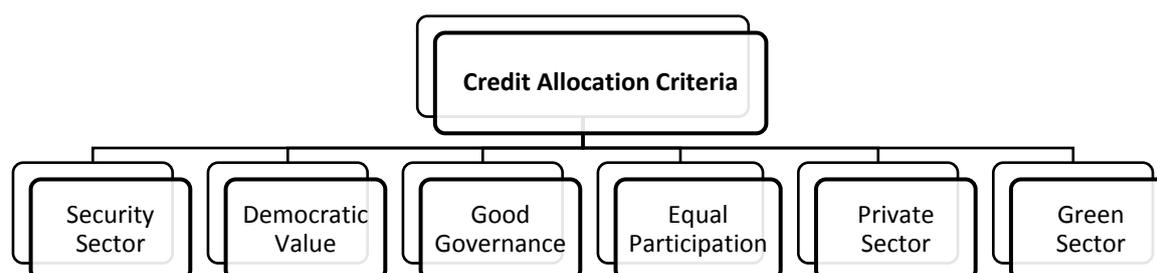
This research utilizes a thorough methodological framework to examine the EU's GGI and its consequences for Central Asia amid the backdrop of strategic rivalry between global powers. The study utilizes the SWOT analysis technique to methodically assess the strengths, weaknesses, opportunities, and threats related to the execution of the GGI in the area. SWOT analysis is well-known for offering a structured framework to assess intricate geopolitical and economic relations (Gürel & Tat, 2017: 995). A SWOT analysis was selected as a valuable framework for this study due to its capacity to provide a comprehensive overview of the internal and external factors influencing the EU's Global Gateway Initiative (GGI) in Central Asia. By utilizing this approach, the research pinpoints key elements that affect the EU's ability to strengthen its presence in Central Asia, such as infrastructure development, regional connectivity, and geopolitical factors. The results of the SWOT analysis provide a basis for evaluating the viability and obstacles of the EU's goals in the area. By systematically mapping these factors, the SWOT analysis provides a structured foundation for understanding the complexities of the GGI's implementation and identifying strategic pathways for the EU to maximize its impact in the region. It offers a practical and accessible way to synthesize a large amount of information and present a clear picture of the EU's strategic position.

Through the integration of SWOT analysis and the framework of great power rivalry, the research seeks to offer a detailed insight into the role of the GGI in establishing the EU as a competitive player in Central Asia. Moreover, this method highlights the initiative's dual characteristics as a development-focused framework and a strategic instrument for promoting the EU's geopolitical objectives.

### **The Credit Allocation and Funding Sources in the EU Global Gateway Initiative**

The main aim of the EU GGI is to tackle worldwide issues in domains like climate change, health, sustainable development, and maintaining resilient supply chains. In this regard, the EU highlights the importance of promoting European values. Through promoting intelligent, clean, and safe investments to improve infrastructure quality, the EU seeks to create a dependable connectivity model with partner countries, enabling the enduring spread of European values to these nations.

The European effort aims not just to enhance financial conditions but also to raise environmental and social standards to their optimum levels. Furthermore, ethical factors can be recognized in this plan. As per its declared goals, infrastructure initiatives must not lead to unsustainable debt buildup in beneficiary nations (Sgobbi, 2022:3). Figure 1 demonstrates the criteria for distributing credit to recipient nations.



**Fig. 1. Credit Allocation Criteria for Recipient Countries under the Initiative**

Source: Author

An examination of the GGI shows that the EU's key investment focuses are on the digital sector, climate and energy, transportation, health, and education. The EU intends to invest in both soft and hard infrastructures. On one side, it highlights the need for physical infrastructure to bolster digital transportation and energy systems; conversely, it aims to boost project management capabilities by drawing in investments and enhancing business environments (Simon & Zandee, 2022: 2-4).

The GGI could allocate as much as €300 billion for infrastructure projects from 2021 to 2027. The execution of these initiatives is overseen by "Team Europe," consisting of EU bodies, member countries, European financial organizations, and private sector participants working together on investments (Furness & Keijzer, 2022: 1).

On a macro scale, the GGI receives funding from new financial tools introduced within the EU's 2021-2027 Multiannual Financial Framework. These consist of the Neighbourhood, Development and International Cooperation Instrument (NDICI), the Pre-Accession Assistance Instrument, the Digital and International Component of the Connecting Europe Facility, Horizon Europe, the European Investment Fund, and more (Sgobbi, 2022:8). This financial distribution system is based on the EU's prior experiences with the External Investment Plan and the Juncker Investment Plan, which were funded by development banks and private investments.

On a micro scale, the funding distribution for the initiative is detailed as follows:

- A total of €135 billion from the European Fund for Sustainable Development Plus (EFSD+), which includes €40 billion designated for loan guarantees. The EIB will oversee €26.7 billion, while the other €13.3 billion will be allocated via EFSD+ for conditional investments.
- €145 billion in investments from development finance institutions within EU member states, enabling loan guarantees at the EU level.
- €18 billion designated as grants within the EU's foreign assistance initiatives (Furness & Keijzer, 2022: 2).

The initiative also encompasses proposals to create European export credit facilities to supplement current arrangements in member states, with the goal of boosting the competitiveness of EU businesses in developing nations. Nonetheless, there is considerable doubt regarding the €300 billion amount. This sum is improbable to close the global infrastructure deficit anticipated by the EU. There are worries about the funding source, as there are no assurances that member states will supply the required contributions. Crucially, the EU's budget for seven years received approval in late 2020, prior to the development of this initiative. Consequently, extra resources are needed to fund the plan. Critics contend that the GGI serves as a promotional gimmick, with the EU merely renaming current projects to give the illusion of initiating new endeavors.

Concerning Central Asia in particular, the area has been a central focus for the EU's strategic investments. In January 2024, the EU along with Central Asian nations pledged a €10 billion investment aimed at developing the Trans-Caspian Transport Corridor. This endeavor, focused on boosting transport links and upgrading infrastructure between Europe and Central Asia, coincides with the EU's objective to expand its geopolitical presence in the area while also promoting economic integration (European Commission, 2024). EIB is also essential in funding sustainable transportation initiatives in Central Asia through co-financing agreements for these projects (European Investment Bank, 2024).

According to the EU's current approach to Central Asia, the region's "strategic geographical position between Europe and Asia, its contribution to EU energy imports, and the market potential of seventy million residents, along with the EU's concern for regional security, have rendered Central Asia a progressively significant partner for the EU." Certainly, the significant opportunities for increased collaboration as well as the possible dangers from the area should not be overlooked (European Commission, 2019).

To sum up, although the GGI offers considerable promise for tackling Central Asia's infrastructure and development issues, it encounters considerable obstacles concerning funding, the coordination of member state goals, and the wider geopolitical landscape. The results of these initiatives will probably influence the EU's future interactions with Central Asia, signifying an important stage in the region's integration into worldwide economic and security systems.

## **The Strategic Dimensions of the EU 's Global Gateway**

### **a) Geostrategic Dimension**

The EU introduced the GGI as a response to BRI, identifying the latter as a major challenge to traditional models of infrastructure investment and proposing a Western alternative (European Parliament, 2021). The EU's primary objective is to promote a democratic version of the Chinese model by fostering dialogue and partnerships in infrastructure development. Given that the BRI has garnered negative reputations in some regions, the EU sees this as an opportunity to leverage its GGI.

Moreover, the EU recently incorporated the Indo-Pacific strategy into its external action framework (2022), reflecting its recognition of the need for collective efforts to counter China's influence. This initiative demonstrates the EU's alignment with international concerns about the role of global actors, bolstering its ambitions against China's geopolitical reach. The GGI, therefore, emerges as a European strategy closely tied to the EU's vision for the Asia-Pacific, while also revitalizing connectivity strategies in Eurasia.

The EU's lack of military power—highlighted during the first and second Ukraine crises—emphasizes its growing reliance on NATO. The GGI serves as a strategic pathway for the EU's engagement in Asia. The Ukraine crisis underscored the risks posed by authoritarian states like Russia, prompting the EU to guard against the entry of another authoritarian actor, China, into its geopolitical sphere. Although the BRI has expanded to Africa and Latin America, China's venture into the Arctic through the Polar Silk Road has particularly alarmed Europe. This concern is further amplified by the BRI's focus on new technologies and digital infrastructures, along with its activation of the "Health Silk Road" (Beg, 2020).

On another level, the GGI can be viewed as an EU effort to establish strategic autonomy from the United States. The announcement of the AUKUS security pact marked a significant shift in EU perspectives, weakening the transatlantic framework. The simultaneous withdrawal of U.S.-led NATO forces from Afghanistan exacerbated tensions, signaling to the EU that it should not over-rely on the U.S. for global security (European Parliament, 2021a).

Regional geopolitics also play a crucial role in shaping the GGI. With the United Kingdom unveiling its "Global Britain" strategy to rapidly strengthen its presence in Asia, India, and the Pacific, the EU is increasingly focused on asserting its role as a geopolitical and geo-economic actor in the region (European Parliament, 2021a). This interest extends beyond China, enabling the EU to enhance its influence across Asia.

China's advancements over the past decade, particularly through the BRI, illustrate its growing dominance in global supply chains. The EU's agenda includes partnerships with the U.S., India, Australia, Japan, and the UK to weaken China's position in these supply chains. The GGI is the EU's version of the BRI, designed to integrate democratic values, the rule of law, and transparency into global connectivity initiatives (Erbas, 2022).

### **b) Developmental Dimension**

The GGI represents a robust initiative with the potential to advance the EU's developmental policies. This strategy aims to focus EU aid expenditures and become a valuable resource for member states. The GGI's goals center on investing in infrastructure, goods, people, and services to foster connectivity without creating dependencies (Lau & Cokelaere, 2021).

As a revitalization of EU connectivity strategies, the GGI echoes the goals of the G7's Build Back Better World (B3W) initiative but emphasizes both hard and soft infrastructure more strongly (Goodman, 2021). This approach intertwines geopolitics with development, with connectivity serving as the linking thread. The EU's concept of connectivity originated with the Erasmus initiative in 1987 and was later elevated to a foreign policy tool in 2021. Connectivity now functions as both a means and an end, supporting economic goals, stability, and influence while promoting infrastructure investments (Sauvignon & Benaglia, 2023).

The EU integrated the connectivity concept into its 2016 Global Strategy, calling for a unified approach to domestic and foreign policies, greater collaboration with EU member states, the European Investment Bank, and the private sector. This strategy emphasized achieving the Sustainable Development Goals (SDGs) through innovative and cooperative connectivity-focused initiatives (Sauvignon & Benaglia, 2023).

The GGI envisions a human-centered development agenda aimed at meeting people's needs through regional infrastructure investments that generate jobs, stimulate local economies, protect the environment, and reduce poverty and gender inequality. Notable EU initiatives integrating connectivity into foreign policy and development include:

- The EU Strategy for Cooperation with the Indo-Pacific (2021)
- The Western Balkans Economic and Investment Plan (2020)
- The EU-Japan Partnership on Sustainable Connectivity and Quality Infrastructure (2019)
- The EU-Asia Connectivity Strategy (2018) (Sia & Sol, 2022).

The GGI emerges as a comprehensive development initiative addressing a \$15 trillion global infrastructure investment gap while aligning with European economic and security interests, the Paris Agreement, and the UN's 2030 Agenda.

## **The Connection Between the GGI and Central Asia**

### **a) Geopolitical Dimensions: Regional Connectivity**

Central Asia was not a significant focus for either program prior to the onset of the war in Ukraine and the intensification of the Taiwan crisis. Therefore, nearly at the same time, the risk of utilizing land pathways through Russia with a shift towards the Middle Corridor rose, while the safety of maritime routes in the Asia-Pacific area diminished.

Over the span of two days at the Investors Forum for EU-Central Asia Transport Connectivity, the EU, Central Asian nations (Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan), along with various global partners, have taken significant actions to initiate the development of the rapid Trans-Caspian Transport Corridor connecting

Europe and Central Asia within 15 days (European Commission, 2024 b). To achieve this, the Forum intended to:

- deliver a clear and definitive message to the five Central Asian nations regarding the EU's political and operational dedication to enhance connectivity with the area via the GGI
- initiate the process for executing and managing investments along the Trans-Caspian Transport Corridor by pursuing specific actions outlined in the Study, particularly by engaging investors on projects, with definitive and achievable timelines and financial obligations.
- secure essential stakeholders for ongoing involvement in the Forum, serving as the primary platform for executing the projects outlined in the Study (European Commission, Forum Investor, 2024c).

The emphasis on transport corridors has been reinforced through the 2020-2030 economic roadmap between Uzbekistan and France and is reflected in a joint declaration with German leaders and their Central Asian partners. The statement highlights a shared interest in promoting the Middle Corridor, connecting it to the GGI, and obtaining funding for these infrastructure projects (Gusseinov & Abykayev, 2023).

In June 2023, the European Commission DG Mobility released the findings of the "Study on Sustainable Transport Connections between Europe and Central Asia" concerning the assessment of potential significant infrastructure initiatives under the GGI. EU evaluations identify the Central Trans-Caspian Network (CTCN) as the most viable option for a sustainable transport corridor (Antolini, 2024: 1). This transport route links the five Central Asian nations of Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan to the EU's expanded Trans-European Transport Network (TEN-T).

The CTCN, featuring a two-tier catchment region across five Central Asian nations, has been recognized for offering the most sustainable transport links between Europe and Central Asia. The establishment of the CTCN would bring multiple advantages for the region, such as improved regional coordination of standardized tariffs and network administration, increased connectivity among Central Asia's economic hubs to bolster regional and global value-chain integration, more streamlined border-crossing procedures to reduce transaction expenses and offer more customer-friendly services, the provision of long-term planning frameworks for project development, prioritization, and execution, as well as enhanced environmental results.

The volume of transit containers on the CTCN is projected to rise from around 18,000 TEUs in 2022 to 130,000 TEUs by 2040 in a business-as-usual scenario. Nonetheless, should investment initiatives and soft connectivity actions be carried out to reach a seamless transit duration of 13 days between the EU and Asian centers, transit container volumes might rise to 865,000 TEUs on the CTCN by 2040. Should containerization grow in Central Asia, an extra 470,000 TEUs of regional container volume might be seen by 2040. Therefore, executing the recognized and prioritized essential measures would not only facilitate Europe-Asia transport but also aid in economic development and transformation in Central Asia (EBRD, 2023: 55).

Critical infrastructure investments in the identified five Central Asian nations are projected at €18.5 billion, targeting the revitalization of railway and road networks, expansion of rolling stock, enhancement of port capacities, and improvements in cross-border transport. In light of Russia's invasion of Ukraine, the Central Trans-Caspian network corridor has acquired significant geopolitical relevance, and if realized, the transport could provide a reliable transit time and route, serving as an alternative to the transport routes through Russia and Belarus.

Concerning the relationship between the EU and Central Asia, overall trade between these regions has increased by 38.8% over the past ten years, rising from €34.2 billion in 2012 to €47.5 billion in 2022, with two-thirds of this trade consisting of imports to the EU (European

Commission, 2024a). The primary exports from the EU to Central Asia include machinery and appliances, chemical goods, and transportation equipment, which together account for 70.7% of total EU exports (European Commission, 2024a). In light of this situation, it is crucial to enhance the transport links to facilitate an efficient exchange of goods and products on a well-developed transport network.

Two initiatives in Central Asia have been revealed, specifically the digital connection of Central Asia (excluding Turkmenistan) and the transformation of water, energy, and climate conditions in the area. Each project will be allocated €20 million in funding. The collaborators in the digital connectivity initiative include the EIB, Estonia, Latvia, and Finland (Gusseinov & Abykayev, 2023).

### **b) Development Dimensions**

After the invasion of Ukraine and the adoption of western sanctions in response, Russia has intensified its cooperation with the Central Asian countries in the energy sector. Its main reasons for expanding regional ties in this sector were, first, to urgently find an alternative to lost European energy markets and, second, to strengthen its political influence in the former Soviet space by increasing those countries' energy dependence on Russia. In this context, Russia has engaged in a two-pronged strategy: it has tried, on one hand, to increase energy purchases by Central Asian countries, and, on the other, to increase their role as transit countries for its hydrocarbons towards China. In July 2023, Gazprom signed a contract with Kazakhstan for the provision of services for Russian gas transit through its territory to Uzbekistan, and supplies began in October of that year. Similarly, Russia has been increasing its supply of petroleum products to Central Asia. Oil transit arrangements with Kazakhstan are important for rerouting Russian exports, including increasing oil exports to China. In return, it provided countries in Central Asia with the opportunity to overcome the electricity sector crisis they faced through electricity imports, power plant modernisation, and the construction of new thermal, hydro, and nuclear plants (Shreeves, Delivorias and Caprile, 2024: 9).

The EU is also investing in energy projects in Central Asia. A recent example is the EIB Central Asia South Asia Electricity Transmission and Trade Project, which seeks to enable Kyrgyzstan and Tajikistan to sell electricity surplus to Afghanistan and Pakistan. Another is the Central Asia Water Energy Programme, which aims to promote energy security and water security at the national and regional levels in Central Asia. Other projects focus on renewable resources and technologies, including the Hydro4U project promoting systems to develop small-scale hydropower potential in the region; the 'sustainable energy connectivity in Central Asia' project, and the 'sustainable hydrogen technology as affordable and clean energy' project (in cooperation with Japan) (Proskuryakova & Yu, 2023).

In a major development, Central Asia was included in the GGI that the EU launched in December 2021 with the aim of supporting investment projects in the area of connectivity, which encompasses transport, and digital and energy links based on the principles of the European Green Deal (Popławski, 2024, p. 3).

The GGI deliverables in Central Asia so far have been less ambitious and will hardly bridge the aforementioned gaps. Two flagship initiatives of the GGI for Central Asia were launched. First, there is the initiative on water, energy and climate change, which includes infrastructure projects in water supply, sanitation, waste management, and hydro power (including co-financing the Rogun Hydropower Plant in Tajikistan<sup>11</sup>), with initial resources of 700 million euros. The second is digital connectivity, which will improve internet connectivity by strengthening the existing Central Asian broadband infrastructure with

satellite connections (through EU's contribution of at least 40 million euros) (Andžāns & Djatkovica, 2023: 20)

The EU and its Member States have been one of Central Asia's main sources of development aid. Between 2014 and 2020, the EU provided €1.1 billion in grant funding, technical assistance, and direct budget support to the region under the EU's development cooperation instrument. This represented a 62 % increase from the previous programming period. Funding for EU external action has increased further under the new Neighbourhood, Development and International Cooperation Instrument – Global Europe (NDICI – Global Europe) (Shreeves Delivorias and Caprile, 2024, p. 5). From 2021 to 2027, EU grant funding for Central Asia is split between the regional program and bilateral programs tailored to each country's priorities and needs. In line with the EU Central Asia strategy, the regional program focuses on:

- Resilience: water and energy, environmental challenges, human and labour rights and gender and LGBTIQI+ equality, rule of law and support to civil society, and regional peace and stability; and
- Prosperity: digital connectivity, support for intra-regional trade and human development, including a focus on 'building back better' after the COVID-19 pandemic (Shreeves, Delivorias and Caprile, 2024: 5).

From the outset, the focus of EU development assistance has varied between countries, with a greater focus on poverty reduction in Kyrgyzstan and Tajikistan. In contrast, Kazakhstan and Turkmenistan became upper middle-income countries in 2014 and 2017 respectively, taking them out of eligibility for EU development aid. Indeed, Kazakhstan is itself now a donor within Central Asia. However, both countries still participate in the EU regional programme and both benefited from the EU's €3 million Central Asia COVID-19 crisis response solidarity programme (EEAS, 2021).

Central Asia is a key partner in the EU's GGI, launched in 2021, which aims to promote investment in infrastructure, in a broad sense, including transport, energy and digital but also areas such as education and health. One of the strategy's key features is the 'Team Europe' approach, which seeks to coordinate the efforts of the EU, the EIB, the European Bank for Reconstruction and Development (EBRD) and the EU Member States. In Tajikistan and Turkmenistan, implementation of the Team Europe approach is hampered by the fact that the EU Member States do not have significant bilateral cooperation programs or presence on the ground. However, two regional Team Europe initiatives – on water, energy and climate change and on digital connectivity – are being implemented as GGI flagship initiatives.

### **Challenges Facing the GGI in Central Asia**

Russia and China have interpreted the EU's growing ambitions in the region since February 2022 as a challenge. The EU's stepped-up activity, both political and economic (notably in the energy sector), could potentially undermine their interests. Therefore, at first they jointly signaled their aversion to the EU's, and more broadly the West's, reinvigorated engagement in Central Asia. However, as the situation unfolded, they came to see these moves as a development that does not undermine their strategic role. In some areas, such as transport and trade, this cooperation has even indirectly benefited them (Popławski, 2024: 7).

Located between China and Russia, the Central Asian countries are to different extents subject to significant and complex influence from both powers, as well as from other neighbors, neighbors of neighbors, and geographically more distant countries. China's BRI has been underway since 2013 and has committed \$1 trillion by 2022, while Europe's GGI only launched in 2021 and will only mobilise up to \$300 billion by 2027 (Gusseinov & Abykayev, 2023). The Chinese and European initiatives are comprehensive strategic

development plans in which infrastructure and logistics projects are part of the programme areas of regional integration.

the EU accounts for more than 42 per cent of total foreign direct investment (FDI) in Central Asia, while the US accounts for 14.2 per cent, Russia for 6 per cent and China for 3.7 per cent. However, a more in-depth analysis shows that European investment has so far concentrated on projects in mining and other sectors. For example, FDI from the EU in Kazakhstan from 2007 to 2019 was 40 per cent, which confirms what J. Borrell says, but the bulk of investment (more than 50 per cent) is in the mining sector, particularly oil and gas extraction. At the same time, transport and storage accounted for only 5% (Gusseinov & Abykayev, 2023). Chinese companies also invest in Kazakhstan's mining industry through their own and subsidiaries in the Netherlands, so the share of Chinese investments in other areas may also be higher than officially stated. Data on the number and cost of transport projects in Central Asian countries financed by China and Europe are compared below. The EU has a certain advantage to become a "partner of choice", being a relatively new player in infrastructure projects in Central Asia and taking into account the experience of China, which allows to achieve objectives at the expense of lower investment and operational costs.

China is focused on developing several transport corridors through Kazakhstan, Kyrgyzstan, Uzbekistan and Turkmenistan to Europe. China's ambitious goals are largely linked to its export-oriented economy, which requires constant availability of markets and uninterrupted supplies of energy resources for the production of goods. Against the backdrop of the escalating situation around Taiwan, China faces the potential threat of losing 60 per cent of its exports and about 70 per cent of its energy supplies across the South China Sea (Eldaniz Gusseinov & Rymgali Abykayev, 2023). It is therefore important for it to diversify its transport routes to reduce its dependence on maritime supplies.

Since the fall of the Soviet Union, with the reinvigoration of national identities and state-building processes in the Central Asian countries, the influence of Russia has gradually diminished. Nevertheless, Russia remains a pivotal power with complex webs of relations. It still maintains economic, political, and military blocs with participants from the region: The Eurasian Economic Union (Kazakhstan and Kyrgyzstan are in), the Collective Security Treaty Organization (Kazakhstan, Kyrgyzstan and Tajikistan are members; all three also host Russian military installations to different extents), and the CIS (all five countries are in, though Turkmenistan is as an associated member). Russia is the third-largest external trade partner to the region as a whole, right behind the EU and China (European Commission, 2023).

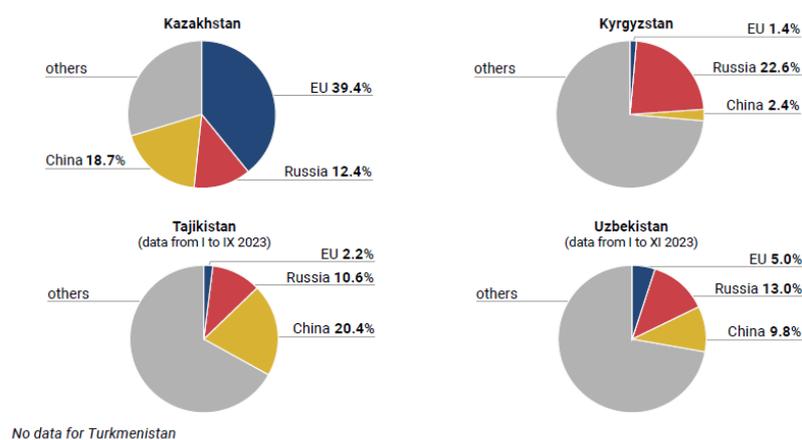


Fig. 2. The share of exports to the EU, Russia and China in the Central Asian countries' structure of exports in 2023

Source: (Poplawski, 2024: 3)

In the political dimension, the Kremlin initially responded to the Central Asian countries' moves towards closer ties with the EU by putting pressure on them, especially Kazakhstan. An example of this was Russia halting shipments of Kazakh oil via the CPC pipeline on four occasions in 2022. It subsequently reduced its pressure under China's influence. At the September 2022 summit of the Shanghai Cooperation Organisation in Samarkand, China expressed its support for the Central Asian countries' sovereignty and territorial integrity while also reaffirming the sustainability of its cooperation with Russia and the existing order in the region, with China and Russia as the dominant actors (Popławski, 2024: 7).

At this stage, neither Russia nor China has come to see the EU's transport ambitions in the region as a direct threat. For China, Central Asia's largest trading partner, the development of transport corridors and infrastructure between this region and Europe aligns with its interests; for example, it expressed its support for the Trans-Caspian International Transport Route at the Belt and Road Forum in October 2023. For Russia, the new trade routes offer an opportunity to gain access to sanctioned goods through this region. China and Russia have adopted a cautious, wait-and-see approach concerning the intensifying cooperation between Central Asia and the EU. China in particular sought an effective way to boost its own attractiveness in the region and to leverage its advantages that stem from its existing engagement in Central Asia and geographical proximity (Popławski, 2024:8). At the same time, we can assume that the current approach which both China and Russia are taking regarding closer links between the EU and Central Asia is temporary and that they have retained the option of blocking these ties as an important instrument at their disposal.

## **The SWOT Analysis Matrix**

### **Strengths**

1. Value-Driven Approach: The EU's emphasis on transparency, sustainability, and democratic values differentiates it from competitors like China.
2. Economic and Technological Capacity: The EU has advanced technological expertise and a strong financial base to support high-quality infrastructure projects.
3. Existing Diplomatic Networks: Long-standing partnerships with Central Asian countries provide a solid foundation for engagement.
4. Focus on Sustainability: The initiative aligns with global priorities such as renewable energy and digital connectivity, appealing to local and international stakeholders.

### **Weaknesses**

1. Limited Regional Influence: Compared to China and Russia, the EU's geopolitical footprint in Central Asia is relatively small.
2. Slow Decision-Making Processes: The EU's bureaucratic systems can delay the implementation of projects, creating opportunities for competitors to dominate.
3. Funding Constraints: Despite substantial pledges, financial resources for the GGI may be insufficient to rival China's BRI.
4. Fragmented Strategies: Lack of cohesion among EU member states can hinder a unified and effective approach in the region.

### **Opportunities**

1. Diversifying Energy Sources: Central Asia offers untapped potential for the EU to reduce its reliance on Russian energy.
2. Geopolitical Shifts: Increasing concerns over China's dominance create openings for alternative partnerships in the region.
3. Regional Development Needs: Central Asia's demand for modern infrastructure, education, and digital technology aligns with the GGI's objectives.

4. Collaboration with Other Powers: Partnerships with India, Japan, and the U.S. could strengthen the EU's position and counterbalance China and Russia.

### **Threats**

1. Competition from China and Russia: Both powers have established influence in Central Asia, challenging the EU's ability to gain traction.
2. Regional Instability: Political unrest, border disputes, and weak governance in some Central Asian states pose risks to project implementation.
3. Economic Dependencies: Many Central Asian countries remain heavily reliant on Chinese and Russian investments, limiting their willingness to engage with the EU.
4. Global Economic Challenges: Inflation, recession risks, and other economic pressures could reduce the EU's ability to finance and sustain large-scale projects.

Based on the identification of the four dimensions of analysis, the following strategies can be derived.

### **Strength-Opportunity (SO) Strategies**

- Leverage Sustainability Expertise: Use the EU's strong commitment to sustainable and green initiatives to develop renewable energy projects in Central Asia, addressing the region's increasing energy demands.
- Enhance Connectivity and Infrastructure: Promote high-quality infrastructure projects under the GGI initiative to strengthen regional trade and logistics, connecting Central Asia with Europe through modernized transport networks.
- Promote Education and Technology Cooperation: Use programs like Erasmus+ and partnerships in digital technology to foster long-term human capital development and build goodwill in the region.

### **Strength-Threat (ST) Strategies**

- Foster Strategic Alliances: Collaborate with global partners such as India, Japan, and the U.S. to present a unified front against China's BRI and Russia's influence.
- Highlight EU Values: Emphasize the EU's focus on transparency, accountability, and environmental standards in project implementation to differentiate from competitors.
- Diversify Regional Investments: Focus on sectors where the EU has a comparative advantage, such as renewable energy, digital infrastructure, and education, to mitigate overreliance on high-risk projects.

### **Weakness-Opportunity (WO) Strategies**

- Increase Regional Engagement: Address limited presence by increasing diplomatic missions and trade delegations to strengthen the EU's influence and understanding of local needs.
- Bridge Financing Gaps: Collaborate with international financial institutions to co-fund large-scale projects and ensure consistent funding for GGI.
- Promote Regional Integration: Support regional cooperation in Central Asia by offering financial and technical assistance for projects that facilitate economic convergence and stability.

### **Weakness-Threat (WT) Strategies**

- Minimize Overlap with Competitors: Avoid direct competition with China and Russia by focusing on niche areas like green technology and governance improvements.
- Improve Public Perception: Launch awareness campaigns to educate stakeholders on the long-term benefits of EU-backed projects over those funded by other actors.

- Enhance Flexibility in Project Design: Develop adaptive strategies to address political and security challenges in Central Asia, ensuring resilience and continuity of EU initiatives.

These strategies aim to align the EU's GGI with the unique dynamics and challenges of Central Asia while capitalizing on opportunities to enhance its geopolitical and economic influence.

### Conclusion

For the EU, the Global Gateway Initiative (GGI) is a chance to really show what they're all about on the world stage, especially in strategically important places like Central Asia. They're putting their money where their mouth is, investing in projects that are sustainable, transparent, and inclusive. This isn't just about economics; it's about offering a different vision compared to China's BRI. In Central Asia, the EU is trying to lead by example, promoting its values while also recognizing the political realities of the region.

Central Asia, with its strategic location and wealth of natural resources, is a prime focus for the EU's Global Gateway Initiative (GGI). The GGI aims to boost connectivity, diversify energy sources, and drive digital transformation – all in line with the EU's core values. But the region is a crowded field. China and Russia are also heavily invested, creating a complex geopolitical puzzle. What sets the EU apart is its commitment to values like transparency, sustainability, and human rights. They're not just looking for a quick return; they're trying to build something lasting and positive. This reinforces the EU's image as a global player that prioritizes shared values over pure economic interests.

The GGI also gives the EU a platform to promote its norms and influence governance in partner countries. The investments in infrastructure come with strings attached: good governance, anti-corruption measures, and environmental sustainability. In a region like Central Asia, where governance and stability are ongoing concerns, the EU's focus on values could be a real game-changer. By choosing long-term sustainability over short-term gains, the EU is offering a compelling alternative to other initiatives. The findings from our analysis are summarized in the SWOT matrix below.

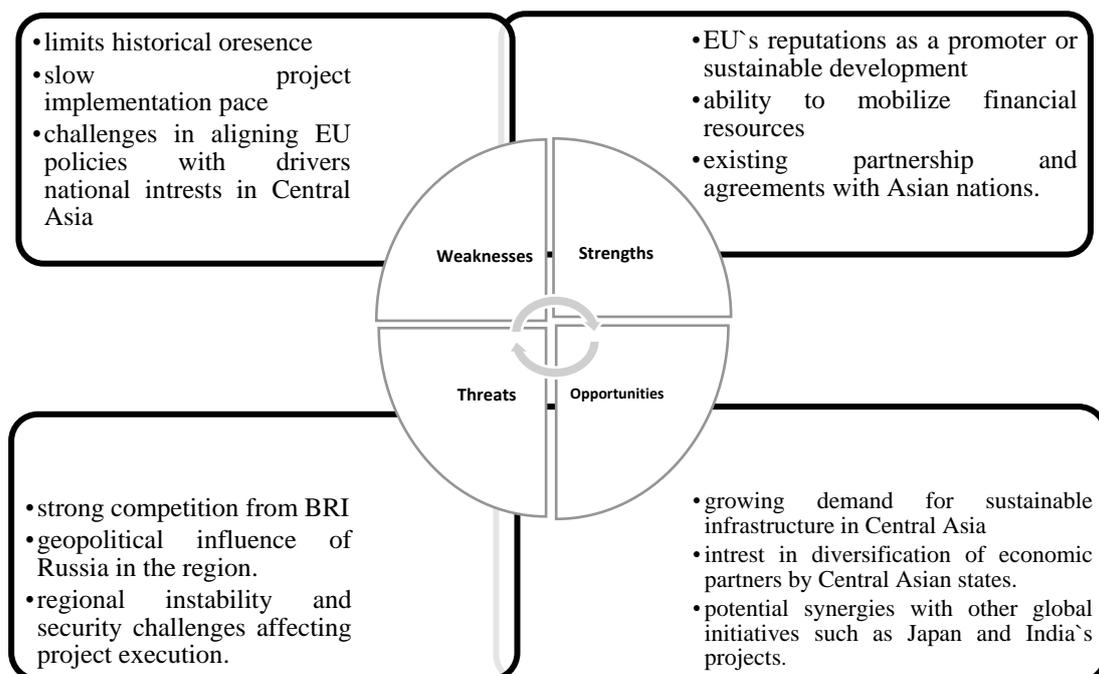


Fig. 3. SWOT matrix results

Source: Author

The EU's Global Gateway Initiative (GGI) faces some serious headwinds in Central Asia. Russia's influence is deeply entrenched, and China's BRI is a massive undertaking, making it tough for the EU to compete. Internal disagreements within the EU about foreign policy don't help either. But here's the thing: the EU's focus on values gives them a unique selling point. It's a different approach than the purely transactional style of China and Russia.

So, what's the EU's game plan? They need to be strategic. First, they should build alliances with other countries that share their values, like Japan, India, and the US. This can amplify the GGI's impact. Second, they need to get local communities on board with their projects. This will make the initiatives more effective and accepted. Third, they should focus on high-profile projects – think renewable energy and digital connectivity – to showcase their commitment to innovation and long-term growth.

The GGI is a high-stakes gamble for the EU in Central Asia. It's a chance to prove themselves as a major global player and offer a values-driven alternative to other geopolitical strategies. The key will be finding the right balance between their ideals and the realities on the ground. If they can pull it off, the GGI could not only boost the EU's standing but also contribute to a more stable and connected world.

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